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Sefton Council 

MEETING: CABINET
DATE: Thursday 9th January, 2025
TIME: 10.00 am
VENUE: Birkdale Room, Town Hall, Southport

DECISION MAKER: **CABINET**

Councillor Atkinson (Chair)
Councillor Dowd
Councillor Doyle
Councillor Harvey
Councillor Howard
Councillor Lappin
Councillor Moncur
Councillor Roscoe
Councillor Veidman

COMMITTEE OFFICER: Debbie Campbell
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The Cabinet is responsible for making what are known as Key Decisions, which will be notified on the Forward Plan. Items marked with an * on the agenda involve Key Decisions

A key decision, as defined in the Council's Constitution, is: -

- any Executive decision that is not in the Annual Revenue Budget and Capital Programme approved by the Council and which requires a gross budget expenditure, saving or virement of more than £100,000 or more than 2% of a Departmental budget, whichever is the greater
- any Executive decision where the outcome will have a significant impact on a significant number of people living or working in two or more Wards

If you have any special needs that may require arrangements to facilitate your attendance at this meeting, please contact the Committee Officer named above, who will endeavour to assist.

We endeavour to provide a reasonable number of full agendas, including reports at the meeting. If you wish to ensure that you have a copy to refer to at the meeting, please can you print off your own copy of the agenda pack prior to the meeting.

A G E N D A

Items marked with an * involve key decisions

<u>Item No.</u>	<u>Subject/Author(s)</u>	<u>Wards Affected</u>	
1	Apologies for Absence		
2	Declarations of Interest Members are requested at a meeting where a disclosable pecuniary interest or personal interest arises, which is not already included in their Register of Members' Interests, to declare any interests that relate to an item on the agenda. Where a Member discloses a Disclosable Pecuniary Interest, he/she must withdraw from the meeting room, including from the public gallery, during the whole consideration of any item of business in which he/she has an interest, except where he/she is permitted to remain as a result of a grant of a dispensation. Where a Member discloses a personal interest he/she must seek advice from the Monitoring Officer or staff member representing the Monitoring Officer to determine whether the Member should withdraw from the meeting room, including from the public gallery, during the whole consideration of any item of business in which he/she has an interest or whether the Member can remain in the meeting or remain in the meeting and vote on the relevant decision.		
3	Minutes of the Previous Meeting Minutes of the meeting held on 5 December 2024		(Pages 5 - 16)
* 4	Gross Payments Report of the Executive Director - Adult Social Care, Health and Wellbeing (Place Director)	All Wards	(Pages 17 - 22)
5	Southport Response and Recovery Report of the Assistant Director – Community Recovery		To Follow

* 6	Approval of Draft Local Nature Recovery Strategy Report of the Assistant Director - Economic Growth and Housing	All Wards	(Pages 23 - 104)
* 7	Gas Supply Contract Renewal Report of the Executive Director – Regeneration, Economy and Assets	All Wards	(Pages 105 - 116)
* 8	Sefton Hospitality Operations Limited - Business Plan Report of the Executive Director – Regeneration, Economy and Assets	All Wards	(Pages 117 - 126)
9	Programme of Meetings – 2025/26 Municipal Year Report of the Chief Legal and Democratic Officer	All Wards	(Pages 127 - 148)
* 10	Council Tax Reduction Scheme and Council Tax Base 2025/26 Report of the Executive Director – Corporate Services and Commercial	All Wards	(Pages 149 - 170)
11	Q1 & Q2 (2024) Corporate Performance Report Report of the Executive Director – Corporate Services and Commercial Annexe A to the report to follow	All Wards	(Pages 171 - 176)
* 12	Financial Management 2024/25 to 2027/28 - Revenue and Capital Budget Update 2024/25 – January Update Report of the Executive Director – Corporate Services and Commercial	All Wards	(Pages 177 - 196)

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THE "CALL IN" PERIOD FOR THIS SET OF MINUTES ENDS AT 12 NOON ON WEDNESDAY, 18TH DECEMBER 2024. MINUTE NO. 76 (3) IS NOT SUBJECT TO "CALL-IN".

CABINET

MEETING HELD AT THE ASSEMBLY HALL, TOWN HALL, BOOTLE ON THURSDAY 5TH DECEMBER, 2024

PRESENT: Councillor Atkinson (in the Chair)
Councillors Dowd, Doyle, Harvey, Howard, Lappin,
Moncur, Roscoe and Veidman

ALSO PRESENT: Councillor Sir Ron Watson CBE

71. APOLOGIES FOR ABSENCE

No apologies for absence were received.

72. DECLARATIONS OF INTEREST

No declarations of any disclosable pecuniary interests or personal interests were received.

73. MINUTES OF THE PREVIOUS MEETING

Decision Made:

That the Minutes of the meeting held on 7 November 2024 be confirmed as a correct record.

74. HEALTHWATCH PROCUREMENT

The Cabinet considered the report of the Executive Director - Adult Social Care, Health and Wellbeing (Place Director) that sought approval to commence a procurement exercise for the provision of Healthwatch services.

Decisions Made:

That

- (1) the commencement of a procurement exercise to establish a new contract post-31 March 2025 for the provision of Healthwatch services, be approved;
- (2) any decisions regarding the Healthwatch services procurement exercise be delegated to the Executive Director - Adult Social Care, Health and Wellbeing (Place Director), in consultation with the Cabinet Member - Adult Social Care and Health;

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- (3) decisions on the commissioning / procurement model, tender evaluation criteria, contract terms and conditions, and service specification to be applied to the procurement exercises, be delegated to the Executive Director - Adult Social Care, Health and Wellbeing (Place Director), in consultation with the Cabinet Member - Adult Social Care and Health, on the basis that the contract can be contained within existing and approved budget provision for such services;
- (4) the contract be awarded for an initial contract term of three years with the option to further extend for a period of up to two years, either as a single extension or via two separate twelve-month extensions, subject to satisfactory performance and demonstration of value for money of the successful supplier, and the required budget being available, and that decisions on the awarding of the contracts, and any permitted extensions thereof, be delegated to the Executive Director - Adult Social Care, Health and Wellbeing (Place Director), in consultation with Cabinet Member - Adult Social Care and Health and Deputy Leader;
- (5) in the event that it be identified during the contractual period that the contract needs to be amended to reflect factors such as increases in demand for Healthwatch services or changes in national funding arrangements, then delegated authority be granted to the Executive Director - Adult Social Care, Health and Wellbeing (Place Director), in consultation with the Cabinet Member - Adult Social Care and Health to approve any such variations, under the proviso that they fall within the associated delegated authority and are in line with the applicable procurement regulations and the cost can be met from within the services budget; and
- (6) the Executive Director - Adult Social Care, Health and Wellbeing (Place Director), in consultation with Cabinet Member - Adult Social Care and Health, be authorised to implement a maximum six-month extension to the current Adult Social Care commissioned Healthwatch service contract, in order to ensure that a compliant procurement exercise can be conducted, to ensure that Healthwatch services continue to be delivered and to also ensure that sufficient notice period is given to the current Provider so that wider principles such as those within the New Realities agreement are met.

Reasons for the Decisions:

To ensure that a procurement exercise took place, and existing contractual arrangements were extended to ensure ongoing delivery of Healthwatch services post-31 March 2025.

Alternative Options Considered and Rejected:

None.

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75. SEFTON NEW DIRECTIONS

The Cabinet considered the report of the Executive Director - Adult Social Care, Health and Wellbeing (Place Director) updating on Sefton New Directions and provided a 2025/26 budget position for the company, including any risks for the Council and the progress of New Directions in relation to the review of services and transformation programme.

Decisions Made:

That

- (1) the financial information / update provided in the report be noted; and
- (2) the fact that the Sefton New Directions transformation programme is ongoing, the purpose of which is to achieve positive outcomes to support with the ongoing sustainability of the company, be noted.

Reasons for the Decisions:

Sefton New Directions remained a key partner of both Sefton Adult Social Care and Cheshire and Merseyside Integrated Care Board, supporting them to deliver strategic priorities and services to support some of the most vulnerable people in Sefton.

The transformation programme of Sefton New Directions was on-going and critical to ensuring that services they delivered were re-shaped so that they could continue to meet the needs of Sefton, were sustainable, offered value for money and could be delivered within the current budget.

Alternative Options Considered and Rejected:

There were no alternative options to be considered, given that it was previously agreed that regular updates on the transformation programme and budget position of Sefton New Directions would be regularly reported back to the Cabinet.

76. MAKING SPACE FOR WATER CROSSENS SUDS SCHEME

The Cabinet considered the report of the Assistant Director - Operational In-House Services that sought approval to authorise the pre-procurement contract award, as described within the report, for the Making Space for Water scheme to manage flooding in the Crossens area; and seeking approval by the Council to a supplementary capital estimate of £1.75m funded from £1.6m Environment Agency Grant funding, subject to a funding award, and £0.15m from the Highways capital programme.

Cabinet Members welcomed the scheme as good news.

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Decisions Made:

That:

- (1) the pre-procurement report describing the tender process to procure the contractor for the Making Space for Water Crossens SuDS scheme as outlined in the report, be approved;
- (2) delegated authority be granted to the Assistant Director - Operational In-House Services in consultation with the Cabinet Member – Public Health and Wellbeing, to award the contract resulting from the procurement; and
- (3) **the Council be recommended to approve** a supplementary capital estimate of £1.75m, funded from an Environment Agency grant of £1.6m, subject to funding being allocated by the Environment Agency, and £0.15m from the Highways capital programme, as outlined in the report.

Reasons for the Decisions:

The use of a national framework for procurement to a single supplier was appropriate for the scheme.

Alternative Options Considered and Rejected:

Sefton Council's Highway term contractor was considered as the contractor for the scheme, but with their current workload and lack of experience in this type of flood suds scheme, it was considered that they would be unable to deliver the scheme in a timely fashion.

77. **ADOPTION OF SUPPLEMENTARY PLANNING DOCUMENTS - SHORT TERM HOLIDAY LETS AND BOUNDARY TREATMENTS**

The Cabinet considered the report of the Assistant Director - Economic Growth and Housing indicating that the Council had recently consulted on the following Supplementary Planning Documents (SPDs):

- Boundary Treatments SPD
- Short-term Lets SPD

Having considered the responses received, in conjunction with the Cabinet Member - Housing and Highways, it was proposed that the SPDs, incorporating any changes recommended in the report and appendices, should be reported to the Cabinet for adoption, to enable them to be given weight as material considerations when planning applications were determined.

The following appendices were attached to the report:

- Appendix A - Boundary Treatments SPD

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- Appendix B - Short-term Lets SPD
- Appendix C – List of comments submitted through the consultation on the SPDs

Decision Made:

That the Short-term Lets and Boundary Treatments Supplementary Planning Documents (SPDs) be approved for adoption and use in planning decisions.

Reasons for the Decision(s):

On approval, the SPDs would be published on the Council's planning webpages and used in assessing planning applications and appeals.

Alternative Options Considered and Rejected:

The alternative would be not to adopt the SPDs. This would require planning decisions to be made using outdated policies. In the case of the Short-term Lets SPD, there would be no local policy coverage.

78. SOUTHPORT EASTERN ACCESS AND MARITIME CORRIDOR MAJOR SCHEMES - LAND ACQUISITION

The Cabinet considered the report of the Assistant Director - Highways and Public Protection seeking in principle authority to acquire the necessary land, outside of the ownership of the Council, to enable the construction of Phase 2 of both the Maritime Corridor and Southport Eastern Access Highway Schemes. The additional land, beyond the current highway boundary, was required to provide the additional capacity required at the junctions and the cycle and walking routes that formed an essential element of both schemes. Whilst every effort was being made to acquire the land and other interests by negotiation, it might be necessary to make a compulsory purchase order (CPO) to acquire the necessary land interest, should negotiations not be successful. The Cabinet was requested to authorise the in-principle use of compulsory purchase powers. This would be followed in the future by a second resolution, formally making the CPOs, if deemed necessary.

The following Appendices were attached to the report:

- Appendix 1 - CPO Map for Maritime Corridor
- Appendix 2 - Schedule for Maritime Corridor
- Appendix 3 - CPO Map for Southport Eastern Access
- Appendix 4 - Schedule for Southport Eastern Access

Decisions Made:

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That

- (1) the in-principle use of compulsory purchase powers under Part XII of the Highways Act 1980 and the Acquisition of Land Act 1981 to secure the compulsory acquisition of the land shown coloured pink on the plan attached at Appendix 1 to the report, to deliver the Maritime Corridor Improvements, be approved; and
- (2) the in-principle use of compulsory purchase powers under Part XII of the Highways Act 1980 and the Acquisition of Land Act 1981 to secure the compulsory acquisition of the land shown coloured pink on the plan attached at Appendix 2 to the report, to deliver the Southport Eastern Access Improvements, be approved.

Reasons for the Decisions:

Following Legal advice sought, it was considered that the proposed CPO was necessary to facilitate the delivery of both schemes and that the statutory requirements for the use of compulsory purchase powers under the Highways Act 1980 had been met. The Order Lands had been determined to be the minimum needed to deliver both Schemes and the Schemes had both been designed to minimise the impact on those with land interests in the area. Given the significant public benefits that would be achieved with the delivery of the Schemes and the support of local, regional and national policy, it was considered that the use of compulsory purchase powers was necessary and justifiable in the public interest, and this should warrant a first stage 'in principle' resolution to allow the Council to move forward.

Alternative Options Considered and Rejected:

Relying on the securing of all land packages by negotiation had been considered, but this approach had been considered to involve significant risk to the Council in either the land not being secured in the funding window or the Council having to pay significantly in excess of the land value in order to persuade the landowner to sell.

79. ENTERPRISE ARCADE BUSINESS CASE

Further to Minute No. 16 of 25 May 2023, the Cabinet considered the report of the Executive Director – Regeneration, Economy and Assets indicating that the Enterprise Arcade was being delivered and funded as a capital project within the Southport Town Deal Programme. The Enterprise Arcade would provide a co-working and collaborative workspace for creative and digital businesses in Southport with a mix of accommodation comprising a collaborative Ground Floor Food and Drink based offer; a co-working / hot desk and start-up space on the first floor; three 'grow on' offices on the second floor; and a large single office on the third floor identified as suitable for an 'anchor tenant' for the project.

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The report indicated that in May 2023 the Cabinet had agreed to a recommendation to adopt direct responsibility for management of the facility, on the basis that a future report would be presented on the operational Business Plan for the building. The report now provided a summary of the Business Plan, as physical works on the project progressed towards completion early in 2025.

Cabinet Members welcomed the project.

Decisions Made:

That

- (1) the Business Plan Profit and Loss Statement of Operation based on the Council taking a direct role in the management of the Enterprise Arcade be noted; and
- (2) the fact that existing budgets will be utilised to allow the project to become operational and deliver the commitments to outputs set out in the Southport Town Deal, be noted.

Reasons for the Decisions:

The Enterprise Arcade was delivering an important element of the Southport Town Deal that sought to increase the sector representation of Creative and Digital businesses in Southport and across the Borough as a whole. In this way Enterprise Arcade would provide a focus for the sector, a hub for collaboration and a base for skills and learning development in a work-based environment. In addition, it would help diversify the town centre and local economy.

The business Profit and Loss statement of operation would continue to exist as a live operating model, would be monitored and managed in a positive and proactive manner to ensure the best possible outcome (financially, economically and socially) for the Council, the Borough, and those businesses and individuals engaged in the provision of the dedicated digital and creative work space.

Next steps for the project involved ongoing dialogue with prospective tenants and marketing of the facility to the market. Further refinement of the operational cost associated with the facility would be undertaken to refine estimated figures.

Alternative Options Considered and Rejected:

- i) Commercial Lease to Digital and Creative Operator - The original intention with the project was to lease the entire building and associated operation to an external provider. The tender for an external provider was not successful due to a number of reasons including a limited number of operators in this specialist area and

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changes within the market. The Council was unable to identify a suitable operator and consequently agreed to operate the facility direct, in the short term, to ensure the facility could open on completion. The Council would however, continue to explore a partner to work with so the building could operate in the original manner envisaged, but this might not be necessary for the successful operation of the asset and the opportunity.

- ii) Keep in Council Use - An alternative approach could be for the Council not to progress with letting out the space in the building. This could result in the risk of clawback from the funders as the project was not delivered as intended, reputational risk and a reduced town centre regeneration impact.
- iii) Lease to a non-digital/creative 3rd Party or sell the building on completion This would result in non-compliance of the Town Deal grant and could result in grant clawback. Depending on the use, town centre diversification and growth of the local economy might not result.

80. ICT MANAGED SERVICE CONTRACT

The Cabinet considered the report of the Executive Director – Corporate Services and Commercial that provided a summary of the procurement process completed for the provision of ICT Managed Services to Sefton Council from 1 October 2025 and provided the rationale for the award recommendation.

The following Appendix was attached to the report:

- Appendix A – Key Performance Indicators

Decision Made:

That authority be granted to award the contract detailed in the report under Crown Commercial Services (CCS) Framework Technology Services Lot 3b, Operational Services, for a period of four plus one optional contract year to Agilisys Ltd and delegated authority be granted to the Executive Director - Corporate Services and Commercial, in consultation with the Cabinet Member - Corporate Services to grant the optional contract extension, if deemed appropriate.

Reasons for the Decision:

The Authority had completed a PCR2015 compliant procurement process and recommended the award of the Contract for ICT Managed Services to Agilisys Ltd from October 2025 for a period of four plus one optional year. The recommendation ensured the delivery of a contract in line with both

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the quality and cost requirements of the tender and in addition, allowed the Authority to build on its existing good relationship with Agilisys Ltd.

Alternative Options Considered and Rejected:

There were no viable alternatives.

81. Q1 & Q2 (2024) CORPORATE PERFORMANCE REPORT

The agenda item was withdrawn.

82. FINANCIAL MANAGEMENT 2024/25 TO 2027/28 - REVENUE AND CAPITAL BUDGET UPDATE 2024/25 – DECEMBER UPDATE

The Cabinet considered the report of the Executive Director – Corporate Services and Commercial informing the Cabinet of:

- 1) The current position relating to the 2024/25 revenue budget.
- 2) The current forecast on Council Tax and Business Rates collection for 2024/25.
- 3) The monitoring position of the Council's capital programme to the end of October 2024:
 - The forecast expenditure to year end.
 - Variations against the approved budgets and an explanation of those variations for consideration by Members.
 - Updates to spending profiles and proposed amendments to capital budgets necessary to ensure the efficient delivery of capital projects.

The following appendix was attached to the report:

- Appendix A – Capital Programme 2024/25 to 2026/27

Cabinet Members recognised the pressures on certain services that all Councils were experiencing.

Decisions Made:

That

Revenue Outturn

- (1) the current position relating to the 2024/25 revenue budget be noted;
- (2) the actions being taken to refine forecasts and identify mitigating efficiencies to ensure each service achieves a balanced position be noted;

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- (3) the remedial action plan measures previously approved by the Cabinet on 7 November 2024, as outlined in section 3 of the report, be noted;
- (4) the financial risks associated with the delivery of the 2024/25 revenue budget be recognised and it be acknowledged that the forecast outturn position will continue to be reviewed, and remedial actions put in place, to ensure a balanced forecast outturn position and financial sustainability can be achieved;

Capital Programme

- (5) the spending profiles across financial years for the approved capital programme, as set out at paragraph 8.1 of the report, be noted;
- (6) the latest capital expenditure position as at 31 October 2024 of £28.498m, as set out at paragraph 7.3 of the report, and the latest full year forecast is £83.015m, as set out at paragraph 7.4 of the report, be noted; and
- (7) it be noted that capital resources will be managed by the Executive Director - Corporate Service and Commercial to ensure the capital programme remains fully funded and that capital funding arrangements secure the maximum financial benefit to the Council, as set out at paragraphs 7.7-7.9 of the report.

Reasons for the Decisions:

To ensure the Cabinet was informed of the current position in relation to the 2024/25 revenue budget.

To provide an updated forecast of the outturn position with regard to the collection of Council Tax and Business Rates.

To keep Members informed of the progress of the Capital Programme against the profiled budget for 2024/25 and agreed allocations for future years.

To progress any changes that were required in order to maintain a relevant and accurate budget profile necessary for effective monitoring of the Capital Programme.

To approve any updates to funding resources so that they could be applied to capital schemes in the delivery of the Council's overall capital strategy.

Alternative Options Considered and Rejected:

None.

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Report Title Here

Gross Payments

Date of meeting:	9 January 2025		
Report to:	Cabinet		
Report of:	Deborah Butcher		
Portfolio:	Adult Social Care		
Wards affected:	All		
Is this a key decision:	Yes	Included in Forward Plan:	Yes
Exempt/confidential report:	No		

Summary:

To seek approval to implement gross payments for Adult Social Care residential and nursing care homes.

Recommendation(s):

- (1) To approve the implementation of gross payments for Sefton and out-of-borough care homes.
- (2) To delegate authority of decisions on the implementation programme plan for gross payments and any future changes to how gross payments are made to care homes to the Executive Director - Adult Social Care, Health and Wellbeing / Cheshire & Merseyside ICB Place Director, in consultation with the Cabinet Member for Adult Social Care & Health and Deputy Leader.
- (3) To delegate authority of decisions on any amendments on how gross payments are made (for example the inclusion of any third-party top-up payments) are delegated to the Executive Director - Adult Social Care, Health and Wellbeing / Cheshire & Merseyside ICB Place Director, in consultation with the Cabinet Member for Adult Social Care & Health and Deputy Leader and the Executive Director of Corporate Services and Commercial.
- (4) To note that reports on the implementation of gross payments and associated debt impacts and debt recovery work will be submitted to Cabinet and other Council governance groups as part of wider debt management reporting.

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1. The Rationale and Evidence for the Recommendations

- 1.1 Sefton's current annual expenditure on care home placements is in the region of £52m. The sector remains strategically important and consists of in the region of 3,621 bedspaces, with Sefton commissioning around 50% of these.
- 1.2 Sefton's current contractual arrangement with care homes is to pay them the Local Authority contribution to the cost of placement only; net of the Service User's financial contribution toward their assessed care needs and any agreed third-party top up for additional services. Care home Providers have historically highlighted that these arrangements are administratively burdensome and result in additional costs for them with respect to administering such payment arrangements. The last benchmarking exercise showed only two other regional Local Authorities pay net.
- 1.3 Currently Adult Social Care pays care home providers net of client contributions, and the care homes are responsible for collecting client contributions of approximately £11.6 million per annum.
- 1.4 Clients who are in Sefton funded care home placements who are financially assessed to pay a client contribution, pay their contribution direct to the Care Home. Where Care Homes are unable to collect the client contribution then Sefton are responsible for paying this to the Home and collecting the debt from the client or their representative. There has been an increase in requests from care homes to the Council to pay client contributions which they have been unable to collect on our behalf. There are usually 40-50 requests per year, but currently Payments and Billing staff are dealing with on average 10 requests per month. In the last year the cost of unpaid client contributions that care homes have requested the Council pay is £276,000, and we have little control over this.
- 1.5 The Care Act 2014 and recent Local Government Ombudsmen (LGO) input has led to other Local Authorities paying the full gross cost of the care home placement to the Care Home Provider and then arranging for the Service User's contribution to be collected by the Local Authority directly. It is viewed that this is beneficial for Service Users and their families as it removes financial matters from their 'relationship' with the Provider, however such views do take into account that Third-Party Top-Ups would be included in such arrangements and are the predominate issue.

Previous reports have highlighted that paying gross would assist the Council to:

- Adhere to what is viewed as being good practice (such as that outlined in LGO decisions), greater adherence to the Care Act and the mirroring of neighbouring Local Authorities payment arrangements.
 - Reduced risk of Service User finance abuse and Safeguarding's as Providers will not have visibility of their finances.
 - Identify at an earlier stage where contributions are not being paid.
 - Improved market oversight on Provider fee levels – as a key element of the project will be to ascertain from Providers their fee levels and third-party top-up rates.
- 1.6 In addition, paying gross can also be viewed as supporting the overall policy decision of ensuring that the Council implements Page 18ims of the Care Act and also amends its

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processes in line with what is viewed as being good practice, especially with respect to supporting the care home market and making arrangements for Service Users less onerous.

- 1.7 As previously approved by cabinet Adult Social Care has set up a gross pilot project with 5 care homes, and residents of these homes or the person who manages their finances will instead pay their client contribution to the council, rather than it being collected by care homes. Any top-up arrangements in place with the care home will remain unchanged. The response from home managers has unanimously been positive.

Update on the pilot

- 1.8 The pilot consists of 5 homes throughout Sefton. There are 72 residents in these homes who are being funded by Adult Social Care and who pay a client contribution. The total value of the client contributions is £17,210 per week.
- 1.9 All homes were visited to gather information regarding individual clients including their payment history. Two Payment & Billing Officers have been appointed within the Client Support service to support with the project and a Social Worker post was created to support people who lack capacity and have no formal representatives.
- 1.10 The pilot went live in July 2024 for the period 10 June – 7 July 2024. To-date we have issued 366 invoices totalling £352,684.37 with £342,786.44 paid to date, an overall collection rate of 97.19%. A key factor in the high collection rate level has been the 2 additional Payment & Billing Officer posts created to support the pilot project, who were proactive in contacting Residents or their representatives to support with payment arrangements.

Proposed implementation

- 1.11 It is envisaged that the implementation of gross payments across all care homes will take up to two years, however additional Staffing resources may be put in place to reduce the implementation period, subject to resources being available from current Staffing budgets.
- 1.12 With respect to the implementation of gross payments, should the recommendations be approved, then it is proposed that the implementation plan for individual care homes is linked to the implementation of the new Sefton care home framework, which was approved by Cabinet in May 2024. Work on the development of this framework is taking place, which includes formulating new contractual terms and conditions. It is proposed that these reflect that payments to care homes under any new contract would be paid gross. Therefore, it is proposed that for the implementation of gross payments, those Sefton homes which sign up to the new framework will be the main cohort of homes to have gross payments implemented in the first instance.
- 1.13 However, it is recognised that the implementation plan for Sefton homes will also need to take into account other operational factors such as prioritising homes / groups of homes that may have a significant number of Residents within them and who will therefore benefit from a more timely implementation.
- 1.14 It is therefore recommended that decisions on the implementation programme plan for gross payments be delegated to the Executive Director - Adult Social Care, Health and

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Wellbeing / Cheshire & Merseyside ICB Place Director, in consultation with the Cabinet Member for Adult Social Care & Health and Deputy Leader.

- 1.15 It is also proposed that the implementation solely relates to the client contribution element of fee rates and not any top-up arrangements in place with the care home, which would continue to be paid directly to the care home by the third-party. However, this approach will be subject to ongoing review, and should the approach be looked to be amended, then it is recommended that decisions on any such amendments are delegated to the Executive Director - Adult Social Care, Health and Wellbeing / Cheshire & Merseyside ICB Place Director, in consultation with the Cabinet Member for Adult Social Care & Health and Deputy Leader and the Executive Director of Corporate Services and Commercial.

2. Financial Implications

The level of income collected in client contributions for care home residents in 2023/24 was £18.7million, of this £11.6million was collected by care homes. Based on current collection rates for care packages (85%), if this was applied to client contributions collected by care homes, then care home debt could increase by a further £1.74million. However, given the additional staffing resource supporting with the project, we would anticipate a higher collection rate of at least 90% which would mean the increased debt would be £1.16 million. Based on the current pilot collection rates of 97.19% the increase in debt would be £330k. This is based on Adult Social Care staff conducting intensive work to contact residents or their representatives regarding making payments, and is only sustainable for the first 1-2 invoices generated.

The current level of care home debt is £10.85million, the largest portion relates to pending court of protection cases where clients lacking capacity cannot access their finances, and property cases where Sefton accrues a debt.

Full implementation of gross payments will therefore lead to an increase in bad debt and the need for the service to fund this if it is written off.

This paper outlines that there will be phased roll out of gross payments therefore any financial pressure will take time to develop however the service can't wait for the issue to materialise before identifying funding. As a result a sum of £0.400m will be added to the services efficiency programmes, most notably with respect to the care home sector from 25/26. It is however, hoped that such levels of debt be reduced given the overall strategic aim to make less care home placements, and going forward the implementation of Direct Debit arrangements will also support with collections and debt prevention. This extra cost will therefore be reviewed each year as part of the council's budget setting process.

The risk of debt is mitigated by ensuring people are provided with advice and support on financial arrangements when they or their family members move to a care home placement. Adult Social Care also acts as corporate appointee and refers to the Court of Protection to minimise the risk of debt. Where people own property, deferred payment agreements are offered in order to secure charges against property. Further documentation has also been developed for people to sign as a further check, and other opportunities are continually explored to prevent debt. Where debt does occur, debt oversight and collection processes have been strengthened.

3. Legal Implications

- Care Act 2014
- Care & Support Statutory guidance

4. Risk Implications

Adult Social Care debt is included in the Service Risk Register due to the potential financial risk.

5. Staffing HR Implications

If full implementation of gross payments arrangements were to be implemented across all care homes then with current staffing levels it is predicted that a full implementation would take 2 years for all 1,300 paying residents, and from the date agreement to fully implement is given. This is based on a 12-week cycle of 150 residents being transferred. Therefore, if an additional 2 staff were recruited the full implementation would take 1 year (Grade G, approximate cost £72k, this does not take into account project management capacity).

6 Conclusion

The rationale for the recommendations in the report have been formulated based on the positive outcomes of the pilot project, and to ensure that Sefton continues to support the Sefton care home market.

Alternative Options Considered and Rejected

To continue with current payment arrangements – this option has been considered and rejected due to:

- The positive outcomes of the pilot.
- The need to ensure that payment arrangements are compliant with best practice Care Act guidance, and reduces the chances of legal challenge/complaint.
- Enables Sefton to intervene at an earlier stage if client contributions are unpaid, so reducing financial abuse.
- Removes financial matters from the relationship between residents and care homes.
- Improved market oversight of Provider fee levels.
- Reduces the administration burden on care home providers.
- The benefits of paying gross for self-funders who own property and are taking up a deferred payment agreement with the council, whereby their placement is commissioned by the council under contracted rates, ensuring property equity lasts longer.

Equality Implications:
The equality Implications have been identified and mitigated.
Impact on Children and Young People: Care Homes do support younger adults aged 18 and above who will therefore benefit from the recommendations in this report.
Climate Emergency Implications:
The recommendations within this report will have a Neutral impact.

Agenda Item 4

What consultations have taken place on the proposals and when?

(A) Internal Consultations

The Executive Director of Corporate Resources and Customer Services (FD.7900/24) and the Chief Legal and Democratic Officer (LD.6000/24) have been consulted and any comments have been incorporated into the report.

(B) External Consultations

Engagement has taken place with key stakeholders such as care homes as part of ongoing engagement and during the pilot project.

Implementation Date for the Decision :

Following the expiry of the “call-in” period for the Cabinet decision.

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Appendices:

There are no appendices to this report

Background Papers:

There are no background papers to this report

Agenda Item 6

Cabinet / Council Report	Sefton Council 		
Report Title:	Approval of Draft LCR Local Nature Recovery Strategy		
Date of meeting:	9 January 2025		
Report to:	Cabinet		
Report of:	Assistant Director (Place) Economic Growth and Housing		
Portfolio:	Cabinet Member – Housing and Highways		
Wards affected:	All		
Is this a key decision:	Yes	Included in Forward Plan:	Yes
Exempt/confidential report:	No		

Summary:

The Liverpool City Region (LCR) Local Nature Recovery Strategy is being prepared by the LCR Combined Authority as ‘responsible body’ in line with government deadlines, with public consultation on the draft Local Nature Recovery Strategy due to take place from February 2025 and the final Local Nature Recovery Strategy to be approved in mid-2025. Sefton Council as a ‘supporting authority’ should approve both the draft and final Local Nature Recovery Strategy prior to their approval by the Combined Authority. The purpose of this report is to seek Council approval of the draft LCR Local Nature Recovery Strategy prior to its consideration by the LCR Combined Authority. The LNRS is a cross-cutting theme across several Cabinet Member portfolios and Services.

Recommendation(s):

That Cabinet:

- (1) On behalf of Sefton Council as a supporting authority, recommend the draft Liverpool City Region Local Nature Recovery Strategy is approved for consultation by the Liverpool City Region Combined Authority as responsible body;
- (2) Delegate authority to the Cabinet Member for Housing and Highways, in consultation with the Assistant Director Place (Economic Growth and Housing) or the Chief Planning Officer, to agree any subsequent changes to the draft Local Nature Recovery Strategy arising through the supporting authority and Combined Authority approval process; and
- (3) Delegate authority to the Chief Planning Officer, in consultation with the Cabinet Member for Housing and Highways, to make minor editorial and presentational changes to the draft Local Nature Recovery Strategy arising through the supporting authority and Combined Authority approval process.

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1. The Rationale and Evidence for the Recommendations

- 1.1 To allow the Liverpool City Region (LCR) Combined Authority to approve the draft LCR Local Nature Recovery Strategy for public consultation, in line with national requirements. Supporting authorities such as Sefton Council must agree the draft LNRS prior to its approval by the Combined Authority.

Introduction/Background

- 1.2 The 2021 Environment Act set out a requirement for the preparation of Local Nature Recovery Strategies (LNRSs) by 2025, to:
- Agree priorities for nature's recovery (reversing the decline in biodiversity)
 - Map the most valuable existing areas for nature
 - Map opportunities for nature recovery and wider environmental goals.
- This is in the light of loss of biodiversity nationally and locally in past decades, for example in grasslands, lowland peat and heathland in Sefton and/or the Liverpool City Region (LCR).
- 1.3 To do this, the draft LCR Local Nature Recovery Strategy (LNRS) will consist of:
- a statement of biodiversity priorities (attached)
 - a local habitat map which will be web-based and interactive (pdf representations only for Sefton attached, not the LCR as a whole).
- 1.4 The LCR Combined Authority is the 'responsible body' for preparing and approving the LNRS for the Liverpool City Region. Like the other LCR districts, Sefton Council is a designated 'supporting authority' with a specific role in this preparation process. The LCR LNRS is being prepared in line with national requirements, evidence such as a report on the state of nature in the LCR and consultation with supporting authorities, land managers, other key stakeholders and the local community. The Combined Authority intends to carry out public consultation on the draft LNRS to take place from February 2025, and on the final LNRS in mid-2025, in line with Government's deadlines.
- 1.5 The LNRS is cross-cutting across several Sefton Cabinet Member portfolios (for example Public Health & Wellbeing, Housing & Highways, Regeneration & Skills) and Services. Sefton Council as a supporting authority should agree both the draft and final LNRS prior to their approval by the Combined Authority.

LNRS linkages and benefits

- 1.6 The LCR LNRS will agree priorities for nature's recovery, map the most valuable existing areas for nature and map opportunities for nature recovery and wider environmental goals. While the Sefton Coast is internationally valuable for nature (habitats and species), other parts of Sefton are also important, for example, agricultural areas (bird feeding), coast, community and other woodlands and wooded estates (red squirrel, bats, breeding birds, farmland mammals) and Countryside Recreation Areas and parks throughout Sefton's urban areas (existing or potentially important areas for biodiversity or for wider environmental goals).
- 1.7 Potentially, nature recovery and restoration of the natural environment has a range of benefits for Sefton, notably to people and the environment. These may include helping adapt to and mitigate for climate change (e.g. temperature, carbon emissions, flood risk), increased access to quality green spaces and local improvements to air and water quality; all with inherent economic and health and

well-being benefits. Responses to LNRS public consultation in autumn 2023 highlighted the importance of these well-being and access to nature benefits for local people.

- 1.8 Once approved the LCR LNRS could, potentially, influence how Council Services such as Green Sefton and Highways, manage their assets. It may encourage moves towards particular funding initiatives and be a focus for attracting any future new nature-related funding income streams, for example environment-led agricultural payments, tree planting/ carbon offsets, off-site biodiversity net gain. Potentially the LNRS may lead to increased green skills and training opportunities within Sefton, including Natural Alternatives, for example. For the Planning Service, any future review of the Local Plan should have regard to the LNRS.
- 1.9 The preparation of the LCR LNRS has provided an opportunity for Sefton to help shape and deliver LCR nature recovery priorities. Green Sefton, Planning and other Council officers, supported by advice from Merseyside Environmental Advisory Service (MEAS) officers, have had an input to the preparation of the emerging LNRS, in line with corporate and partner Landscape Development priorities. MEAS have also provided specialist technical advice and support to the Combined Authority. Key Cabinet Members have been briefed. The Combined Authority have consulted the public and specific groups such as landowners as well as the Council.
- 1.10 The 2021 Environment Act also introduced mandatory biodiversity net gain (BNG) in all development (except nationally exempt development, such as house extensions); now in force. Other net gains for biodiversity may be required by other local development plan documents. The LCR LNRS will provide guidance to the Planning Service, developers and the public about the preferred habitat type for on-site or off-site biodiversity net gain, and preferred locations for off-site biodiversity net gain.
- 1.11 Additionally, the 2021 Environment Act amended the 'biodiversity duty' for all public authorities introduced by the Natural Environment and Rural Communities Act 2006. The Council must 'conserve and enhance biodiversity in the exercise of its functions' (not just 'conserve'). This also links to the activities and priorities of Services such as Green Sefton, Highways, Asset Management and Planning. The Act also introduced new environmental reporting duties for local authorities.

Draft LNRS Statement of Biodiversity (nature recovery) Priorities

- 1.12 The Draft LCR LNRS Statement of Biodiversity Priorities sets out background, context, a Vision, habitat and species priorities for nature recovery in the LCR, an overview of the Local Habitat Map and a section of delivery of the LNRS.
- 1.13 Habitat priorities and headline measures for nature recovery in the draft LCR LNRS focus on the following broad habitat types: wetland and watercourse, coastal and estuarine, grassland, woodland and trees, urban and farmland habitats. A number of mapped and unmapped measures / actions are included for each habitat priority. Species priorities and measures include bats, ground-nesting birds, willow tits, forester moths, Natterjack toads, non-protected reptiles and amphibians, and red squirrels.

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- 1.14 For example, one of the 'urban' priorities is "*More high quality and interconnected green and blue infrastructure in urban areas designed in collaboration with communities*", with a measure for '*Use of roadside verges, railways and other linear infrastructure to connect areas of biodiversity, and aid movement of key species*'.
- 1.15 While there are currently no new funding streams specifically for delivery of this or any LNRS, once approved the LCR LNRS could potentially influence how Council Services and other landowners manage their assets, encourage them to move towards particular funding initiatives or help attract any future new nature-related funding income streams. Mandatory biodiversity net gain may help delivery of the LNRS. Other factors that will play a role in delivery include continued collaboration, partnership working, community involvement and care, behavioural change, skills and capacity building and on-going recording and monitoring.

Draft LNRS Local Habitat Map

- 1.16 The Local Habitat Map is made up of two components:
- Areas of Particular Importance for Biodiversity (APIBs) – existing areas
 - Areas that Could become of greater importance for Biodiversity (ACBs) - potential nature opportunities.
- 1.17 **Areas of particular importance for biodiversity (APIBs)** are the most valuable existing areas for nature are. They include internationally, nationally and locally designated sites (Local Wildlife Site and Local Geological Sites) and 'irreplaceable habitats (which are very difficult to replace once lost).
- 1.18 For Sefton, such sites include the Sefton Coast. Inland areas include Local Wildlife and Geological Sites such as North Meols Estate, Churchtown, Wham Dyke Meadows in Formby, Ince Blundell and Little Crosby Estates, Rimrose Valley and Canal and Whinny Brook in Maghull. Irreplaceable habitats as defined in the National Planning Policy Framework include ancient woodland and lowland fen. Sefton's only ancient woodland is in Lydiate.
- 1.19 The aim set out in the draft LNRS is that, wherever possible, APIBs should be enhanced and expanded, managed for biodiversity and connected by the opportunities identified in the LNRS. There are actions / measures identified for these areas which relate to those identified in section 6 of the Statement of Biodiversity (nature recovery) Priorities.
- 1.20 **Areas that could become of particular importance for biodiversity (ACBs)** are places where an opportunity to enhance, restore or create habitat has been identified. These areas and their associated measures have been mapped based on where action would have the greatest impact for nature recovery and for people (taking into account factors like the needs of nature, ability to provide multiple benefits, aspects relating to climate change, nearby habitats, existing constraints and deliverability). Again, these actions / measures relate to those identified in section 6 of the draft Statement of Biodiversity Priorities.
- 1.21 There has been Council and community input to the draft Local Habitat Map and actions/ measures. While they would have the greatest impact for nature, the measures/actions are not binding and do not prohibit other habitat creation, enhancement or management measures on these sites or areas or action in other areas. Identification of a site as an ACB would not prevent other forms of land use,

or development of that site. Rather, they show developers, planners and others where there are opportunities identified to do something significant for nature recovery and what the best action to take would be (for example through mandatory biodiversity net gain for development proposals). They identify the preferred habitat interventions to support nature recovery of locally important species.

- 1.22 Across Sefton (and indeed the whole LCR) the Draft Local Habitat Map identifies a number of Areas of Particular Importance for Biodiversity and Areas that Could become of greater importance for Biodiversity and associated actions / measures. These are subject to the caveats set out in the draft Statement of Biodiversity Priorities (see paragraph 4.6 above). For example, these sites and areas include:
- Main parks across Sefton (the largest parks with the biggest range of facilities) and other Council-owned sites which are considered to be priority potential sites for 'off-site biodiversity net gain'
 - 'Greenways' networks of parks, the canal and other key paths / routes, other greenspaces, countryside recreation areas, across Sefton and notably within Bootle and Netherton, such as grassland enhancement and wetland enhancement in Rimrose Valley
 - Safeguarding important bird roosting sites and management of the intertidal habitat at Seaforth Nature Reserve
 - Red squirrel measures in Formby Pine Woodlands
 - Habitat creation including woodland and wetland habitats in Lunt Meadows and Forest Park
 - Enhancement and invasive species control in Lydiate's Ancient Woodland
 - Wetland enhancement and invasive species control measures on Whinny Brook, Maghull
 - Woodland enhancement and pond management in Hesketh Park, Southport.

Next steps

- 1.23 The Combined Authority intends to approve the draft LCR Local Nature Recovery Strategy for public consultation after it has been approved by Sefton Council and the other supporting authorities, with public consultation taking place from February 2025. The Combined Authority's intention is to approve the final LNRS in mid-2025, again after prior approval of supporting authorities.

2. Financial Implications

- 2.1 There are no direct revenue implications arising for the Council from this report. The LCR Combined Authority is the 'responsible body' for preparing the Local Nature Recovery Strategy (LNRS). Sefton's input to the preparation process, including its formal role as a supporting authority, has been met from existing resources.
- 2.2 There are no new funding streams specifically for implementing any LNRS. However, once approved, potentially the LCR LNRS could influence how Council Services manage their assets. Potentially also, the LNRS may be a focus for attracting any future new nature-related funding income streams.

3. Legal Implications

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3.1 There are no direct implications arising from this report. However, any failure of the Council to approve the consultation draft and final Local Nature Recovery Strategy in line with the timescale for the subsequent draft and final approval by the LCR Combined Authority could have implications and lead to delays in the draft and final approval of the Local Nature Recovery Strategy by the LCR Combined Authority.

4. Corporate Risk Implications

4.1 Any risk would seem be to the Council's reputation, as Sefton's approval is needed before the Combined Authority can approve the draft Local Nature Recovery Strategy for public consultation. The Combined Authority is required to prepare the Local Nature Recovery Strategy in line with government guidelines and timescales.

5. Staffing HR Implications

5.1 There are no direct implications arising from this report.

6. Conclusion

6.1 It is concluded that Council should approve the draft LCR Local Nature Recovery Strategy prior to its consideration by the LCR Combined Authority, in line with the recommendations set out elsewhere in this report.

7. Alternative Options Considered and Rejected

7.1 None. The LCR Combined Authority have advised that Local Nature Recovery Strategy (LNRS) supporting authorities such as Sefton Council must agree the draft LNRS prior to its approval by the Combined Authority.

Equality Implications:

There are no equality implications. The Local Nature Recovery Strategy may help increase access to higher quality nature space in Sefton, including for disadvantaged groups.

Impact on Children and Young People: No

The Local Nature Recovery Strategy may help increase access to higher quality nature space in Sefton, including for disadvantaged groups.

Climate Emergency Implications:

The recommendations within this report will

Have a positive impact	Yes
Have a neutral impact	No
Have a negative impact	No
The Author has undertaken the Climate Emergency training for report authors	Yes

The potential benefits of the Local Nature Recovery Strategy in relation aspects of climate change and the Climate Emergency are set out in the report.

What consultations have taken place on the proposals and when?

(A) Internal Consultations

The Executive Director of Corporate Services & Commercial (FD.7862/24) and the Chief Legal and Democratic Officer (LD.5962/24) have been consulted and any comments have been incorporated into the report.

(B) External Consultations

Consultation about Sefton's input to the LCR Local Nature Recovery Strategy has also taken place with Green Sefton, Highways, and other officers, with Merseyside Environmental Advisory Service. Relevant Cabinet Members have been briefed.

The Combined Authority has carried out consultations with the community, farmers and landowners, health stakeholders, Council officers and other partners and stakeholders. The Local Nature Recovery Strategy has an Advisory Board and Technical board, which include officer representatives from range of organisations and groups including Sefton Council, members organisations also part of Sefton Coast Landscape Partnership, and Merseyside Environmental Advisory Service. See the Combined Authority website - [Local Nature Recovery Strategy | Liverpool City Region Combined Authority \(liverpoolcityregion-ca.gov.uk\)](http://liverpoolcityregion-ca.gov.uk)

Implementation Date for the Decision

Following the expiry of the "call-in" period for the Minutes of the Cabinet Meeting

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Appendices:

Draft Liverpool City Region Local Nature Recovery Strategy prepared by the Combined Authority – strategy and representational PDF map of Sefton only, not the whole of the LCR (as set out in paragraph 1.3 above)

Background Papers:

There are no background papers available for inspection.

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Liverpool City Region Local Nature Recovery Strategy

Statement of Biodiversity Priorities
Draft

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Foreword

- Mayor & Cllr Burns

Foreword by Gideon Ben-Tovim OBE, Chair of Nature Connected

It has been a privilege for Nature Connected to have been centrally involved in supporting the development of this exciting Local Nature Recovery Strategy for the Liverpool City Region.

As the Local Nature Partnership for the Liverpool City Region, we have for the last 10 years or so ,with Mersey Forest as our accountable body ,been building a network of collaboration and action amongst environmentalists ,local authorities, public, private and voluntary bodies ,academics and activists , to protect and enhance the beautiful blue and green resources of our unique region

We see this Strategy as a very significant step forward in this journey. As the Chair of the LNRS Advisory Board I am very grateful to all the stakeholders who have supported our work in holding the Combined Authority to account over the development of the Strategy .

I thank too the members of the LNRS Technical Advisory Panel , led by Tom Burditt ,Chief Executive of the Lancashire Wildlife Trust ,for their expert input and advice in the development of the Strategy .

And I am deeply grateful for the invaluable efforts of Michelle Whalley, Development Manager from Mersey Forest ,for her role on behalf of Nature Connected in coordinating all the aspects of governance, oversight, challenge and advice that have been crucial to the very wide engagement that lies behind this document.

Finally, I must pay tribute to the outstanding work of the LCR Combined Authority Environment team, particularly Rachel Waggett, Lead Officer for the Environment, and Project Manager Emma Galbraith ,for their commitment, skill and inclusivity in weaving the work of the core team, including colleagues from MEAS and LJMU, into a compelling final document.

The next steps will of course be to move towards the successful delivery over the coming period of this excellent, far- reaching Strategy. We as Nature Connected look forward to continue to play a vital part in helping, through this game-changing initiative, to strengthen our region's extraordinary natural assets which play such an important part in our region's character and in our population's health and well being.

1. Vision

Our vision is one of a wildlife-rich Liverpool City Region with a clear pathway to nature recovery, where the benefits of nature are maximised, appreciated and enjoyed by all.

Where nature is recovered and thriving.

Where people and nature are connected.

Where action is community-led.

Where the importance of the natural environment is understood and respected.

Where green and blue spaces address the needs of local communities.

Where nature underpins the local economy and informs decision making at every level.

Where the impacts of climate change are mitigated.

And where together the Liverpool City Region contributes towards national nature recovery.

2. What is a local nature recovery strategy (LNRS)?

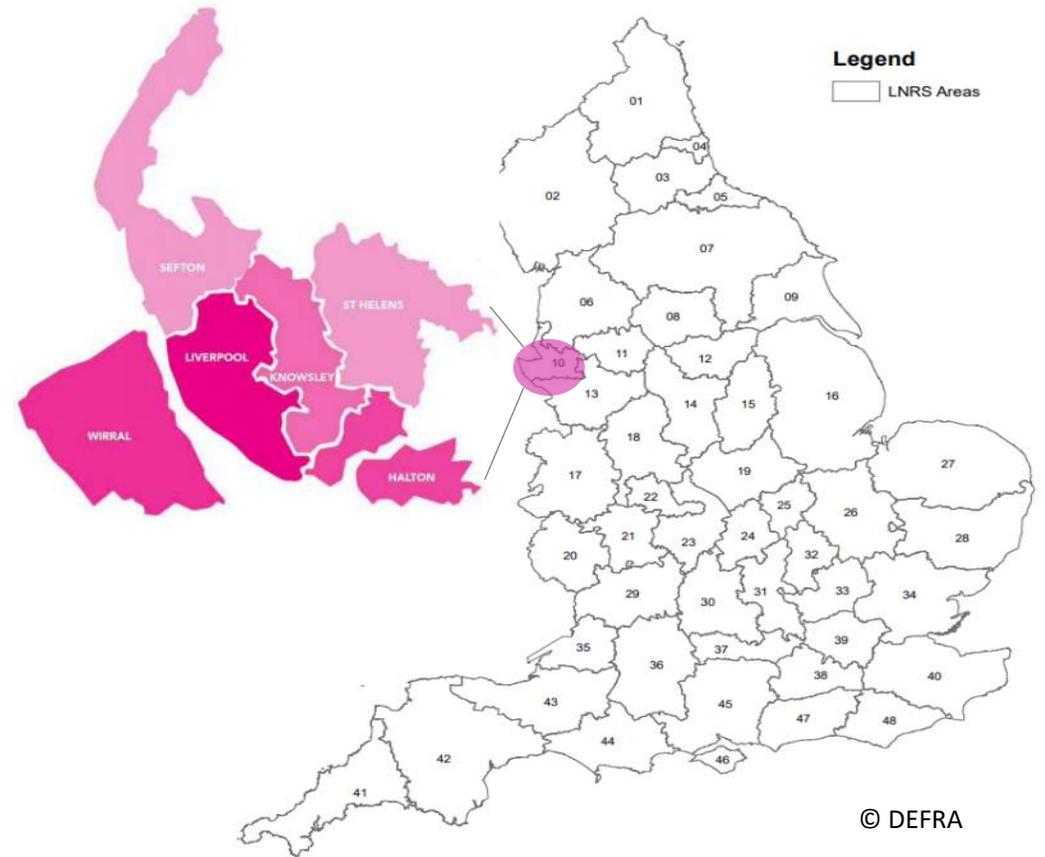
The Local Nature Recovery Strategy (LNRS), introduced in the Environment Act (2021), is an evidence-based, locally-led, spatial strategy, designed to provide a joined-up, regional approach to nature recovery.

There will be 48 LNRSs covering the whole of England, together forming the Nature Recovery Network, a major commitment in the government’s 25 Year Environment Plan.

Our strategy follows the same boundary as that of the Liverpool City Region, which comprises of Wirral, Sefton, Liverpool, Knowsley, St Helens and Halton.

Using local knowledge from a variety of stakeholders and residents of the Liverpool City Region, it **identifies and maps opportunities for habitat enhancement, restoration and creation, where the biggest benefit will be felt to both nature and people.**

The strategy is intended to be used by all, no matter how big or small a contribution to nature recovery you could provide. We all have a role to play, from planters in gardens to landscape scale habitat creation. A joined-up approach is needed to help nature thrive across the region.



2.1 Purpose and remit

Building on the Lawton Principles¹ of more, bigger, better, and joined-up habitat networks, the LNRS establishes a set of priorities for nature recovery across the region, providing a framework for coordinated, collaborative action that will result in the biggest benefit for nature and for people.

The LNRS focusses on areas that could become of importance for biodiversity (ACBs) and measures (practical actions) to deliver nature recovery. The Local Habitat Map that accompanies this document identifies these opportunities as well as our existing areas of particular importance for biodiversity (APIBs). However, it does not commit landowners within the identified opportunity areas to implementing any changes in land use, nor does it prevent development or give permission to create habitat without appropriate consultation.

While the strategy is nature-led, wider environmental benefits are also core to the LNRS and factored into the opportunities identified for nature recovery. The strategy seeks to optimise environmental outcomes, contribute to national environmental objectives, address societal needs and enable access to the broadest range of potential funding sources for delivery of nature positive outcomes.

The LNRS aims to be both ambitious and realistic, considering local pressures and land uses wherever possible. The strategy will complement existing nature conservation plans, initiatives and habitat management plans, notably on designated sites. LNRS must align with and be additional to the actions set out within existing designated site management plans. For this reason, actions for important species such as sand lizard may not be included as plans are already in place to support their recovery. The Strategy can however promote wider actions such as buffering designated sites.

The LNRS will be reviewed and updated in 3 – 10 years, as and when responsible authorities are instructed to do so by the Secretary of State.



2.2 Strategic Context

The LNRS aligns with both national legislation and local plans and policy.

[The Environment Act](#), which became law in 2021, sets the UK's framework for protection of the natural environment. For nature, it establishes a legally binding target to halt species abundance decline by 2030 and ensure species abundance in 2042 is greater than it is in 2022. It also strengthens the biodiversity duty on public bodies, introduces **biodiversity net gain**, protected site strategies and species conservation strategies, and launches **local nature recovery strategies**.

The [25 Year Environment Plan](#) and subsequent [Environmental Improvement Plan 2023](#), set ten 10 goals for the protection and preservation of the environment. Notably, the plan sets an objective to protect 30% of land and sea for nature by 2030, in agreement with the Global Biodiversity Framework. It also strives to ensure that everyone in England lives within 15 minutes' walk of a green or blue space; increase tree and woodland cover from 14.5% of land area to 16.5% by 2050; restore 280,000 hectares of peatland in England by 2050; restore 75% of water bodies to good ecological status; support farmers to create and restore 30,000 miles of hedgerows by 2050; restore 75% of Sites of Special Scientific Interest to favourable condition by 2042; reduce emissions of nitrogen oxides by 73% and ammonia by 16% by 2030; and reduce the rates of introduction and establishment of invasive non-native species by at least 50% by 2030.

National targets require at least 70% of protected features in Marine Protected Areas to be in a favourable condition by 2042. Defra guidance dictates that marine opportunities should not be included or mapped in this iteration of LNRSs. However, there are opportunities upstream and within the intertidal zone that can affect the marine environment. There is strong support from stakeholders for addressing marine recovery at a City Region level. The Northwest Marine Plan provides a regional framework and future tools such as **Marine Net Gain** are expected to be a key mechanism to support marine recovery.

[Biodiversity Net Gain \(BNG\)](#)

As of 2024, the planning system now requires new developments to result in a measurably positive impact ('net gain') on biodiversity. Development must result in a 10% biodiversity uplift compared to what was there before, meaning creation or enhancement of habitat is required and this must be managed for a minimum of 30 years. Developers are incentivised through a 15% BNG uplift to create and enhance habitats in areas of 'strategic significance': those mapped within the LNRS, meaning BNG provides a way to fund delivery of nature recovery.

In line with the National Planning Policy Framework, the LCR has an existing [Ecological Network](#) which forms part of Local Plan evidence bases. The network maps designated sites, wildlife-rich habitats and stepping stone habitats following Lawton Principles. From this, 17 Nature Improvement Areas (NIAs) were mapped that provide strategic opportunity for targeted habitat interventions and management, and which provide an important starting point for the LNRS.

In 2022 a [State of Nature Report](#) was completed by Merseyside Environmental Advisory Service (MEAS), providing a health check for the region’s natural environment. This report underlined that we are in a state of climate and ecological emergency and provided a snapshot of species and habitat trends which are heavily degraded and in a long-term trend of decline. Findings from this report are referenced throughout the strategy.

As part of its Devolution Deal with Government, the Combined Authority is preparing a statutory land-use planning framework known as a **Spatial Development Strategy** (SDS). The emerging SDS addresses key planning matters and has a dedicated policy for the natural environment and nature recovery. In alignment with the LNRS, this policy seeks to ensure plans and proposals protect, enhance, improve and expand valued green and blue spaces, landscapes and the natural environment, and any appropriate mitigations adequately delivered, for the long-term benefit of all.

The SDS commissioned a **natural capital baseline** assessment which was carried out by Liverpool John Moores University (LJMU). This includes comprehensive mapping of the City Region’s habitats, as well as of the capacity of the landscape to provide key environmental services, the demand for these services, and the ecological networks that support wildlife. The mapping was used as evidence for the SDS consultation in support of the draft Green Infrastructure and Natural Capital Policy.

A [Natural Environment Investment Readiness Fund](#) (NEIRF) project was undertaken in 2023 by the LCRCA, MEAS, LJMU and consultants. It focussed on developing a model to stimulate local private investment and market-based mechanisms that support nature recovery by helping projects get ready for investment. This project marked an important step to establishing a local nature market for BNG and supports the government’s goals in the environmental improvement plan.

The Liverpool City Region includes six Local Authorities: Halton, Knowsley, Liverpool, Sefton, St. Helens and Wirral. Each Local Planning Authority is at different stages of Local Plan preparation. Throughout LNRS preparations the Local Authorities including planning, greenspace and climate teams have been engaged and contributed positively to this strategy ensuring priorities, measures and the Local Habitat Map are aligned with **Local Plan policy** and their policy maps.

2.3 How was the LNRS developed?

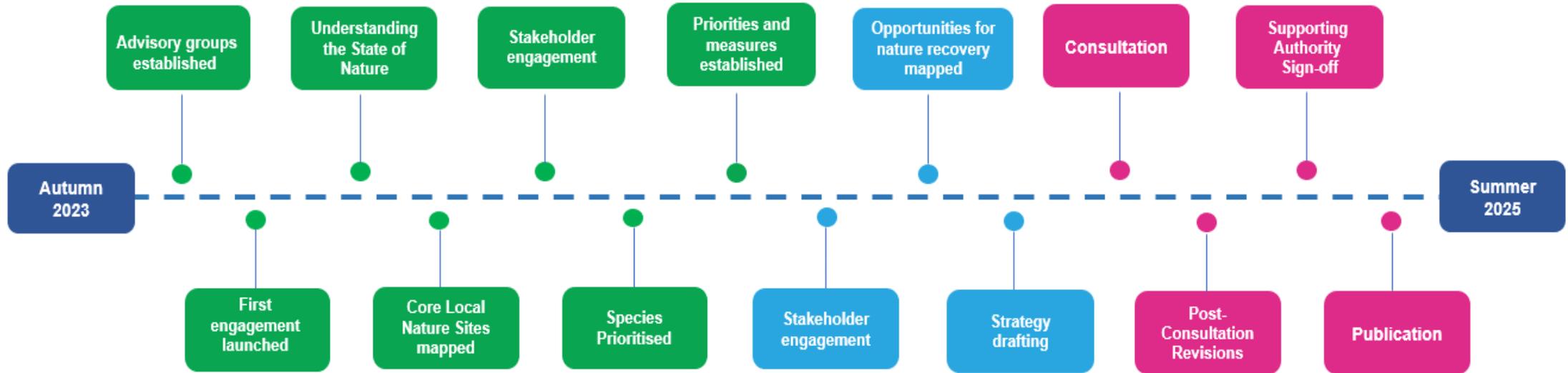
The Liverpool City Region Combined Authority was appointed by Defra as the Responsible Authority for the LCR LNRS and led the preparation of the strategy. It was co-produced with support from Merseyside Environmental Advisory Service, Merseyside BioBank and Liverpool John Moores University, and with support from Natural England, Forestry Commission and Environment Agency.

The evidence-based and locally-led approach incorporated local and national data, local expertise and local opinion: the public and stakeholders from all sectors were involved throughout the process and their feedback was pivotal in shaping the strategy.

The strategy was developed following the statutory and non-statutory guidance provided by Defra and Natural England and took a species-focused approach.

The process assessed the current state of nature across the region, mapped existing core local nature sites, established a set of priorities (goals) and measures (actions) for habitats and species and mapped locations where there are potential opportunities for habitat enhancement and creation that would support species survival and provide wider environmental benefits.

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LCR LNRS development process

Collaboration

The Liverpool City Region Combined Authority thanks every individual and organisation that contributed in any way to the collaborative development of this strategy.

- **Merseyside Environmental Advisory Service** led the Species Technical Group and habitat work, priority and measures development and opportunity mapping.
- **Liverpool John Moores University** led on ecosystem service modelling and decision-making around nature opportunity area selection, and provided expert input on basemap construction and ecological network modelling.
- Local environmental record centres **Merseyside BioBank** and **Cheshire RECORD**, and **Cheshire Wildlife Trust** provided local data and expertise, with Merseyside BioBank taking a lead on species, habitat and opportunity mapping.
- DEFRA arm's length bodies **Natural England**, **Forestry Commission** and **Environment Agency** provided instrumental support and guidance.
- The LNRS **Species Technical Group**, consisting of local experts, provided guidance and expertise on species and habitat prioritisation.
- **Nature Connected**, our Local Nature Partnership, hosted two dedicated LNRS advisory groups (**LNRS Technical Advisory Panel** and **LNRS Advisory Board**) consisting of stakeholders from all sectors who provided regular strategic oversight and invaluable guidance.



- The six **local authorities** of the LCR acted as Supporting Authorities to the LNRS, offering guidance throughout strategy development and providing formal sign-off of the strategy before consultation and publication.
- **Residents** of the Liverpool City Region, and **local stakeholders** from the private, public and voluntary sectors were involved throughout strategy development through a range of workshops and online engagement.

3. Why do we need a Local Nature Recovery Strategy?

Global decline

Biodiversity is the variety of all animal and plant life on earth. **Globally, biodiversity is in serious decline following centuries of habitat destruction.** Since 1970, 70% of mammal, bird, fish, reptile and amphibian populations have been lost¹, however historic declines predating the 1970 baseline far exceed these figures. An estimated 1 million plant and animal species are now threatened with extinction² and these unprecedented, and accelerating losses are the result of human activity. Urbanisation, industrialisation, and intensified food production have resulted in 75% of the terrestrial and 65% of the marine environment being “severely altered”².

Within the UK

The UK has lost nearly 50% of its biodiversity. Centuries of habitat loss have placed it in the top 10% most nature depleted countries in the world³. Nearly 1 in 6 species in the UK are threatened with extinction³.

Local decline

The Liverpool City Region is no exception to this. The region’s post-industrial legacy has left its biodiversity in a state of decline, with human activity causing significant habitat loss and driving species to local extinction. Our remaining habitats are fragmented and often in poor condition, and our positioning as a coastal region leaves us vulnerable to further losses arising from the effects of climate change.

Biodiversity is central to human life on earth. We rely on nature to clean our air, filter our water, provide our food, protect us from the effects of climate change, and for spaces to enjoy for their natural beauty as well as physical and mental health benefits.

The consequences of inaction

Failure to reverse recent biodiversity declines, risks losing these vital ecosystem services that nature provides. The consequences of living in a nature-depleted country are vast, with impacts on wildlife, human health, ability to adapt to climate change, as well as the economy. Degradation of the natural environment could result in a 12% loss to UK GDP⁴. Pollinator insects for example, are “worth millions of pounds to UK agriculture”⁵: their rapidly declining populations pose a serious risk to food security.

What can be done?

However, nature-based solutions, actions which support and draw on nature to provide wider environmental, social and economic benefits while simultaneously benefitting biodiversity, can help us to address many of the challenges we face.

The LNRS is an ambitious and vital opportunity to join-up efforts to protect our natural environment in a way that benefits people and attracts long-term investment into nature recovery. Large scale interventions and individual actions are equally as important and can together connect nature across the region, allowing it to thrive once more.

“When our environment is thriving, we thrive.”
– Halton resident

“We depend on nature, just as it depends on us.”
- Wirral resident

3.1 Biodiversity loss and the climate crisis

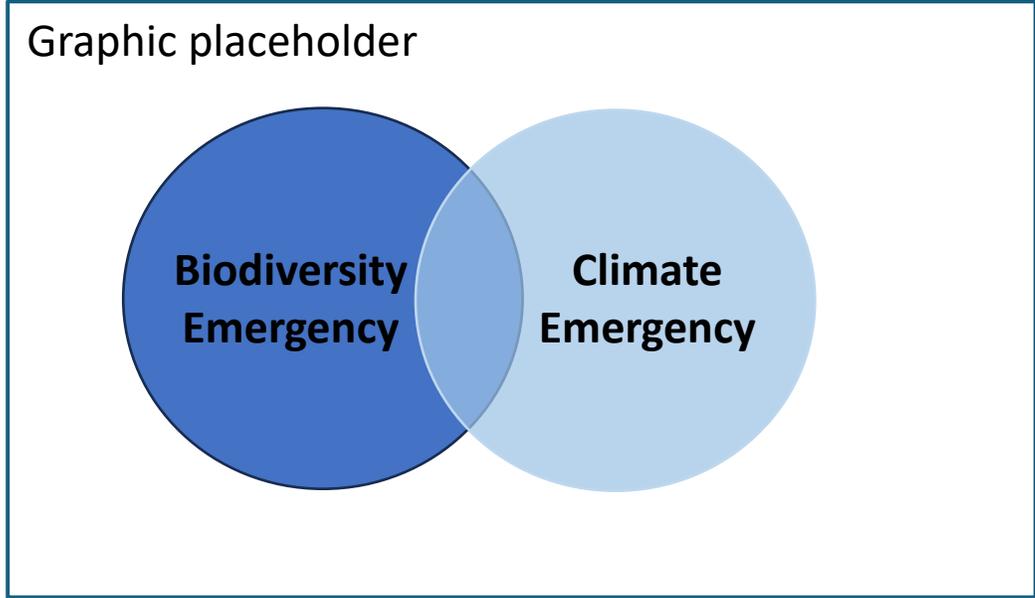
While climate change is well discussed and interventions to address it widely underway, the equally as damaging, rapid declines in biodiversity are often overlooked. However, climate change and biodiversity loss are twin crises that must be addressed simultaneously.

Climate change is one of the pressures causing biodiversity loss, and in turn, biodiversity loss and ecosystem breakdown are accelerating climate change. If mean global temperatures rise by 1.5-2.5 degrees, a third of all species could go extinct¹.

Our peat bogs, woodlands, oceans and wetlands absorb large amounts of carbon from the atmosphere. However, when poorly managed and degraded, these habitats can become sources of carbon emissions.

Nature-based solutions are one of the most cost-effective ways to mitigate and adapt to climate change, reducing vulnerability to its effects and increasing our economic resilience.

The interdependency of climate resilience, and a restored and functional natural environment should not be separated. Climate and ecology are inextricably linked, their success being mutually-dependant on one another.



“Climate change is the pressing issue of the future, and nature is the greatest shield we have to combat it.”
- Wirral resident

“Nature underpins our societal functions and impacts the health of every person in this region. Nothing is more important.”
- St Helens resident

3.2 What do people in the LCR think about nature?

In October 2023, a public engagement survey was carried out to determine which parts of our natural environment are most valued by the citizens of the Liverpool City Region, and what they think should be prioritised in the Local Nature Recovery Strategy. The findings were incorporated into the habitat and species priority setting process (section 6).

Benefits of nature

The wider benefits that nature provides to society are highly valued. **71% of people believe that nature builds resilience to climate change, while 85% of people think that nature benefits mental and physical wellbeing.**

Habitats and species

The species groups that people would most like to see supported by the LNRS are mammals, plants and birds. The red squirrel was popular amongst responders, with 10% of people highlighting it as a priority species in our region. This also links with support for more / better woodland which was high on the public's habitat list along with urban green spaces and coastal areas. Hedgehogs and bats were also well supported.

“Nature helps people see the beauty where they live and feel more connected.”
- Knowsley resident

Common themes that people would like to see prioritised:

-  Urban green spaces
-  Education
-  Community involvement
-  Protected areas
-  Tree planting
-  Access to nature

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Spending time in nature

60% of people surveyed spend time in their gardens on a daily basis while 75% of people visit their park at least once a week. 63% spend time at a nature site within their local authority area at least weekly and 61% visit a nature sites outside of their area at least once a month.

Reasons why:

- to enjoy the natural beauty (78%)
- to improve their mental health (70%)
- to see wildlife (59%)
- to exercise (55%)

“To improve mental health” was the most common response by those under age 35.

“Our natural spaces are of incalculable value in terms of environmental and health resources.”
- Sefton resident

“Nature is what keeps human beings happy and healthy. Without it we lose our sense of well-being. It makes us feel safe, connected and grounded.”
- Halton resident

4. The natural environment of the Liverpool City Region

Lying on the coast of Northwest England, The Liverpool City Region (LCR) is home to just over 1.55 million people. Lancashire lies to the north, Greater Manchester and Warrington to the east, Cheshire to the south and North Wales to the west; all of which have close links and ties with the LCR. Centred around the River Mersey and the port city of Liverpool, it extends to include the boroughs of Halton, Knowsley, Liverpool, Sefton, St Helens and Wirral. Whilst having an urban core, the city region contains large stretches of undeveloped coastline and rural areas comprising a large agricultural land.

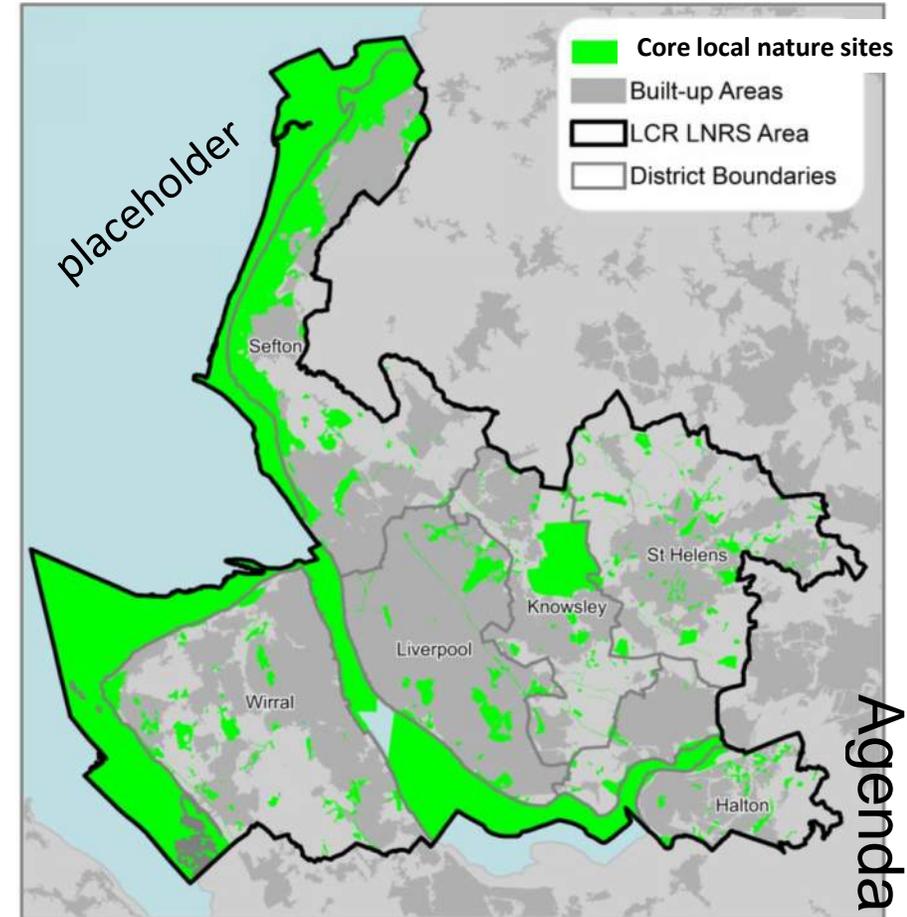
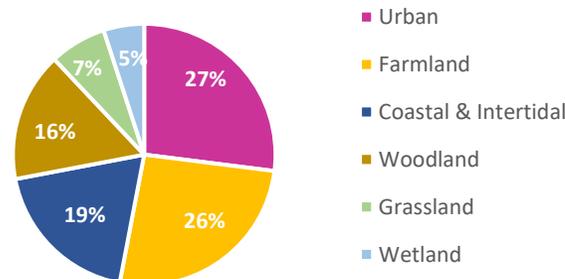
The LCR is rich in natural assets. It has a strong maritime history which brought prosperity to the region through the development of its ports and industries that continue to play an important role in the region's economy today. The varied landscape character contributes to a much-valued sense of place, local distinctiveness and quality of life. Despite historic habitat loss, the region supports 243 of England's priority species¹ (those which are most threatened and requiring urgent conservation action). Long-standing partnerships and local expertise have driven creative conservation and pioneered restoration ecology across the region and beyond.

Approximately 40% of the strategy area (which includes the intertidal zone) is already designated as nature conservation sites, and North Merseyside has the highest density of Local Wildlife Sites in England².

The variety of habitats found across the region are underpinned by a rich mix of soils. These soil types determine the character of the landscape and the habitats found in different areas. Understanding of our local soils is fundamental to the success of habitat restoration and nature recovery.

Similarly, as a region shaped by water, the dependence of our extensive river, coastal and intertidal habitats on good water quality can not be understated. The Dee and Mersey estuaries, for example, form some of the most important sites in Europe for wintering birds.

Strategy area habitat cover



Map of the Liverpool City Region LNRs area showing existing core local nature sites.

- 18 Sites of Special Scientific Interest
- 3 National Nature Reserves
- 388 Local Wildlife Sites
- 29 Local Nature Reserves

Halton is characterised by the upper Mersey estuary which passes through the borough, either side of which is a legacy of heavy industrial development, leaving areas of the surrounding environment highly polluted. Despite this, extensive areas of saltmarsh and mudflat remain and provide habitat for a range of intertidal species.

Many areas of the borough are important for wildlife. Areas of Runcorn and Daresbury contain important old and ancient woodland. The Bridgewater and Manchester Ship Canal as well as Keckwick and Ditton Brook provide important waterbody habitats.

Pex Hill overlooking the Mersey, is the best remaining example of lowland heath in the borough and sites such as Pickerings Pasture in Wirrnes show how restoration of post-industrial sites can benefit both people and nature.

The **Knowsley** area is a mix of urban, farmland and woodland areas and has the greatest area of woodland cover within the City Region. Knowsley is a stronghold for ancient and long-established woodlands, particularly areas like the Knowsley Estate comprising one of the best examples of wood pasture and parkland. In the north and south of the borough the non-urban areas are mostly productive farmland with Ditton Brook and other rivers and streams flowing through the area to the Mersey.

Acornfield Plantation Local Nature Reserve in the north of the borough is one of the only remaining functional bog habitats in the LCR. To the East, this is surrounded by productive farmland underlain by peat which supports many important overwintering birds and other farmland species

Several ex industrial sites including Pex Hill Quarry and Stadt Moers Country Park have seen establishment of high quality habitats including heathland, grassland and woodlands, and now stand as important areas for wildlife.

The **Liverpool** area is highly urbanised, with valuable access to green spaces provided by parks, gardens, allotments and other green spaces. However, the urban environments provide many opportunities for different species and habitats and travel routes such as canal towpaths, the Liverpool loop line and Otterspool promenade provide opportunities for development of linear wildlife corridors.

The city parks are highly valued by residents, supported by local 'Friends of' Groups, and provide important habitat. Some city parks including Sefton, Princes, Otterspool and Calderstones Park are part of the Fields in Trust legal scheme which protects them from development.

The urban environments provide opportunities for species such as hedgehogs, swifts, and peregrine falcons, and the port and docklands along the River Mersey are also important for breeding terns and other seabirds. The urban nature of the landscape means brownfield sites are widespread and support various rare and declining species of plants.



Black darter © Mike Roberts

“The wealth of rare species and important habitats in the LCR gives me pride.”
- Liverpool resident

“It is our duty to value and treasure the natural assets we have and make right on mistakes from our past.”
- St Helens resident



Barn owl © Mike Roberts

The **Sefton** borough is most famous for its coastline. This dune system is the largest continuous sand dune system in England and is sculpted by three estuaries - the Mersey, Alt and Ribble. Habitats found along the Sefton coast include coastal grazing marsh, saltmarsh, sand dune and lowland heathland, notably at Freshfield, and pine woodlands at Formby. These habitats support a range of iconic species including natterjack toad, sand lizard, red squirrel and numerous coastal plants.

Away from the Coast, Rimrose Valley provides a valued green space for south Sefton and the Leeds to Liverpool Canal is an important blue corridor that extends through the borough from the Waterfront. Pit Meadows is a successful example of how river floodplain habitats can be restored and is one of the best locations in the LCR for water vole, tern, owls and raptors.

The River Alt corridor and low-lying farmland is a key feature of the hinterlands flowing from Knowsley through to Hightown and Altmouth. Otter are known to be recolonising the river and other wetland watercourses across the Region

“We must reverse the downward trend in biodiversity as soon as we can.”
- Sefton resident

The **St. Helens** borough is a mosaic of farmland and scattered urban centres. This area is a historical hub of industrial works in the region, and many ex-mining sites have been restored to create spaces for people and nature. Bold Forest Park is a network of collieries that have been transformed into mosaics of wetlands, grasslands and woodlands by the local authority and partner nature conservation groups.

The north of area is characterised by wetlands, peat soils and farmland, supporting large populations of over-wintering pink-footed geese and many other migrating birds. Some fragments of lowland peat bog remain, including Holiday Moss which is currently being restored by Lancashire Wildlife Trust. These habitats provide homes to Willow Tit, a rare and declining bird.

Whilst many of the important nature sites have been reclaimed from industry, there are some remaining long-standing habitats that have remained unchanged for potentially hundreds of years. St Helens contains one of only two non-coastal SSSI grassland sites in the region, Stanley Bank Meadow (the other being Meol’s Meadow in Wirral). Much of the region’s larger ancient woodlands are found in St Helens, including Goyt Hey Wood, Stanley Bank woodland and Rough Hey, which are strongholds for rare species of woodland plants.

The **Wirral** Peninsula is formed between the Mersey and the Dee Estuaries. The landscape is characterised by the urban area on the east and more rural areas on the west comprising former large country estates, farmland, natural coastlines and wooded sandstone ridges cut by deep clough valleys supporting ancient woodland. Much of the habitats found on the Wirral are of national importance and have been designated as SSSI sites including Thurstaston Common, Heswall Dales, Meol’s Meadow, and Dibbinsdale.

Wirral holds many important grassland sites, including Meol’s Meadow SSSI. Other important grasslands in the area include more recently created sites including New Ferry Butterfly Park, Wirral Country Park, and Port Sunlight River Park. All these sites are hugely important for a range of fungi, plants and invertebrates.

Coastal areas of the region hold several important habitats including salt marsh, mud flats and sand dunes. These habitats are nationally and internationally designated for their rare habitats and species. Sites such as Red Rocks SSSI holds a population of natterjack toads that successfully colonised the area after a re-introduction in 1996. To the south of Red Rocks, lies Hilbre Island, a small island that has been used for biological research for many decades and hosts the region’s only population of grey seals.

4.1 Pressures on nature

The natural environment across the LCR has suffered from a history of habitat loss and pollution with habitats and species in the Liverpool City Region following a broad 50-year decline¹. Since 1970, 36 priority species of plants and animals have not been seen in the city region and could be considered locally extinct, with a further 34 species not seen since 1989¹.

Human activity such as land use changes, urbanisation, recreation and pollution have significantly impacted our natural environment. Land in the Liverpool City Region is limited, and prioritisation of the natural environment has suffered beside competing requirements such as housing need, infrastructure, commercial expansion and agricultural demand. Air quality and water quality suffer in urban centres and rural areas alike, with transport emissions, litter and microplastics, run-off from roads and agricultural areas and utilities stretched beyond capacity causing pollution of the natural environment.

We have seen an approximate 5% loss of all terrestrial habitats across the LCR since the 1980s, including a 10% loss of our most wildlife-rich grasslands¹. Heath and bog habitats are fragmented, wetlands in poor condition and our rivers are heavily modified, with less than 1% of river habitat in good ecological status. However, the Mersey Estuary has seen significant improvement through the Mersey Basin Campaign clean-up programme, highlighting our ability to reverse historic damage.

Lowland raised bog, an important carbon store, is critically rare in the region and heavily degraded, making up just 0.02% of all recorded habitat in the LCR¹. Farmland species have declined by approximately 25% and local extinctions have occurred¹. Gaps in the decades-old habitat maps mean these losses are often underestimated.



Historic felling of ancient and long-established woodland has been damaging, and although woodland cover in the LCR has increased by 12% since 2001¹, owed largely to the dedicated work of The Mersey Forest who have planted almost 5.5 million trees in region since 1990, newly planted woodland areas will take decades to mature into a thriving woodland ecosystem. Many existing woodlands remain degraded and unmanaged, with 58% of woodland in the LCR not meeting the Forestry Commission criteria for sustainable woodland management².

Widespread habitat loss has left our wildlife-rich designated sites unevenly distributed across the region, meaning habitat connectivity and species networks are fragmented. Additionally, designated sites are increasingly in unfavourable condition, negatively affected by lack of management or inappropriate management, scrub encroachment, invasive species (particularly Himalayan balsam, Japanese knotweed and rhododendron) and recreational disturbance. Only 25% of our local wildlife sites and 37% of our SSSIs are in favourable condition¹.

Climate change is driving changes to habitats and species range, meaning some species may be forced out of the region, while new arrivals are moving in, along with new pests and diseases. As a coastal region predicted to face sea level rise of up to 1m³, climate change coupled with habitat loss, increasingly threatens species survival and increases our vulnerability to extreme weather events.

4.2 Opportunities for nature recovery

Despite the challenges that our natural environment is facing, the City Region is fortunate to have commitment from many organisations, community groups and individuals who are already undertaking vital work to support nature recovery. Our long-standing partnerships, unrivalled local expertise and innovative ambition provide great potential to collaboratively deliver nature recovery across the region, working towards the shared goals of the LNRS.

As well as identifying opportunities for nature, the LNRS also targets wider environmental benefits, also known as ecosystem services, such as access to nature, flood management and air quality. Highlighting opportunities for nature recovery that also provide benefits for local communities offers an opportunity to engage local people, educate on the importance of the natural environment and harness support. It can help to attract funding from stakeholders who may not be primarily seeking to fund nature and can unlock local 'nature markets': the buying and selling of ecosystem services e.g. carbon credits and biodiversity units.

Our designated sites provide a great opportunity to enhance areas that are already protected for nature. These spaces can be better managed to provide a range of environmental benefits and encourage community engagement with nature through positive actions for wildlife. Buffer zones can be created around these sites to increase resilience and mitigate external pressures and corridors can be created between sites to increase connectivity. By reconnecting our natural assets, we can give wildlife the opportunity to recover and thrive.

Rising average global temperatures, due to climate change, are causing some species to move further north. Species that were previously rare occurrences, are arriving into the area and establishing populations here. This provides us an opportunity to provide alternative habitat locations for these new species in order to avoid extinctions.

DRAFT



“A green region is a more biodiverse, healthier, economically more prosperous region.”
- Knowsley Resident

“Nature can help regenerate the area and improve people’s physical and mental wellbeing.”
- Liverpool Resident

In our **urban** areas there is potential to create well-connected, species-rich grasslands, to maximise green and blue infrastructure and to integrate nature into urban design. Residents of the Liverpool City Region have expressed a strong desire for more urban green spaces and to be involved in nature recovery at a local level. Community involvement should be encouraged, through action in private gardens, transformation and creation of community spaces and participation in nature projects.

Management of ancient and long-established **woodlands** must be improved to restore these sensitive habitats to good condition and to provide space for important species. This management should also extend to more recent woodland, including commercial plantations. Over half the woodland in the LCR is not under sustainable management, and a move towards this through application of the [UK Forestry Standard](#) will both increase the productivity of commercial woodlands and increase the biodiversity of these woodlands. New woodlands should be created with species that reflect locally native woodland habitat types and design should follow the “right tree, right place” approach.

Enhancement of our **farmland** landscape should promote both sustainable, productive farming, and an increase in farmland habitats for wildlife. We must work alongside farmers to encourage participation in environmental schemes, increase collaboration with environmental organisations and create networks of farmers interested in nature-friendly land management.

The **wetland** networks of the region provide many opportunities for habitat creation, enhancement and naturalisation. Our rivers, canals and ponds provide opportunities to create nature corridors through areas that would otherwise be barriers to species movement, and reconnection of our natural floodplains can improve water quality and reduce the risk of flooding. Our wetland habitat networks can create stepping stones stretching across the region, providing refuges for rare and endangered wildlife.

Along the **coast and estuaries**, we can work with nature to provide vital refuges for our rarest habitats and species whilst improving the resilience of our natural coastal defence to sea level rise. Education on the importance of our coastal habitats and their wider benefits will be crucial to encourage people to think about their impact when visiting these much-loved locations.

Enhancement and creation of habitats across the region provides an opportunity to contribute to the national environmental targets set out in the Environment Act (2021) and Environmental Improvement Plan, supporting nature recovery at both a regional and national scale.



Community engagement © Our Dee

5. What's already being done?

For decades, conservation organisations and volunteer groups have been working to protect the natural environment across the region. In recent years, support has widened to include participation from the private and public sector, and collaboration is growing. Innovative, collaborative and award-winning projects within the region are at the forefront of nature recovery.

Lunt Meadows Nature Reserve and Flood Storage Reservoir

Owned by the Environment Agency and managed by Lancashire Wildlife Trust, Lunt Meadows is the largest wetland in Merseyside, home to several rare species such as water vole, bittern and marsh harrier, and yet only 12 years ago it was intensive arable farmland. Its 67 hectares of reedbed, open water and wet grassland are designed to double as a nature reserve and flood storage reservoir, providing refuge for wildlife, protecting communities along the river Alt from flooding and alleviating water pollution.



Lunt Meadows © Alan Wright

Dynamic Dunescapes

Dynamic Dunescapes was a partnership project restoring sand dunes across England and Wales for the benefit of wildlife, people and communities, funded by the National Lottery Heritage Fund and the EU LIFE Programme (2019-2024). Project partners were Natural England, Plantlife, National Trust, Natural Resources Wales, Cornwall Wildlife Trust, Lincolnshire Wildlife Trust and Cumbria Wildlife Trust. The project was based across nine key dune areas, including the Sefton Coast.

Healthy sand dunes need to be free to move and be dynamic. Over many decades, sand dunes, the most threatened habitat in Europe, have become overgrown with vegetation and stabilised, negatively affecting many of our protected dune wildlife that need areas of open sand to thrive. The Dynamic Dunescapes project has brought life back to the dunes by creating areas of open sand, removing scrub and controlling invasive species to improve conditions for some of our rarest dune specialist species to flourish. On the Sefton coast, interventions such as the creation of v-shaped notches, restoration of dune slacks and dune heath and invasive species removal, supported by a community engagement programme, are helping to support sand lizard, natterjack toad, invertebrates and pioneer plants, and are restoring natural dynamic dune processes.



V-shaped notch, Ainsdale © Natural England



Dune heath restoration © Natural England

Leading the way for wildflowers

The UK has lost 97% of its wildflower habitats since WWII¹, but in Liverpool there are now more council wards with wildflower meadows than anywhere else in the UK².

This is thanks to the work of Scouse Flowerhouse, a Community Benefit Society working to co-create an urban mosaic of wildflower habitat across the LCR in partnership with local communities and a wide range of social, environmental, local authority and education partners. Scouse Flowerhouse stems from a strong cultural history of ecological restoration, which started on Lark Lane in 1975 when Landlife was established, and then joined National Wildflower Centre in Knowsley, now joined with the Eden Project.

Continuing to circular economy, National Wildflower Centre harvests seed from sites in and around Liverpool and distributes to local community groups and schools via Scouse Flowerhouse.

Notable projects include: Everton Park which won Kew's Grow Wild England Flagship (2014); Calderstones Nature Reserve which transformed a derelict greenhouse compound into a depot for nature; Lunt Meadows where Landlife pioneered the first soil inversion in the UK; and Regernus' 'Head North For Beauty' which created a mosaic of meadows sown by local children and residents with support from the LCR Community Environment Fund.



© Scouse Flowerhouse



© Mark Loudon for National Wildflower Centre

Our Dee Estuary

Our Dee Estuary is a cross-border partnership project led by Cheshire Wildlife Trust, on behalf of the Tidal Dee Catchment Partnership set up to tackle the intertwining and wide-ranging threats to the Dee Estuary. It aims to create a nature-based sense of place around the Estuary, inspiring coastal communities on the Wirral and in Flintshire and Denbighshire to take stewardship of, and effectively conserve and safeguard the important wildlife of the Dee Estuary. Work with local communities, estuary users, visitors and other partners ensures natural heritage is better managed, better recorded, better interpreted and in better condition.



Natterjack fence © Our Dee Estuary

Sea Buckthorn control Birkdale dunes

Each autumn/winter since 2012, a volunteer group known as the 'Buckthorn Bashers' has worked to control invasive and highly damaging Sea Buckthorn in the sand-dunes at Birkdale Dunes. 3,100 volunteer hours have been worked since 2014, in weekly 2-hour 'bashes' from October to March, protecting this rare habitat.

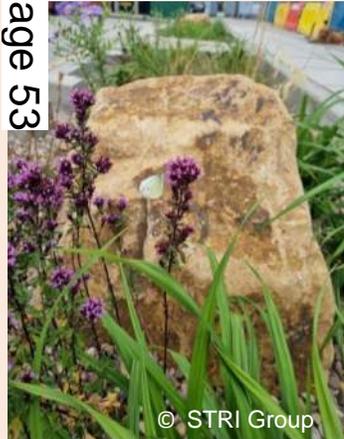


© Philip Smith

URBAN GreenUP¹

An EU funded Horizon 2020 project managed by Liverpool City Council in partnership with The Mersey Forest and University of Liverpool, retrofitted nature-based solutions into urban areas and monitored them for environmental, social, and economic benefits. It has been internationally and nationally recognised with 12 awards for excellence in biodiversity, climate resilience, innovation, planning, place making, community engagement and social outcomes. Schemes include:

- Biodiverse, chemical-free and low maintenance pollinator planting on the Strand using sustainable techniques, reclaimed materials, and organically sourced plants, resulted in an 802% pollinator count increase and stored 4.6 tonnes of carbon. This project won the Landscape Institute Award 2023 for Excellence in Biodiversity, Conservation and Enhancement and the CIRIA Big Biodiversity Challenge 2024.
- A floating freshwater ecosystem island installed in Sefton Park Lake provides valuable habitat, improves water quality and reduces summer blue-green algae.
- A hydroponic-based living green wall on St John's Shopping Centre, irrigated by rainwater from the roof, resulted in an overall 15% positive improvement in air quality, a 21% pollinator increase and temperature reduction of up to 3°C in the vicinity of the wall.
- An urban raingarden comprising three linked planting beds which collectively decrease water flow and volume to drains reducing likelihood of surface water flooding, whilst improving water quality, air quality, biodiversity, street appearance and community engagement.



Roby Field, Knowsley

In 2022 Knowsley Council organised for members of the community and local councillors to plant 6,500 native trees as part of a new native woodland at Roby Fields. The trees were jointly funded by The Mersey Forest Foundation and Veolia, and form part of the wider Mersey Forest. The creation of the woodland is the latest development at Roby Field which has seen a range of improvements in recent years, including new paths, the creation of a wetland area and wildflower meadow.

Acornfield Plantation, Knowsley

In 2023 a habitat restoration project was undertaken by Lancashire Wildlife Trust in partnership with Knowsley Council to restore the mire on site. The project pushed invasive Rhododendron back, creating suitable growing conditions for the established carpets of Sphagnum Moss species and introduced of Common and Hare's-tail cotton grass species. Establishing a more stable water table will encourage the growth of the bog plants and slow the succession of unwanted tree regeneration/scrub.



Mersey Rivers Trust

Natural Flood Management, Alt Catchment

With Environment Agency funding, the Alt Catchment natural flood management (NFM) project, which runs until 2027, will implement a variety of NFM measures throughout the whole of the catchment, from leaky dams in Huyton to sand dune management at Hightown. The project, made possible through the Alt Crossens Catchment Partnership, brings together a wide range of partners including local authorities, NGOs, universities and the local record centre to work together to achieve multiple benefits at a catchment-scale. In 2023, Mersey Rivers Trust led Liverpool University Hospitals NHS Foundation Trust and Friends of Bluebell Woods on a leaky dam installation project within the Bluebell Woods of Ferley Brook. This NFM technique slows the flow of water into the River Alt, alleviating flooding, improving water quality and providing new habitat.



Alt catchment NFM © Mersey Rivers Trust

Headbolt Lane Biodiversity Net Gain

In 2023, before BNG became mandatory, project partners involved in the delivery of Headbolt Lane Rail Station worked with Mersey Rivers Trust and Knowsley Council to ensure that the new station provides a “net positive” biodiversity gain. It is benefitting 6 public parks in Kirkby (including Saxon Green, pictured) with biodiversity improvements including the creation of wildflower meadows, wetland and pond habitats. The project is the first of its kind in the area to trial the BNG metric.



Saxon Green © Knowsley Borough Council

Wirral Council Tree, Hedgerow and Woodland Strategy

In August 2020, Wirral Council adopted their new Tree, Hedgerow and Woodland Strategy, with an ambitious target to double the tree canopy cover on the Wirral by 2030. The strategy has a strong focus on community engagement to achieve the tree planting targets. Since 2020, a net total of 80,594 trees have been planted. In the 2023-24 planting season alone, 8 orchards, 5 micro-woodlands, 460m of hedgerows, and two Trees for Climate woodlands were planted across 13 community planting sessions and 5 school planting sessions, with the help of 190 volunteers. Additionally, 70 council staff got involved in tree planting sessions as part of the Council's volunteering opportunities. A further success of the Council's Tree Strategy is the establishment of the Wirral Tree Warden Network, which has seen more than 100 people sign up to volunteer.



© Wirral Council

Woodland Planting at Factory Lane, Widnes

In 2023 Halton Borough Council created 5000m² of new woodland at Factory Lane, a reclaimed landfill site, designed to accommodate existing walking routes and retain views from the site across the Mersey Estuary. The project, funded by the Liverpool City Region Combined Authority Community Environment Fund, included a community tree planting event and is part of the council's "Big Halton Forest" initiative which aims to create a diverse forest by planting at least one tree per resident in the borough by 2030. Four further sites were planted in 2024 resulting in the creation of an additional 0.97ha of woodland and a further 50 potential sites of varying sizes have been identified for further tree planting throughout the borough.



© Halton Borough Council

St Michaels Eco Park, Halton

Over the past 5 years Halton Borough Council have developed a solar farm on a former golf course in Widnes to provide a renewable energy source for the borough. The project also aims to provide biodiversity benefits on the site by increasing the amount of native hedgerow, diversifying the scrub areas and extending the existing mosaic grassland. Over an acre of traditional native orchard has been planted and wildflower rich grassland has been created within the solar development and in the surrounding area, creating habitat linkages to the existing mosaic.



© Halton Borough Council

New Tree Planting in St Helens

The grow back greener programme is being led by the Woodland Trust in partnership with regional trusts, including the Mersey Forest. In St Helens Borough funding was granted to plant 246 heavy standard trees and a further 8,325 smaller trees in a variety of sites across the borough. The council worked with local horticultural and community groups such as Rainford in Bloom to deliver new trees in their areas, guided by their local knowledge and goals. As part of the project St Helens Council planted specific disease resistant Elm species in the Sankey Catchment as the master trees were dying off from Dutch Elm disease. This aimed to help the population of White Letter Hairstreak butterfly colonies which are under threat.



© St Helens Council

Green Sefton "Give Birds A Break" Campaign

Initiated by Green Sefton, the GBAB Campaign was launched in 2022 to speak to visitors to the Sefton coast, urging them not to disturb roosting or feeding wild birds. Supported by RSPB, Natural England, National Trust and Dynamic Dunescapes, in its first 2 years, 33 volunteers led 42 events and engaged with over 1500 visitors.

The "Shorebirds of the Sefton Coast" booklet was published to support the campaign, backed up by a social media campaign over high tide periods. The approach has since been adopted in Cheshire and at sites around the country.

Volunteering on the Sefton Coast

The Sefton Coast has a long tradition of volunteering. Over 2,800 hours of volunteer work were carried out on the Sefton Coast in 2023 alone, working alongside Green Sefton core staff. Regular activity includes beach cleans, litter picks, scrub removal, survey work of rare species including Natterjack Toad and Sand Lizard and monitoring of winter livestock.



© Sefton Council



© Sefton Council

Mersey Forest

For over 30 years, a diverse partnership of local authorities, organisations, land managers and communities, guided by The Mersey Forest Plan and a landscape-scale approach, has been working to establish, look after, and grow a culture of trees, woods, and other habitats.

The Mersey Forest Plan contains the vision: “More with trees – Acting together to grow tree cover to 30% of Cheshire and Merseyside; intertwining cherished trees with enriched people, flourishing nature, climate resilience, and rekindled hope.”

The Mersey Forest spans nearly 3000 km² across Cheshire and Merseyside and has transformed the landscape into a vibrant mosaic of woodlands, wetlands, grasslands, and hedgerows, with interconnected habitats providing a vital refuge for diverse species. By creating green corridors and stepping stones of habitat, The Mersey Forest ensures that species can move freely, facilitating genetic exchange and increasing resilience to environmental change.

The location and design of new trees and woodlands is guided by the “right tree, right place” principles, and take into account areas of greatest need for people, nature, and climate. New woodlands established also contain open space and other habitats as part of their design.

A notable example of The Mersey Forest’s work is in south St Helens, where the long-term restoration of Bold Moss, formerly dominated by colliery spoil heaps, has transformed the site, significantly improving its biodiversity. This is part of the wider Bold Forest Park programme, with significant funding from Defra, Royal Mail and section 106 agreements as part of the planning system.

Photos
requested

Liverpool City Region Community Environment Fund

Since its launch in 2020, the Community Environment Fund has made £1.35m available to community-based projects across Liverpool City Region, with the aim of supporting communities to engage in a range of environmental activities, encourage long-term behaviour change and improve the environment in the LCR. So far, 92 projects have already been supported by the fund with grants of up to £30,000. These projects have ranged from creation of green space, and biodiversity initiatives such as the Mulgrave Street Community Garden, to food growing initiatives, and educational experiences for young people in nature, including on beekeeping. In the 2022/2023 round of the Community Environment Fund alone, 9,492 m² of new habitat was created, with 17,659 new plants and 4,269 trees planted. Additionally, 8,838 kg of sustainable food was produced, and 102 tonnes of food was diverted from landfill. The latest round of the Community Environment Fund opened in March 2024 and closes on the 31st of October 2024. Assessment of projects and funding allocations for the latest round are still ongoing.



6. What we need to do now

The LNRS aims to join-up efforts for nature on a regional scale, ensuring that we all work to the same goals, in the best interest for nature recovery. Though a set of priorities have been established for each habitat, there are several guiding principles that we should apply across all habitat restoration, enhancement and creation:

It is important to focus on creating habitat networks that are connected at landscape scale and allow species to move freely.



- Apply Lawton approach of 'Bigger, Better, More and Joined-up' spaces for nature



- Follow national regulations and best practice guidance and standards



- Align with national and local plans and policies



- Strive for habitats in good ecological condition



- Follow 'right action, right place' approach



- Optimise wider benefits and ecosystem services



- Plan for long term maintenance



- Build resilience to climate change



- Engage with stakeholders and local communities



- Support collaboration



- Apply existing knowledge and share lessons learnt

restore
enhance
create
collaborate

6.1 Priorities and Measures for Nature Recovery in the LCR

The LNRS establishes a set of evidence-based and locally-led priorities and measures that would best support nature recovery across the region.

Priorities are the long-term goals that the strategy is seeking to achieve. Each priority is accompanied by a set of measures. **Measures** are the practical actions that need to be taken to achieve the goals set out in the priorities. Some of the measures are mapped, in the accompanying local habitat map, to specific locations where they will have a particularly positive impact on local biodiversity, while some measures are unmapped as they could be carried out across large swathes of the region and their benefits felt more widely.

The priorities and measures were developed with an approach focussed on the species that the LNRS could best support. Local species data was used to first create a longlist of species for consideration, based on conservation status and local significance. Species were then shortlisted based on the LNRS's ability to support them through targeted habitat interventions. Shortlisted species were grouped by the collective habitat interventions they require, which form the basis of the habitat priorities and measures, with each priority intended to benefit a wide range of species. The marine environment is beyond the scope of the LNRS and could not be included as a habitat type, however, some marine species are included where they will benefit from coastal and intertidal interventions. Species that require additional, bespoke interventions beyond those in the habitat priorities were separated out into the species priorities found in section 6.8.

The species longlist and shortlist can be found in appendix **X**.



Priorities

These are the end results that the strategy is seeking to achieve.

Priorities are centred around the habitats and species that the strategy will support.



Measures

These are the practical actions that we could take to achieve the priorities.

Measures are focussed on habitat creation, enhancement and restoration but can also contribute to wider environmental benefits.

6.2 Wetlands and Watercourses

Wider environmental benefits

- Beauty and heritage
- Clean air
- Carbon sequestration
- Clean water
- Climate change mitigation
- Flood regulation
- Access for people

We are a region shaped by water, with the River Dee to the south of The Wirral, the River Mersey flowing through the centre, and the River Alt in the north flowing from Huyton to Hightown, at one point forming the border between Sefton and Lancashire. All our rivers are now heavily modified in some way, with less than 1% of our river habitats in good ecological condition (compared to 14% nationally)¹.

Across the region there are many different types of wetland habitat including lakes, ponds, reedbeds, grazing marshes, wet woodland and lowland bogs. The network extends from Lunt Meadows, Rimrose Valley and Marshside in Sefton, Colliers Moss in St Helen's, the more recent reed bed creation in azakerley, and the huge network of farmland ponds in Knowsley and Halton, to Port Sunlight River Park and coastal wetlands along Heswall on the Wirral.

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Our wetland and watercourse habitats are under constant pressure from pollution, invasive species and climate change. However, with careful management, habitats can be restored and recovered for the benefit of both wildlife and people. Along with providing important homes for our wildlife, these wetland networks help prevent flooding, absorb urban, industrial and farmland run-off, and absorb carbon, playing a vital role in climate change mitigation.

Much of the region sits on top of peat soils. These soils are formed when plant material breaks down in wet environments and in the right conditions, forms a habitat known as lowland raised bog. This habitat is one of the most effective habitats for storing carbon, but this once widespread habitat is now critically rare and heavily degraded, forming only 0.02% of habitat cover in the LCR¹. Restoration of this habitat in partnership with farmers and landowners presents a huge opportunity for carbon storage and habitat creation.



6.2 Wetlands and Watercourses

Wetlands are particularly important for:

- Water vole
- Otter
- Bittern
- Marsh Harrier
- Amphibians and reptiles

Our wetland networks are home to a variety of rare and declining species. Water voles, a legally protected species, have disappeared from 94%¹ of their former sites throughout Britain, but are still found across LCR wetlands, rivers and farm ditch networks. Their decline is owed largely to predation by the non-native, invasive American mink which was introduced to Britain in the early 20th century. However, work is being done across the LCR to help save this iconic species and with careful habitat creation and management, we can help recover this species in the region and across the UK. Otter populations are also recovering and regularly use the River Dibbin in the Wirral and Ditton Brooke in Halton and Knowsley.

Our wetland and watercourse priorities focus on what these environments need to best support a wide variety of species and habitats. Poor water quality in all these habitats can dramatically reduce invertebrate populations. Not only are some of these species rare in their own right, but they are also often the main food source for much of the wildlife found in these habitats. Restoring the natural functioning of wetlands and watercourses along with better managing our rarest wetland habitats will create more and varied spaces for threatened species, whilst simultaneously helping to reduce flood risk and store carbon.



Bittern © Mike Roberts



Otter © Mike Roberts



Port Sunlight River Park © Emma Galbraith

Wetlands and Watercourses

Priorities 1- 4

1. Improved water quality and water management in our wetlands and water bodies.

Why

To increase biodiversity, resilience to climate change and the natural beauty of our blue spaces.

How (Measures)

1a. Creation of reedbeds, wet and riparian woodland, coastal and floodplain grazing marsh, and other wetlands to promote natural processes.

Delivered by: Removal of artificial river structures and forms, use of natural flood management methods to create habitats, and targeted habitat creation for priority species.

1b. Creation of settlement ponds, reedbeds and tree or shrub barriers in areas with high pollutants and run-off to improve water quality.

1c. Restoration of natural floodplains, reedbeds, wet and riparian woodland, coastal and floodplain grazing marsh, other wetland habitats and river morphology to promote natural processes.

Delivered by: Removal of artificial river structures and barriers, use of natural flood management methods to manage habitats, and targeted habitat creation for priority species

2. Well-connected, naturally functioning networks of wetland, pond and river habitats in good ecological condition.

Why

To increase biodiversity and mitigate the impacts of climate change, such as flood risk, for species and communities.

How (Measures)

1a*. Creation of reedbeds, wet and riparian woodland, coastal and floodplain grazing marsh, and other wetlands to promote natural processes.

Delivered by: Removal of artificial river structures and forms, use of natural flood management methods to create habitats, and targeted habitat creation for priority species.

2a. Tree establishment along riparian corridors to provide shading, pollutant removal and to promote habitat diversity, following the 'right tree right place' approach.

2b. Creation of new pond networks and associated habitats.

Delivered by: Restoration of ghost ponds and floodplain connections, creating ponds to reinforce existing networks, and creation of new pond networks with different sizes and structures

2c. Management of existing ponds as a mosaic of habitats from new ponds to late succession ponds that are transitioning to other habitats.

1c*. Restoration of natural floodplains, reedbeds, wet and riparian woodland, coastal and floodplain grazing marsh, other wetland habitats and river morphology to promote natural processes.

Delivered by: Removal of artificial river structures and forms, use of natural flood management methods to manage habitats, and targeted habitat creation for priority species

Wetlands and Watercourses

Priorities 1- 4

3. Where appropriate, barrier-free watercourses for the benefit of riparian mammals, migratory fish and other wildlife.

Why

To improve ecosystem quality and function, promote natural ecological and hydrological processes and reconnect aquatic habitats.

How (Measures)

3a. Increased river and estuarine access for wildlife.

Delivered by: Weir removal where possible, improvement of existing riverine species movement infrastructure such as fish passes and ladders and creation of bypass channels.



Lunt Meadows © Mike Roberts

4. Restored lowland raised bogs, wet woodlands and fens under good management.

Why

To mitigate climate change, store carbon, reduce flooding risk, improve water quality, and support specialist species.

How (Measures)

In line with the Defra 'decision support framework for peatland protection and re-establishment of existing woodland on peatland'.

4a. Create hydrological and ecological buffers around core lowland raised bog and fen habitats, stabilising peatland hydrology and mitigating external pressures.

Delivered by: Creation of appropriate habitat surrounding core peatland habitats. These can include lagg fens and wet woodlands in line with the Defra Decision Support Framework for trees and peat. Appropriate interventions will be context specific, seek input from specialist experts when designing interventions.

4b. Restoration of peatland habitats.

Delivered by: Removal (with licence) of young birch, appropriate drainage management, introduction and establishment of peat-forming species such as Sphagnum mosses, buffering of habitats.

4c. Management of existing woodland on peat towards a more wet woodland structure.

6.3 Coastal & Estuarine

Wider environmental benefits



Flood regulation



Clean water



Climate change mitigation



Access for people



Beauty and heritage

As a coastal city region, much of our wildlife and history centres around these dramatic environments. Our coasts and estuaries are recognised as both nationally and internationally important for wildlife and form 66% of our designated sites network¹. These designations protect networks of sand dunes, saltmarsh, mudflats, clay cliffs, dune grassland and other habitats which provide homes for specialist plant and animal species as well as providing important refuges for migrating and wintering birds.

The Sefton and Wirral Coastlines are internationally recognised mosaics of different habitats, with the Sefton Dune system forming the largest dune system in England. However, these sensitive habitats are at risk of being lost to overgrowth of coarse vegetation and shrub, invasive species, climate change, pollution and recreational pressure. Some species found here are only found at a few locations in the UK, such as Baltic rush and the Northern Dune Tiger Beetle, and without careful management, many of these habitats and the species they support could disappear from our coastlines.

The Mersey, Alt, Ribble and Dee estuaries provide year-round habitats for many different species and are internationally recognised for their importance to global bird populations. Over winter, both estuaries support internationally important numbers of wintering birds, including shelduck, teal, northern pintail, redshank and dunlin that feed on the mudflats along the estuary. These populations need high invertebrate numbers to feed off, so good water quality is extremely important in these habitats. The estuaries also support a variety of fish species including sea lamprey and the critically endangered common eel, and marine mammals such as grey seal and harbour porpoise are regular visitors.



North Wirral Coastal Country Park © Emma Galbraith



Stonechat, Leasowe Bay © Ayla Thompson



Natterjack toad, Ainsdale © Philip Smith

6.3 Coastal & Estuarine

Coasts and estuaries are particularly important for:

- Migrating birds
- Dune plants
- Natterjack toad
- Northern dune tiger beetle

The beauty of our coastlines attracts visitors from across the north-west and beyond, and the open spaces along our estuaries are heavily used by local people for recreation and the health and wellbeing benefits that these spaces provide. However, these environments are also vitally important for wildlife. Pressure from ever-increasing visitor numbers means some species are suffering from regular disturbance.

Migrating birds visit our coastlines in autumn and winter to feed and rest on long journeys across the world, but regular disturbance of flocks can impact their chances of survival. Many forms of disturbance affect our local wildlife, and it is everyone's collective responsibility to try and enjoy these valuable habitats in ways that benefit both people and the species we share them with.

As the LNRS is limited to the low water mark, our coastal priorities don't extend into Liverpool Bay. However, many of the priorities within this section will have positive effects on the marine environments around the LCR. This strategy recognises the need for a mosaic of habitats across these environments to maximise biodiversity, along with improvements in water quality across all habitats. The effects of recreation are felt across all coastal and estuarine habitats, and the priorities reflect a need to strike a balance between promoting sustainable visitor access and protecting the sensitive habitats and species they support.



Coastal & Estuarine

Priorities 5- 9

5. Sensitively managed, interconnected and dynamic coastal habitats: promoting natural processes, varied and biodiverse habitats, and a resilient coastal landscape.

Why

To increase biodiversity, mitigate climate change, maintain protected sites and increase habitat availability and diversity.

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How (Measures)

5a. Further creation of notches along suitable dune habitats.

5b. Safeguarding and conservation of important breeding and roosting bird populations.



Delivered by: Seasonal fencing of areas, public education campaigns.

5c. Maintenance and improvement of the mosaic of coastal habitats along the coastlines in-line with any existing SSSI management plans. Promote dynamic natural processes and opportunities for species dispersal under climate change.

Not mapped

5d. Co-ordinated grazing across the coast to ensure habitats are correctly managed and stocked with the appropriate levels of livestock.

6. Appropriate management of coastal and estuarine recreation.

Why

To relieve pressure on nature and prevent erosion, while providing opportunities to connect people with nature.

How (Measures)

In alignment with any future mitigation strategies.

5b*. Safeguarding and conservation of important breeding, feeding and roosting bird populations.



Delivered by: Seasonal fencing of areas, public education campaigns.

6a. Creation and improvement of suitable alternative natural greenspaces to the coast.

Not mapped

6b. Implementation of disturbance mitigation measures including any set out in future local mitigation strategies.

Not mapped



Delivered by: installation of fencing, barriers and board walks to direct traffic away from high sensitivity areas, fencing and barriers to protect areas sensitive to disturbance including ponds, dune slacks and intertidal habitats using a zoned and seasonal approach.

Agenda Item 6

Coastal & Estuarine

Priorities 5- 9

7. Improved water quality within the marine, estuarine and intertidal areas.

Why

To increase biodiversity and provide more accessible natural spaces for responsible recreation.

How (Measures)

1a*. Creation of reedbeds, wet woodland, coastal and floodplain grazing marsh, and other wetlands to promote natural processes.

Delivered by: Removal of artificial river structures and forms, use of natural flood management methods to create habitats, and targeted habitat creation for priority species.

1b*. Creation of settlement ponds, reedbeds and tree or shrub barriers in areas with high pollutants and run-off to improve water quality.

1c*. Restoration of natural floodplains, reedbeds, wet woodland, coastal and floodplain grazing marsh, other wetland habitats and river morphology to promote natural processes.

Delivered by: Removal of artificial river structures and forms, use of natural flood management methods to manage habitats, and targeted habitat creation for priority species

8. High quality estuarine and intertidal habitats, with functionally linked land in good condition.

Why

To improve access for migratory species incl. fish and birds, and increase protection of high tide roosting, feeding and breeding locations for estuarine birds.

How (Measures)

8a. Expansion and creation of saltmarsh and other intertidal habitats.

Delivered by: Use of "fringe" salt marshes along edges of the estuary to allow for shelter and passage for fish, focusing on areas where "managed realignment" or "let nature take its course" is identified in the shoreline management plan.

8b. Management of salt marsh and other intertidal habitats to better reflect the natural processes and morphology.

Delivered by: Creek and other drainage management on drying salt marshes or other appropriate management.

8c. Creation of artificial habitats on hard engineering and infrastructure to create more habitat for estuarine and coastal species.

Delivered by: Vertical rock pools, textured tiles

8d. Removal of abandoned boats along coastal areas of the region.

8e. Sensitive long-term management of functionally linked land - maintaining open grassland and farmland with areas of standing water, with minimal disturbance in the winter.

8f. Allow natural regeneration of salt marsh and other important intertidal habitats where they start to develop and mitigate external pressures where they occur.

8g. Seagrass habitat restoration and reintroduction where appropriate.

Coastal & Estuarine

Priorities 5- 9

9. Clay cliffs in good habitat condition that are allowed to follow their natural processes.

Why

To increase biodiversity, promote natural processes and safeguard sensitive species

How (Measures)

Ensuring compatibility with the shoreline management plan.

9a. Improved management of clay cliffs.



Delivered by: Scrub and fly-tipping removal, better control of surface water run-off at clay cliffs and allowing natural erosion where compatible with shoreline management plans



Crosby beach © Emma Galbraith

6.4 Grasslands and Heathland

Grasslands are particularly important for:

- Waxcap fungi
- Pollinators
- Orchids
- Ground nesting birds

The LCR contains many different types of grassland, and whilst they can sometimes look similar, they form a hugely diverse network of habitats that provide a home for many rare and important species such as orchids, fungi and nesting birds. Wildflower-rich grasslands are critically important for pollinators such as bees, butterflies and hoverflies, and these vibrant meadows can transform the appearance of local areas.

Since the 1980s these valuable habitats have declined by at least 10% across the region, and as much as 14% in Wirral¹, largely due to development pressure causing fragmentation and lack of management resulting in scrub encroachment: species-rich grasslands need to be mown one to three times a year to maintain their diversity.

There are several large, well-connected areas of species-rich grasslands within the LCR, including The Sefton Coast, Sankey Valley and Bold Forest Park. These grasslands as strongholds for rare and endangered plants, animals and fungi. Other smaller, but equally important grasslands such as Pickering's Pasture in Halton and Childwall Fields in Liverpool are more fragmented within urban and farmland environments. However, these smaller, isolated sites could be linked by planting wildflowers in gardens, public spaces, roadside verges and along active travel routes.

Amenity grassland (open grassland used by the public for recreation) in parks and other open spaces, often people's only access to nature, is typically not very biodiverse. However, along with serving as important spaces for recreation and relaxation, these spaces can also be used to support biodiversity and to connect fragmented habitats. Community involvement in wildflower planting can help local people to understand the importance of making spaces for wildlife while also adding natural beauty to the local area.

Wider environmental benefits



Climate change mitigation



Carbon sequestration



Pollination



Soil health



Access for people



Beauty and heritage



Hornet mimic hoverfly © Mike Roberts



Large white butterfly © Mike Roberts



Pickerings Pasture © Halton Borough Council

6.4 Grasslands and Heathland

Heathlands are particularly important for:

- Heather
- Reptiles
- Cuckoo
- Nightjar

The UK holds around 20% of Europe's heathland¹. Heathlands are home to many specialist insects and ground-nesting birds and also provide resilience to climate change. They absorb and store large amounts of carbon and their dense plant growth can regulate water flow, helping to reduce flooding during heavy rainfall.

The LCR has a small but important number of Heathland sites including Bidston Hill and Thurstaston Common on The Wirral, Cressington Heath in Liverpool, Freshfield Dune Heath in Sefton, and Runcorn Hill Heath. Whilst recent local heathland loss has been limited, the heathland we do have is highly fragmented and by far the rarest broad habitat type in the LCR 1. All of our heathland is degraded to some extent by scrub encroachment and at risk of further damage if not properly managed.

Species such as poppies and cornflowers are found in disturbed ground such as farmland, and don't naturally occur in grasslands, but are often included in "wildflower" seed mixes because of their attractive coloured flowers. Whilst these commercial mixes can make attractive displays in public parks and gardens, they do not reflect the native grasslands found in our area. To create and restore important grassland and heathland habitats, native, locally sourced plant seeds that are reflective of the mix of grassland species found in natural forms of the habitat should be used.

The LCR priorities for grassland recognise the need for both more appropriate, and increased management of species-rich grasslands and heathlands to maintain their diversity. Across the region it is also important to create new grasslands to buffer and connect existing habitats and improve our grassland network. Within urban environments species-rich grasslands should be managed and created along travel routes such as cycle paths and towpaths, as well as in parks and gardens. To support these aims, more sources of locally native grassland seed should be found and created.



Thurstaston Common © Ayla Thompson

6.4 Grasslands and Heathland

Priorities 10 - 13

10. Existing species rich grasslands in good habitat condition.

Why

To benefit biodiversity, especially grassland invertebrates, and to promote pollination and seed dispersal.

How (Measures)

10a. Species rich grasslands managed to increase species diversity.

Delivered by: Cutting grass 1-3 times per year and ensuring grass cuttings are removed from site, reintroduction of low-level grazing on grassland sites, management of neglected grasslands to restore them to good condition including turf stripping and scrub removal.

10b. Areas with high numbers of waxcap fungi targeted for grassland management including cut and collect.

Unmapped measure

10c. Reduction in grazing intensity on grasslands and hay meadows where possible.



11. Creation of new, well-connected grassland networks.

Why

To support pollinators and grassland invertebrates, provide people with access to nature, provide natural beauty and to buffers species-rich sites.

How (Measures)

Measures

11a. Creation of new grasslands across the region.

Delivered by: Targeting infertile soils and substrates for grassland and heath creation with a recognition of importance of soil type and structure within grasslands, creation of permanent grasslands for carbon capture using biochar and other novel systems, targeting creation to connect existing grassland, creating wet grassland on seasonally inundated & wet impermeable soils.

11b. Use of roadside verges, railways and other linear infrastructure to connect areas of biodiversity, and aid movement of key species.

Delivered by: Reduction in mowing to once or twice a year and collecting cuttings, and re-seeding areas with local, native species to increase grassland diversity

11c. Creation and management of grassland in urban areas in partnership with local communities and schools.

Delivered by: Pocket parks, parklets, local group creation and participation, promotion of wildlife friendly gardens and no mow May.)



6.4 Grasslands and Heathland

Priorities 10 - 13

12. Greater use of native and local wildflowers in habitat restoration and urban regeneration projects, using local provenance seeds and plants.

Why

To increase native biodiversity, support pollinating insects, enhance aesthetic value and connect people to nature in urban environments.

How (Measures)

12a. Increased use of local, native seed sources in new grassland creation.

Delivered by: Increased cut and collect management of well-established local meadows to provide local sources of green hay. Increased availability of cut and collect and seed drying facilities to provide local, native seed

Not mapped

13. Restored, buffered, and interconnected heathland sites under good management

Why

To increase biodiversity, increase resilience to climate change and other external pressures and provide access to nature for people.

How (Measures)

Measures

13a. Buffering and expansion of existing heathland and targeting of infertile soils and substrates for new grassland and heath creation to connect sites.

13b. Improved heathland management.

Delivered by: Restoring low-level grazing, scrub and leaf litter removal, targeted tree management, climate resilience management such as the use of fire breaks, removal and mitigation of nutrient pollution, drainage management as appropriate, buffer zone creation.

6.5 Woodlands and Trees

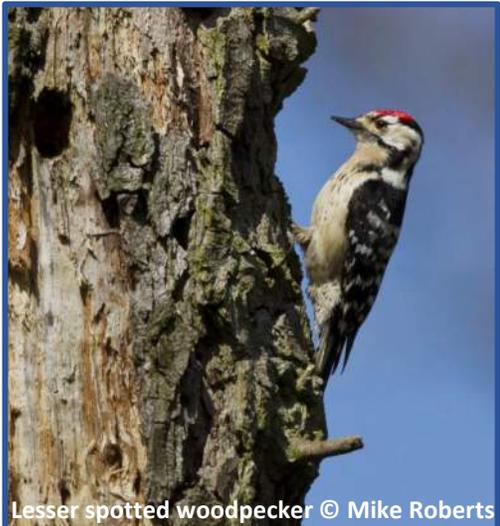
The Liverpool City Region is home to a range of different woodlands that support many different threatened and declining species, such as lesser spotted woodpecker, red squirrel and many different bat species such as soprano pipistrelle, noctule and brown long-eared. While all other terrestrial habitat types have suffered declines across the region, woodland cover has increased by 12% since 2000¹. However, long term management remains a challenge. Only 41% of all woodland in the LCR region is being sustainably managed² to a standard for biodiversity which complies with or exceeds the UK Forestry Standard. This means that 59% of woodland could benefit from implementing sustainable management practices, including biodiversity positive action.

Our ancient woodlands and parkland have existed since at least 1600, with many likely much older than this. Whilst wholesale losses since 1900 have been low due to the protection this habitat is already given, the ancient woodlands within our region are highly fragmented. The most significant remnant areas are found in Dibbinsdale, the Sankey Valley, and pockets in south Liverpool and Runcorn. These woodlands support many important species such as bluebell, wild garlic and wood anemone. Ancient woodlands require careful management to maintain the mix of micro habitats found within them: many woodland plants are slow spreading and sensitive to disturbance. Management of these sites often presents logistical challenge, due to location and this can diminish the desire of owners to actively manage these sites for economic reasons.

Ancient and veteran trees across the region provide homes for many different birds, insects and mammals. These trees and their successors need careful conservation to keep them healthy and thriving for many more hundreds of years. Calderstones Park in Liverpool is home to "The Allerton Oak", an oak tree with a circumference of over 7 meters, thought to be 550-700 years old.

Wider environmental benefits

- Flood regulation
- Climate change mitigation
- Clean air
- Carbon sequestration
- Clean water
- Access for people
- Soil health
- Beauty and heritage



6.5 Woodlands and Trees

- Woodlands are particularly important for:
- Bluebells
 - Wild garlic
 - Bats
 - Lesser spotted woodpecker
 - Red squirrel

Newer woodlands, including commercial planting, also often suffer from lack of appropriate management. Without management, trees planted at the same time will all grow at roughly the same rate and produce woodlands of a single height and high densities of trees. Woodlands with low structural diversity are not very resilient. To combat this, management methods such as continuous cover forestry and other methods should be used from the start of woodland creation to develop diverse forest structures that are both productive, if necessary, but also create the largest diversity of habitats for woodland species. Woodlands are highly valued by residents of the Liverpool City Region, and access to public woodlands should be facilitated where appropriate.

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Along with our older trees, we have many tree-lined avenues and individual street trees in our urban areas. These street trees can help keep our cities and parks cooler in increasing global temperatures and provide valuable habitat corridors for many different species. Trees absorb carbon dioxide and pollutants from the air, improving air quality, mitigating climate change and creating healthier places for people to live and work. Street trees can also help to reduce the likelihood of flooding by soaking up rainwater and slowing the flow.

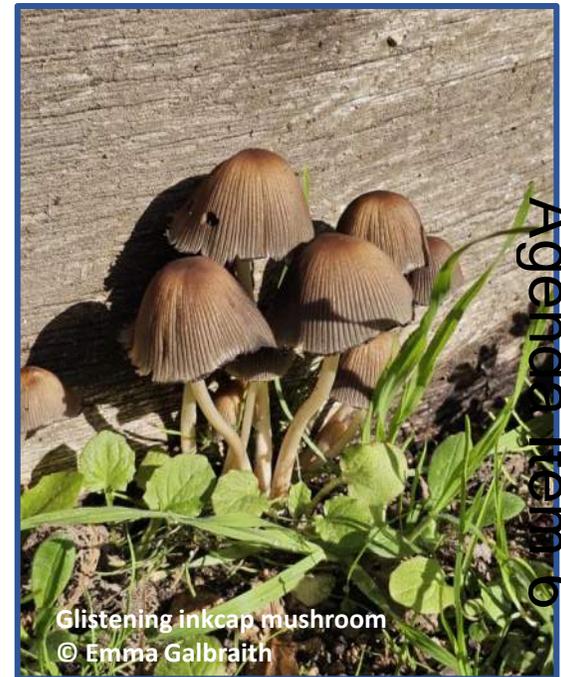
Whilst we must conserve the woodland we already have, much of our historic woodland has been lost to changes in land use. Restoring historic woodland sites, where possible, along with planting new areas in suitable locations can help connect fragmented existing woodland, provide new habitat for woodland species and contribute to the national target to increase woodland cover from 14.5% to 16.5% by 2050. The woodland priorities show the importance of both preserving and creating habitat. Whilst it's easy to think that simply planting more trees is the answer, the need for long-term consistent management across all types of woodland is vital for woodland survival function.



Royden Park © Halton Borough Council



Long-eared owl © Mike Roberts



Glistening inkcap mushroom © Emma Galbraith

Agenda Item 6

Woodlands and Trees

Priorities 14 - 16

14. Tree and woodland management to promote age, species and structural diversity.

Why

To increase resilience, capture carbon, increase biodiversity, improve air and water quality and provide people with access to nature.

How (Measures)

14a. Management of planted and younger woodland for wildlife.

Delivered by: leaving and creating standing dead wood and scrub, pest control, appropriate installation of bird and bat boxes and artificial veteranisation of younger trees.

15. Creation of climate, pest and disease resilient scrub and mixed woodland following the “right tree, right place” approach.

Why

To restore lost woodlands, connect habitats, increase resilience and provide benefits for people, nature and the climate.

How (Measures)

2a*. Tree establishment along riparian corridors to provide shading, pollutant removal and to promote habitat diversity, following the 'right tree right place' approach.

15a. Creation of new woodlands and scrub through planting and natural regeneration.

Delivered by: Planting climate resilient, ideally native tree species, planting of scrub blocks for willow tit around new woodlands, invasive species control to improve woodland establishment, targeting historically wooded areas for new woodland creation with reference to the Mersey Forest Plan.

15b. Planting of woodland mosaics incorporating other habitats into woodland design including wetlands, grasslands and wood pasture/parkland.

Not mapped

Woodlands and Trees

Priorities 14 - 16

16. A network of well-connected and protected ancient, long-established woodlands and veteran trees under favourable management, buffered through natural regeneration and appropriate planting.

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Why

To increase resilience, capture carbon, increase biodiversity, improve air and water quality and provide people with access to nature.

How (Measures)

Measures

16a. Buffered and connected ancient woodland and veteran trees. 

Delivered by: Natural regeneration and planting around existing woodlands, connecting of woodlands through hedgerows, hedgerow trees and other suitable corridors.

16b. Maintaining the natural structure and function of woodlands through suitable management practices. 

Delivered by: Thinning, coppicing, restocking, creation of rides, retention of deadwood, invasive species control, deer grazing management and management of recreational pressure.

16c. Conservation of wood-pasture and parkland. 

Delivered by: Grazing, conservation of veteran trees, identification and conservation of "successor" native trees, or planting of such trees and other management where necessary and appropriate

16d. Restoration of Planted Ancient Woodlands. 

Not mapped

Delivered by: Gradual restoring of remaining native woodland through native regeneration or replacement of non-natives with a woodland mix representative of local native woodlands. Other suitable management with reference to the "Managing Ancient and Native Woodland in England" guidance set out by Forestry Commission.

16e. Management of recreational pressure. 

Delivered by: Creation of specific footpaths, fenced off areas, interpretation and signage.

DRAFT

* indicates that this measure is a repeat from a previous priority that also relates to this one.

Agenda Item 6

6.6 Urban

The urban environment is particularly important for:

- Bats
- Hedgehog
- Swifts, Swallows, House martin
- Peregrine falcon

Wider environmental benefits



Climate change mitigation



Clean air



Carbon sequestration



Clean water



Access for people



Flood regulation



Beauty and heritage

The region's industrial history has both intentionally and inadvertently created spaces for nature amongst the urban landscape. Whilst you may not traditionally think of urban areas as hotspots for wildlife, nature is highly adaptable, and many species are thriving in these environments. Our tall high-rise buildings have become home to peregrine falcons and swifts, swallows and house martins are today almost entirely reliant on houses, barns and other buildings to build their distinctive cup-shaped nest sites. Historic industrial works such as coal and sand mining sites have been colonised by a huge variety of plant and animal species, resulting from the low nutrient soils and sediments brought to the surface which provide important habitats.

Our public parks and greenspaces were created for people, but also provide vital habitat for local wildlife. Parks, allotments, other urban green spaces and linear corridors (cycle paths, roads, canals) can function as both refuges for wildlife in urban areas and serve to connect more isolated sites to allow wildlife to move more freely throughout the region. Work is being done already to create pollinator corridors across the region and community-based urban-greening projects are working to connect people with nature.

Whilst brownfield sites are prioritised for development, built sites that have fallen into disuse are becoming reclaimed by nature. These sites provide a mosaic of different micro habitats that are important homes to a variety of insects and plants: some of which, for example slender thistle, are very rare within the region and almost entirely restricted to brownfield sites. Where it is possible to do so, retention of these sites would maintain valuable habitat, and with careful design and appropriate management, they can also function as open spaces for people.



Peregrine falcon, Widnes © Mike Roberts



Swallow, Oglet Shore © Mike Roberts



Everton Park © Scouse Flowerhouse

6.6 Urban

Nature-based solutions can be used in urban areas to address some of the challenges we face, such as flooding and air pollution, while simultaneously providing health and wellbeing and biodiversity benefits. Liverpool City Council's award-winning URBAN GreenUP project has shown the vast environmental, social and economic benefits that nature-based solutions can provide in the urban environment.

Community engagement and individual action is also vital to urban nature recovery. Lots of small actions in gardens, balconies, windowsills and community spaces can collectively have a big impact, providing refuge for wildlife and increasing connectivity across the region. Everyone can do something to support nature.

The priorities set out in this section focus both on the need for landscape-scale networks and changes to modern urban design as well as the importance of local community action. Many of the priorities and measures are applicable across the entirety of our urban areas, rather than targeted to specific locations, and as such were not able to be mapped. However, this should not discourage local communities from creating spaces for nature: the unmapped measures provide overarching aspiration and guidance for the urban environment.

Many of our urban areas already provide important opportunities for wildlife to co-exist with humans and with careful planning, design and appropriate management, future urban spaces can function as important habitats.



Find out how you can help nature to recover in section 8.



Urban

Priorities 17 - 21

17. More high quality and interconnected green and blue infrastructure in urban areas designed in collaboration with communities.

Why

To improve aesthetic value, reduce the impacts of climate change and maximise access to nature and the wealth of health and wellbeing benefits it provides.

How (Measures)

11b*. Use of roadside verges, railways and other linear infrastructure to connect areas of biodiversity, and aid movement of key species.

Delivered by: Reduction in mowing to once or twice a year and collecting cuttings, and re-seeding areas with local, native species to increase grassland diversity

17a. Wildlife-friendly management of existing blue infrastructure such as SUDS and canals.

Delivered by: Removal of invasive species, planting native plants, ensuring water supply is correctly managed.

17b. Creation of blue infrastructure such as SUDS, ponds, canals and urban river restoration to mitigate pollution.

17c. Planting of climate resilient urban woodland and street trees that provide shade and sources of food for wildlife (ideally locally sourced, native trees such as rowan, hawthorn, crab apple).

17d. Creation of wildlife rich-spaces in towns, cities and villages.

Delivered by: Native wildflower meadows, making space for water, orchards and mini woodlands in community spaces and gardens, allotment creation and installation of wildlife boxes.)

18. Nature at the heart of urban design and planning, delivering Net Gain for biodiversity on or close to development sites.

Why

To promote nature recovery locally and maximise the wider benefits that it provides for our health, wellbeing and prosperity.

How (Measures)

17a*. Wildlife-friendly management of existing blue infrastructure such as SUDS and canals.

Delivered by: Removal of invasive species, planting native plants.

18a. Installation of biodiversity enhancements in new developments.

Delivered by: Installation of bat and bird boxes into new buildings, creation of 'hedgehog highways' through gardens and parks, dark corridors for bats using sensitive lighting methods, bug hotels, use of green and brown roofs and walls. Wildlife-friendly planting of trees, shrubs and herbaceous material.

17b*. Creation of blue infrastructure such as SUDS, ponds, canals and urban river restoration to mitigate pollution.

* indicates that this measure is a repeat from a previous priority that also relates to this one.

Urban

Priorities 17 - 21

19. A network of well-managed, valued and interconnected open mosaic habitats on brownfield land, where appropriate.

Why

To support for the rare species found in these habitats and provide open spaces for people to enjoy.

How (Measures)

In alignment with agreed urban regeneration priorities in local plans.

19a. Creation of new open mosaic habitat sites on brownfield to connect existing habitats.

Delivered by: landscaping and using novel techniques to create 'aesthetic' brownfield, scheme of public education to increase awareness of the importance of brownfield sites.

19b. Management and retention of brownfield and open mosaic sites in line with local plan policy.

Delivered by: Scrub removal, turf stripping and other appropriate management, landscaping to create 'aesthetic' brownfield, scheme of public education to increase awareness of the importance of brownfield sites, maintaining important habitats on mature brownfield sites.

20. A region-wide co-ordinated network of functional nature corridors and greenways for urban wildlife.

Why

To support urban biodiversity, enhance public spaces and encourage community action.

How (Measures)

17c*. Planting of climate resilient urban woodland and street trees that provide shade and sources of food for wildlife (ideally locally sourced, native trees such as rowan, hawthorn, crab apple).

17d*. Creation of wildlife-rich spaces in towns, cities and villages.

Delivered by: Native wildflower meadows, making space for water, orchards and mini woodlands in community spaces and gardens, allotment creation and installation of wildlife boxes.

20a. Greening of active travel routes such as cycle paths, canal footpaths etc.

Delivered by: Re-seeding and over-seeding of grasslands, cut and collect and reduced mowing, invasive species control, tree and scrub planting, wetland and pond creation

20b. Joined-up, co-ordinated community engagement projects within streets and neighbourhoods to create corridors and spaces for nature.

Urban

Priorities 17 - 21

21. Increased use of ex-industrial sites such as collieries, where appropriate, as areas for habitat creation and nature conservation.

Why

To improve public access to nature and support unique biodiversity.

21b. Management of nutrient poor grassland areas within ex-industrial sites to increase diversity

Delivered by: Cut and collect mowing, scrub removal

How (Measures)

In alignment with local plans.

21a. Increase diversity of mosaic habitats on ex-industrial sites for wildlife.

Delivered by: By turf stripping, removing scrub, exposing substrate, scrape creation



Hare's foot inkcap mushroom © Mike Roberts



Painted lady © Mike Roberts

6.7 Farmland

Wider environmental benefits



Beauty and heritage



Food provision



Soil health



Clean water



Pollination



Carbon sequestration



Climate change mitigation

Whilst often thought of as an urban region, approximately 26% of the strategy area is composed of farmland. Much of the region's arable land is of extremely high quality, and therefore vital for food production. However, the intensification in agriculture in the last 100 years has contributed to steep declines in farmland species such as corn spurrey (plant) and skylark (bird). A balanced approach to land-use is needed to both maintain food production and safeguard important farmland species.

The mix of farmland types across the region support a variety of rare animal and plant species that are often only found in farmland habitats. These habitats also play an internationally important role in providing roosts and food for many migrating birds whose populations are in decline.

In the northern areas of the region, the land is primarily used for growing crops such as wheat, barley and vegetables. All year round these fields are home to declining species such as yellowhammer, grey partridge and lapwings. Towards the south of the region, the land is more suited to cattle grazing and grassland. These open fields provide year-round shelter and food for the rare wading birds living on the estuaries surrounding the Wirral such as curlew, shelduck and redshank.

Over late autumn and winter, farmland across the region provides shelter and food for hundreds of thousands of pink-footed geese that migrate here from Iceland and Greenland, along with many other birds that spend the winter months on our fields.



Pink footed geese © Mike Roberts



Meadow brown butterfly © Andrew Clark



Farmland, Hale © Mike Roberts

6.7 Farmland

Farmland is particularly important for:

- Pink footed geese
- Corn spurrey
- Corn bunting
- Brown hare

Much of the farmland in the region sits on clay, alluvium and peat soils, which due to their high organic matter, produce high-quality farming soils. However, these peat soils represent historic wetland areas that would have previously been lowland raised bogs: a habitat known for its carbon storage and water retention function, which is in sharp decline across the region. Whilst reverting all these soils back to their original habitats would have a significant impact on local farming communities and is an unrealistic aim, the LNRS encourages a movement towards wetter methods of farming and exploring paludiculture options in areas with peat soils.

The farmland priorities and measures set out in this section seek to work with farmers to create a balance between maintaining agricultural productivity and supporting rare farmland species. Agroforestry, the integration of trees into agriculture, provides a good opportunity to deliver this balance with benefits for farming, nature and climate: the planting of trees, shrubs and hedges on farmland can create healthier soil and produce higher yields for farmers as well as providing vital habitat for farmland wildlife.

Through the use of regenerative farming methods, reductions in fertiliser and pesticide inputs and highlighting the importance of soil quality, the priorities aim to help preserve our farmland habitats and soils for many generations. Farming in partnership with nature by creating buffer strips, hedgerows and ditches and managing areas for farmland birds will allow wildlife to recover and create a stronghold of farmland species in the region, while maintaining productivity of the land.



Farmland, Tarbock © Joanne Doolin



Lapwing © Mike Roberts



Cattle egret © Mike Roberts

6.7 Farmland

Priorities 22 - 25

22. Sustainable farming in partnership with nature to improve biodiversity while maintaining agricultural productivity.

Why

To improve soil quality, contribute to sustainable water management, support pollinators and other important farmland species.

How (Measures)

22a. Land management for farmland birds.

Delivered by: Providing undisturbed areas for ground nesting birds, use of overwinter stubble, creating and restoring ponds, planting winter bird seed mixes, leaving arable margins, changing crop timings, adopting conservation headlands, installing nest boxes.

22b. Creation, management and buffering of farmland habitats important to biodiversity.

Delivered by: Hedgerows, field margins, ditch, pond and river networks, woodland, veteran trees, in-field trees and other habitats.

22c. More orchards including agroforestry, local community orchards and more local farming with a focus on traditional management and creation

Not mapped

22d. Wider use of regenerative farming across all types of farmlands.

Not mapped

Delivered by: Reductions in inputs and pesticides, using low input crop management, reducing grazing pressure, creating and extending field margins and use of nature friendly farming methods to increase invertebrate numbers as appropriate for the farmland

22e. Reduction in nutrient and chemical inputs to improve soil condition and reduce runoff.

Delivered by: Using direct drill, minimum tillage, soil testing, cover crops, crop rotation and other methods

23. Reduced soil and nutrient run off from our farmlands.

Why

To improve water quality and habitat condition of rivers, estuaries and intertidal habitats for the species and people that use them.

How (Measures)

22d*. Wider use of regenerative farming across all types of farmlands.

Not mapped

23a. Improved soil condition of agricultural land.

Not mapped

Delivered by: Using direct drill, minimum tillage, soil testing, cover crops, crop rotation and other methods.

23b. Creation and widening of buffers around fields and sensitive habitats to reduce run off into habitats.

Delivered by: Planting of shelter belts and hedgerows with trees around fields watercourses and wetlands to reduce run-off into sensitive habitats and reduce soil erosion, Use of hedgerows such as banked and contour hedgerows to intercept runoff and erosion

* indicates that this measure is a repeat from a previous priority that also relates to this one.

6.7 Farmland

Priorities 22 - 25

24. More sustainable farming methods and water management on agricultural peat soils.

Why

To restore and improve peatland condition, promote farmland wildlife, climate-proof farming livelihoods and protect this valuable carbon store.

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How (Measures)

24a. Promotion of wetter farming methods through reduced drainage on agricultural peatlands and other wet soils.



Delivered by: Using crops more tolerant of higher water tables, investigating the use of paludiculture and other methods.

Unmapped Measure

4c*. Management of existing woodland on peat towards a more wet woodland structure.



Harvest mouse © Mike Roberts

25. Reconnected, new and better managed tree, ditch and hedgerow networks.

Why

To improve habitat connectivity and biodiversity benefits, reduce soil erosion and mitigate run-off.

How (Measures)

25a. Creation of new hedgerow and ditch networks to connect habitats across landscapes.

25b. Hedgerows managed to improve structure and opportunities for wildlife.



Delivered by: Laying, reduction in cutting frequency, planting of hedgerow trees, increased diversity of woody species, and increased buffer zones between hedges and agricultural land.

25c. Management of ditches for wildlife.



Delivered by: Rotational vegetation management and de-silting, widening corners, water level management, berm creation and other suitable measures

Not mapped

6.8 Invasive Species

Priority 26.

Invasive species are those that have been introduced into areas where they are not naturally found, either intentionally or accidentally. Many of these are not native to the UK, but even some native species can be invasive when introduced to the wrong habitat. Invasive species compete for resources, damage habitats, bring in diseases and cause extinctions of native species. They can disrupt whole ecosystems and the services which they provide and cost the UK economy approximately £1.8 billion per year¹.

Both plant and animal species can be invasive. Himalayan balsam, a quick growing plant, has rapidly invaded the waterways and wetlands across the region. Its exploding seed pods can cast seeds into nearby watercourses which then transport the seeds to new locations. Grey squirrels threaten one of our rarest native mammals, the red squirrel, by transporting diseases and out competing for resources. They also cause an estimated £37m of damage to UK woodlands each year².

Within the Liverpool City Region, numerous invasive species threaten our native species and habitats across the region. Invasive species were present at 79% of Local Wildlife Sites surveyed in 2023-24. Our measures highlight specific species that cause problems for sensitive habitats and species but recognise the need for general control of invasive species across the region. Targeted and landscape-scale management is essential.

26. Landscape wide strategies combatting current invasive species and responding rapidly to new threats.

Why

To improve protect habitats and species from invasive species encroachment.

Measures

26a. Appropriate invasive species management prioritised in sensitive habitats and important corridors along with other Schedule 9 and invasive species such as Japanese knotweed, parakeet, wireweed, Chinese mitten crab, signal crayfish etc control where needed.

26b. Grey squirrel management across the LCR.

26c. Mink management in areas with water vole populations.

26d. Canada geese management in sensitive or overgrazed habitats.



26e. Rhododendron ponticum removal in woodland.

26f. Himalayan Balsam removal in key waterways, along transport networks and in other sensitive habitats (working strategically with neighbouring LAs to reduce/prevent INNS seeds being washed downstream from untreated areas upstream).

26g. Japanese rose and sea buckthorn removal along the coast.

26h. Floating pennywort removal along canals.

Along the Sefton Coast a plant called sea buckthorn was planted in the 1900s to reduce the movement of sand. It has since spread over huge areas and threatens many of the habitats and species found there.

6.9 Species

Priorities 27 - 36

The species highlighted as priorities within the LNRS are those that require bespoke action and cannot rely on the habitat priorities alone to support their survival. They were shortlisted by a Species Technical Group consisting of local experts, following Natural England guidance which considered factors such as conservation status, national and local significance, urgency of action needed and deliverability of this.

- Our main red squirrel population is restricted to the pine woods along the Sefton Coast, with some small populations also remaining in Fazakerley and Knowsley. This species needs specific woodland planting and management to both discourage grey squirrel and maintain food availability.
- The region's coasts are a stronghold of the rare natterjack toad which breeds in shallow open pools called scrapes or slacks. Without regular grazing or appropriate management these pools become covered in vegetation. Whilst this can benefit other species, a proportion of overgrown slacks should be cleared to maintain habitat for natterjack toads.
- The region is home to many different reptiles and amphibians that are in decline or regionally rare. Pond, wetland and rough grassland creation and appropriate management can help expand and increase their populations.
- The willow tit is a declining bird that lives in wet woodland and scrub, with populations around St Helens and the upper Mersey Estuary around Wigg Island. This species will benefit from the creation of low wet scrub and woodland, focused around areas of existing habitat.
- Harbour porpoise are regular visitors along the Mersey Estuary as far up as Speke. This species uses the deep shipping canal through the middle of the estuary as a "hunting highway". This highway needs to be maintained, and awareness raised of the species presence in the Mersey.
- Black poplar is a species of native tree that is declining in the UK. Local populations, an important genetic bank for the species, are found mainly on the Wirral, with one population planted in Sefton around 150 years ago. Many of the Wirral trees have been genetically tested to confirm their native status: planting projects will increase the genetic diversity of the species.
- A population of grey seals currently live on a sand bank near Hilbre Island outside of their breeding season. This population is at risk of disturbance by boats and other recreational activities which could be better managed.
- Ten species of bat are regularly found in the region, across all habitats. Bats are extremely sensitive to light and avoid areas that are any brighter than a full moon. Lighting in urban and industrial environments can prevent bats from foraging and roosting. Sensitive lighting design can reduce this impact, helping bats to travel from roosts to feeding areas.
- The forester moth is restricted to the Sefton coast and found in only a few grassland areas. This species requires open grassland and safeguarding from public disturbance.
- Ground nesting birds across the region are in decline and at risk of disturbance from many different sources. These species need undisturbed areas of ground to breed on and public awareness campaigns are needed to help reduce the impact of recreational activity.

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27. Expand the range and increase the population of red squirrels

How (Measures)

27a. Woodland creation and management designed to favour red squirrels.

Delivered by: Increased planting of woodland using appropriate tree species and active management of existing and planned woodland to favour red squirrels including invasive species management.



28. Increased populations of natterjack toad

How (Measures)

28a. Scrape creation and management around existing natterjacks populations.

Delivered by: Scrub removal, selective use of fencing to reduce recreational disturbance, public awareness campaigns, buffering of habitats, seasonal zoning.

28b. Additional natterjack habitat creation to increase connectivity between existing populations, and to allow colonisation of new areas.

Delivered by: Scrape creation near existing populations, extending and connecting suitable terrestrial habitats of short grassland and open sand

29. Increase the distribution and population of reptiles and amphibians

How (Measures)

29a. Management of habitats for reptiles and amphibians.

Delivered by: Management of rough grassland, field margins and wetlands, leaving areas of rough grass mown only every two or three years.

29b. Creating habitats corridors to allow reptiles to move and disperse through the region.

Delivered by: Grassland and scrub corridors along hedgerows, margins and other habitats.

2b*. Creation of new pond networks and associated habitats.

Delivered by: Restoration of ghost ponds and floodplain connections, creating ponds to reinforce existing networks, and creation of new pond networks with different sizes and structures

2c*. Management of existing ponds as a mosaic of habitats from new ponds to late succession ponds that are transitioning to other habitats.

30. Increased populations of Willow Tit

How (Measures)

30a. Reduction in competition from other bird species such as blue tit. ↪

Delivered by: Not installing bird boxes in and around willow tit populations, increased public awareness

30b. Maintenance of low canopy, early succession wet and damp woodlands with dense scrub layers and available dead wood for nesting. ↪

Delivered by: Removal/laying/coppicing of mature trees in wet woodland and raising water table using natural flood management.

15a*. Creation of new woodlands and scrub through planting and natural regeneration. ↪

Delivered by: Planting climate resilient, ideally native tree species, planting of scrub blocks around new woodlands,, grey squirrel management to improve woodland establishment, targeting historically wooded areas for new woodland creation aligned with the Mersey Forest Plan.

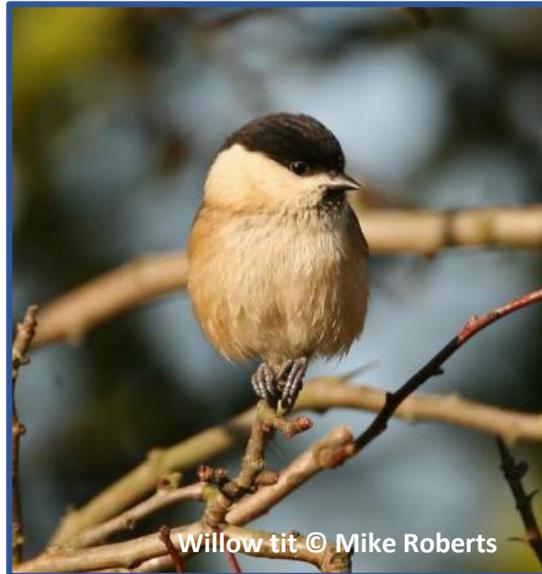
31. Support the population of harbour porpoise using the estuaries

How (Measures)

31a. Maintenance of a tidally dynamic "hunting highway" for this species currently using the deep shipping lanes in the Mersey Estuary. ↪

Delivered by: Raised awareness of species using the estuaries, public campaign to inform river users of this species and its habits.)

Not mapped



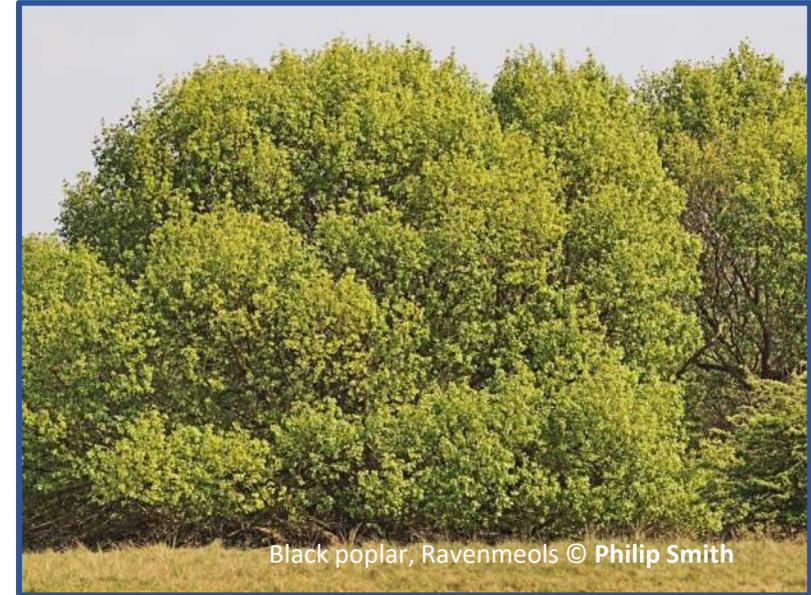
Willow tit © Mike Roberts

32. Increased number of black poplar trees

How (Measures)

32a. Increased planting of female trees using genetically confirmed black poplar trees.

32b. Planting males and females in proximity of each other to allow nurseries of native saplings to form.



Black poplar, Ravenmeols © Philip Smith

* indicates that this measure is a repeat from a previous priority that also relates to this one.

6.8 Species

Priority 27 – 36

33. Grey seals: Protection of grey seal from recreational disturbance

How (Measures)

33a. Safeguarding of locations regularly used by seal populations. ↩

Delivered by: Public education of recreational impact on seals including information boards on and around the island and its access



34. Bats: A network of dark corridors to allow bats to move across the landscape

How (Measures)

34a. Reducing light spill into sensitive habitats and corridors for bats. ↩

Delivered by: Retro fitting of mitigation onto pre-existing lights to reduce light spill, create warmer light, and direct light away from sensitive areas, Planting of screening along important corridors

18a*. Installation of biodiversity enhancements in new developments.



35. Forester moth: Improved habitat and increased range of forester moth.

How (Measures)

35a. Management of grassland and heathland to increase the population. ↩

Delivered by: Areas fenced off from recreational disturbance, scrub and rush removal coupled with mowing to maintain open grassland habitats.

13b. Improved heathland management.

Delivered by: Restoring low-level grazing, scrub and leaf litter removal, targeted tree management, climate resilience management such as the use of fire breaks, removal and mitigation of nutrient pollution, drainage management as appropriate, buffer zone creation.



DRAFT

* indicates that this measure is a repeat from a previous priority that also relates to this one.

6.8 Species

Priority 27 – 36

36. Ground nesting birds: Increased population and wider availability of nesting opportunities.

How (Measures)

36a. Provision of undisturbed areas for ground nesting birds. ↪

Page 90 **Delivered by:** Fencing of sensitive areas to reduce recreational disturbance with areas of short grass maintained for some species, increased public awareness campaigns such as "Give birds a Break" to cover both farmland and estuarine birds, provision of breeding rafts and shingle islands for common tern

22a*. Land management for farmland birds. ↪

Delivered by: Providing undisturbed areas for ground nesting birds, use of overwinter stubble, creating and restoring farmland ponds, planting winter birds seed mixes, leaving arable margins, changing crop timings, adopting conservation headlands, installing nest boxes.



7. The local habitat map

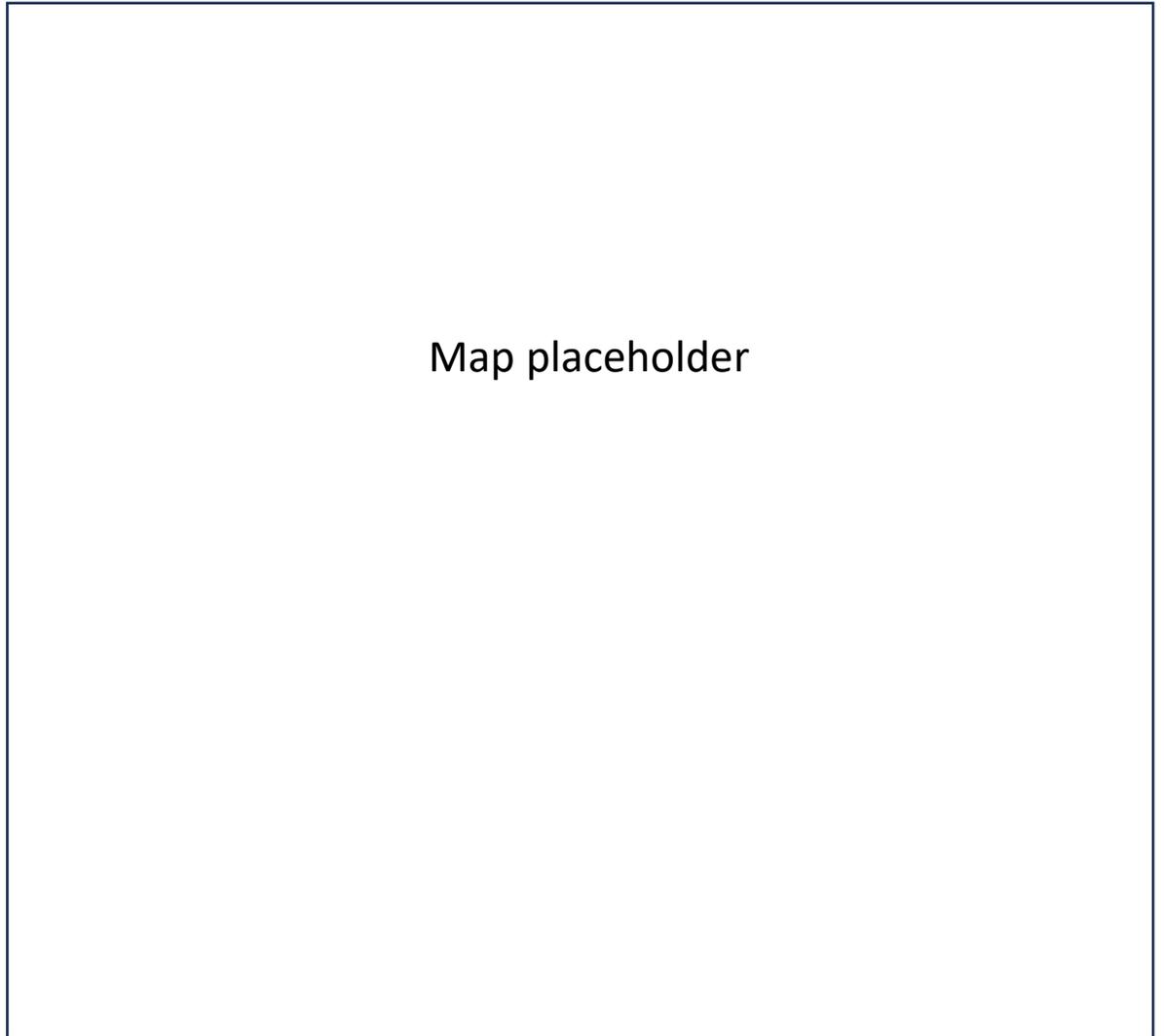
To help us achieve the priorities set out in this strategy, we need to target action in the places that would provide the biggest benefit for nature, the wider environment and for people. To enable this, a local habitat map for the Liverpool City Region has been developed.

The map acts as a blueprint for nature recovery, coordinating our approach across the region, based on the guiding principles set out in section 6.0. It can be used by anyone interested in decision-making for nature, whether that be large or small scale. However, the locations identified are not the only places where you can take action for nature. It is also important to create and expand habitats in areas that are not yet identified on the map: every action counts.

The map shows existing core nature sites and identifies opportunity areas where there is a potential to enhance, restore and create habitats in a joined-up, spatial approach to nature recovery. Each location identified in the map is assigned measures from section 6 that would help to achieve one of the priorities, based on their suitability and deliverability. Further information on the mapping methodology can be found in appendix X.

However, the mapping of measures does not confer permission to carry out proposals. While the opportunities identified in the map are based on best available data and local knowledge, all necessary consents and permissions, in line with relevant policy, guidance and decision-making frameworks must be obtained. Simultaneously, identification of an opportunity for nature does not prevent any other form of land use.

The marine environment is beyond the scope of the LNRS and is not mapped.



Find out how you can help nature recover in section 8.



7.1 Core local nature sites

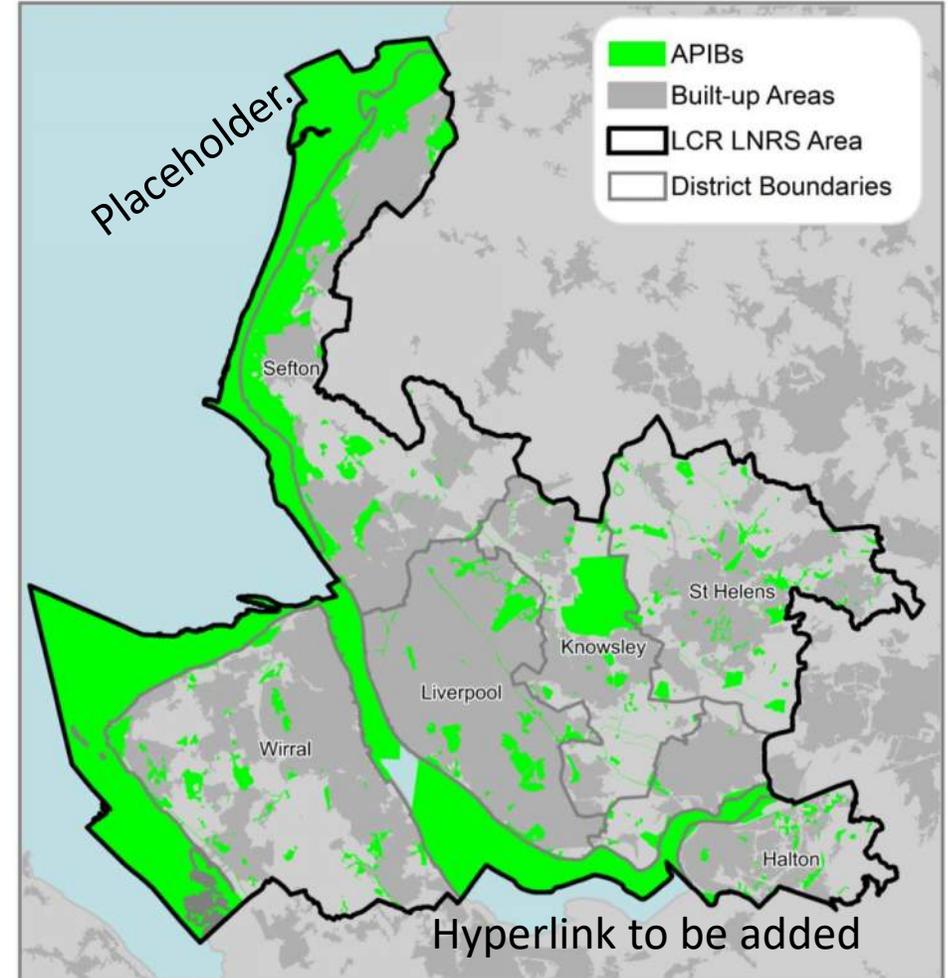
The local habitat map is made up of two components: core local nature sites and opportunity areas.

Core local nature sites make up 40% of the strategy area, owed largely to the importance of our coasts and estuaries. They are existing, protected wildlife sites, also known as “areas of particular importance for biodiversity (APIB)”. These include internationally, nationally and locally designated sites and [irreplaceable habitats](#) (those which are very difficult to restore once lost). Designated sites include:

- Special Protection Areas (SPAs)
- Sites of Special Scientific Interest (SSSIs)
- Special Areas of Conservation (SACs)
- Ramsar wetland sites
- National Nature Reserves (NNRs)
- Local Nature Reserves (LNRs)
- Local Wildlife Sites (LWSs)

LNRs guidance mandates that measures mapped to designated sites must be additional to any existing management plans. As much of our designated site network already has comprehensive management plans in place, these areas, including much of the Sefton coast, could not be mapped but their importance for biodiversity should not be overlooked.

There are also many core local nature sites across the region that are unmanaged or managed for purposes that do not benefit biodiversity, and many that are not in good ecological condition. Core local nature sites are unevenly distributed across the region and poorly connected.



The aim: wherever possible, core local nature sites should be enhanced and expanded, managed for biodiversity and connected by the opportunities identified in the LNRs.

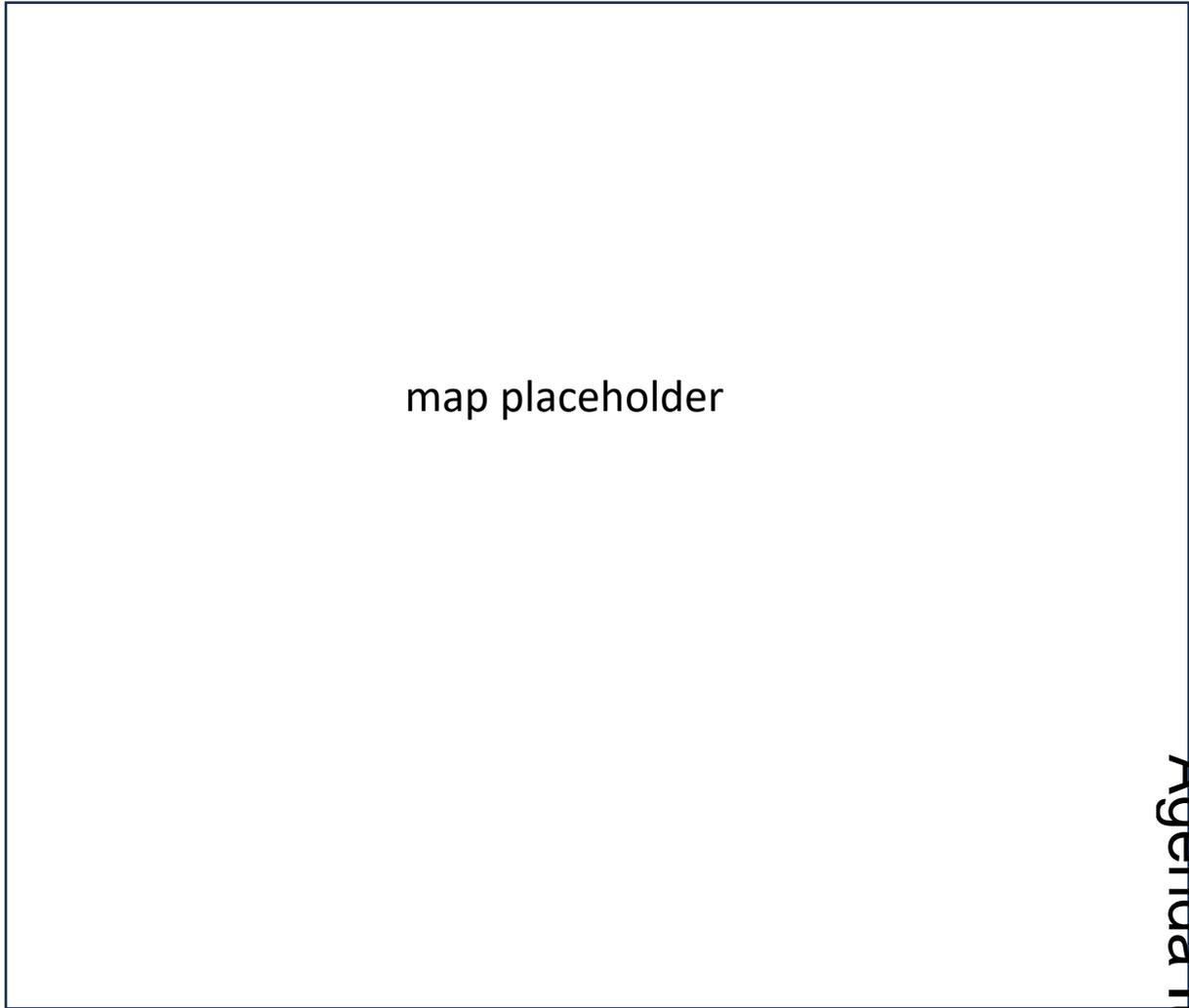
7.2 Opportunity areas

Opportunity areas, also known as “areas that could become of particular importance for biodiversity” (ACBs), are places where an opportunity to enhance, restore or create habitat has been identified.

The opportunity mapping methodology (appendix X) is founded on CIEEM’s Good Practice Guidance for Ecological Restoration and the Lawton Principles of 'Bigger, Better, More and Joined-Up'. While opportunities were selected primarily for their biodiversity benefit, ecosystem service mapping identified where additional wider environmental benefits could be gained (e.g. flood reduction, air quality improvements). Opportunity areas and their associated measures (actions) have been mapped based on where action would have the greatest impact for nature recovery and for people. Several factors were considered:

- the needs of nature
- the needs of people
- ability to provide wider environmental benefits
- impacts of future climate change
- competing land uses

Opportunity areas are mapped on land that is currently used for a variety of different purposes. The opportunity areas identified in the LNRS have potential to provide a benefit for biodiversity and the wider environment, however, they are not protected sites and do not prevent other forms of land use.



The aim: to join-up and expand upon existing core local nature sites, creating better-connected, resilient and high-quality habitat networks and green spaces for people across the region.

8. Delivery: using the map

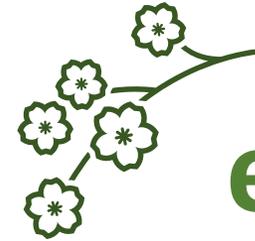
The local habitat map highlights where there are opportunities to enhance and connect existing habitats and support species movement, and when creating new spaces for nature, it outlines what the best action to take would be in each location. It can be used to guide action for community groups and for landscape scale interventions alike.

Each location identified as an opportunity on the map is assigned a primary and, in most cases, secondary measure (action), giving flexibility to anyone wishing to create or enhance habitat in this area.

While the LNRS is not a delivery plan, the local habitat map identifies strategic areas where action for nature recovery would have the greatest impact. However, these are not the only actions that can be taken. Any action in support of nature recovery outside of these areas is also very much encouraged and unmapped measures from section 6, though unable to be targeted to specific locations in the map, are equally as important to deliver.

Everyone has a role to play in helping nature to recover across the Liverpool City Region and no action is too small. Lots of small actions together have a big impact in supporting nature.

This section sets out how different groups can best contribute to delivery of the goals and opportunities identified within the strategy.



**every
action
counts**



8.1 Landowners and land managers

Landowners and land managers have the potential to make a big contribution to nature recovery across the region. Managing land with consideration of the local ecology and ecosystem services not only better supports nature, but people too.

Where land is used primarily for purposes other than space for nature, this does not necessarily have to change, as there may be potential to incorporate opportunities for nature in conjunction with other activities.

The local habitat map shows landowners and land managers where opportunities to do something significant for nature recovery are located and what the best action to take would be. The opportunities identified are those that that will best deliver a functional and resilient nature network across the region, but do not rule out action in other areas. Unmapped measures that are not targeted to specific locations should also be considered.

The opportunities identified give landowners an opportunity to receive biodiversity net gain funding for delivery of habitat enhancement or creation on their land and may support funding applications for agri-environment schemes

It also highlights where there are nearby opportunities and where potential landowner clusters could be formed to collaborate on nature recovery initiatives.

8.2 Developers and planners

Under the Environment Act 2021, local planning authorities must take account of the LNRS in their policies and local plans. Developers would therefore likely benefit from aligning with the LNRS.

Though a balanced approach to growth and development is needed to fulfil the competing needs within the region, developers and planners have the potential to put nature at the heart of urban design and planning. Incorporating nature into development plans and wider infrastructure provides an opportunity to create greener, healthier and more resilient spaces for people to live and work.

The local habitat map shows developers and planners where opportunities to do something significant for nature recovery are located and what the best action to take would be. The opportunities identified are those that will best deliver a functional and resilient nature network across the region, but do not rule out action in other areas. Unmapped measures that are not targeted to specific locations should also be considered.

The map also identifies opportunities for developers to deliver mandatory biodiversity net gain. Developers are incentivised through a 15% uplift in the BNG metric tool to create and enhance habitats in areas of 'strategic significance': including those identified with mapped measures within the LNRS.

It shows at a regional scale how habitats can be enhanced and better connected, where creation of habitat could contribute to the government's goal of ensuring that everyone in England lives within 15 minutes' walk of a green or blue space and shows where there is potential to implement nature-based solutions to address some of the challenges we face such as air quality and flood risk.

8.3 Environmental Organisations

While environmental organisations have been leading the way on nature recovery for a long time, the LNRS provides a regional-scale opportunity to align approaches and work towards an agreed set of shared goals. Many environmental organisations contributed to the creation of the map, and they will be pivotal in shaping future iterations.

The LNRS should raise awareness of the importance of the natural environment and encourage landowners, businesses, developers and community groups to collaborate with environmental organisations on nature recovery initiatives.

The local habitat map shows environmental organisations where opportunities to do something significant for nature recovery are located and what the best action to take would be. The opportunities identified are those that that will best deliver a functional and resilient nature network across the region, but do not rule out action in other areas. Unmapped measures that are not targeted to specific locations should also be considered.

The map will help to identify where efforts and funding should be targeted, where collaboration could take place and where there is potential to join-up and better-connect sites for nature. It can also act as an educational tool when engaging with the local community and potential delivery partners.

8.4 Businesses and other organisations

The LNRS encourages all sectors to support nature recovery. We need all businesses and organisations to embed nature-friendly practices into their operations and corporate plans, reduce their impact on the natural environment and invest in nature's recovery. Simultaneously, a thriving natural environment provides essential resources that businesses depend on, and resilience to the socio-economic effects of climate change.

The local habitat map shows businesses and other organisations where opportunities to do something significant for nature recovery are located and what the best action to take would be. The opportunities identified are those that that will best deliver a functional and resilient nature network across the region, but do not rule out action in other areas. Unmapped measures that are not targeted to specific locations should also be considered.

The map will help businesses to understand how their activities fit within the local environment and highlight what the priorities for nature are in the local area. It allows nearby opportunities to be identified which could provide potential for collaboration and staff volunteering schemes or opportunities to support a local nature recovery initiative. It also highlights where investment in green and blue infrastructure would be best placed. Many businesses rely on the natural environment directly or indirectly and need to identify where restoring nature can help safeguard their future.

8.5 Community groups

Community groups across the region form some of our most dedicated supporters of the natural environment, bringing people together to care for nature and taking ownership of their local green and blue spaces. Community groups not only benefit biodiversity and add value to local spaces, but they also provide a strengthened sense of community, development of green skills and connection of people to the natural environment, which brings both mental and physical health benefits.

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Community groups contain a wealth of local knowledge, experience and understanding of the needs of the local community and their perspectives should be considered when new initiatives are being formed.

The Liverpool City Region is fortunate to have many highly expert naturalist groups, and many active community groups tending local sites. When new initiatives are being considered these groups should be closely involved; they can supply considerable expertise and inspiration.

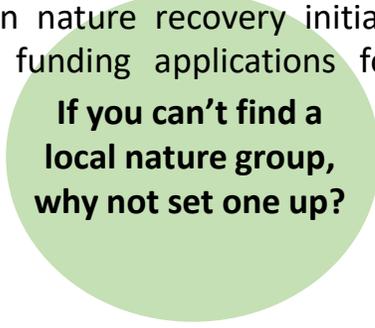


The LNRS should raise awareness of the importance of nature and the impact that every individual can have, encouraging more people to join their local nature group.

The local habitat map shows community groups where opportunities to do something significant for nature recovery are located and what the best action to take would be. The opportunities identified are those that will best deliver a functional and resilient nature network across the region, but do not rule out action in other areas. No action is too small! Unmapped measures that are not targeted to specific locations should also be considered. Community groups are particularly well placed to deliver many of the urban unmapped measures and contribute towards the enabling factors in section 8.7.

The map will help community groups to identify how their local area links into the wider nature recovery approach and how their efforts could best support their local environment.

It shows where there are nearby opportunities that could lead to potential collaboration on nature recovery initiatives and could be used to support funding applications for nature projects.



8.6 Residents

You don't need to be a landowner or part of an organisation to take action for nature. Beyond the opportunity areas identified in the local habitat map, there are plenty of other ways to help nature. As a largely urbanised region, personal spaces like gardens, yards and balconies and communal spaces such as alleyways and other outdoor communal areas are particularly important for habitat connectivity, helping species to move through the region.

The local habitat map can help residents to understand how their local green space can best support the surrounding natural environment and what actions would have the greatest impact for nature recovery in the area. Unmapped measures and unmapped locations, such as private gardens, are just as important as those identified in the map. Residents are well placed to deliver many of the urban unmapped measures and can contribute towards the enabling factors in section 8.7.

No action is too small!

If you have a garden or other green space, here are some things you can do to support nature:

- Allow nature to expand e.g. let your lawn grow
- Plant pollinator-friendly plants
- Keep it chemical free
- Create a hedgehog hole to help hedgehogs pass through your garden
- Build a log pile to provide homes for insects
- Create a pond of any size
- Grow a hedge to provide berries and nesting sites for birds
- Garden vertically e.g. green walls and hanging pots

There's a role for everyone!

If you don't have access to an outdoor space, there are many other ways you can get involved:

- **Join a local nature group**

A great way to meet like-minded people while helping nature.

- **Litter-pick in your local area**

Go it alone or join a community clean-up event

- **Plant in a window box**

Every pot counts!

- **Record the wildlife near you:**

Local environmental record centres Merseyside BioBank and Cheshire RECORD need volunteers to help monitor species populations.

- **Spread the word**

Tell others why it's important to look after the natural environment and the benefit it brings.

See appendix **X** for more guidance on habitat creation and enhancement.

8.7 Enabling Factors for Delivery

In addition to the mapped and unmapped measures identified, there are several other interdependent factors that are needed to enable widespread delivery of nature recovery across the region.



Recording & Monitoring

A robust system of sharing data with local environmental record centres and getting more people involved in recording species and habitat data will improve our local records and allow us to monitor progress.



Behaviour Change

Encouraging positive interactions with nature and reducing our impact. Small scale decisions that collectively have a big impact: reducing litter, keeping gardens natural, reducing recreational disturbance.



Collaboration

Strengthening partnerships across all sectors to capitalise on existing knowledge, experience and resources. Expanding delivery potential by working towards the same goals.



Management Plans

Long-term, sustainable, biodiversity-focussed and resourced management plans in line with regulations to preserve habitats and their wider benefits.



Leadership

National and local leaders prioritising and facilitating nature recovery, influencing future investment decisions, embedding nature into cross-discipline policy and plans, coordinating efforts and driving progress forward.



Community Care & Custodianship

Encouraging residents and community groups to support and maintain their local nature sites and instilling a sense of pride in the natural environment.



Funding

Attracting innovative funding mechanisms for the long-term conservation of the natural environment. Increasing investment from the public and private sector.



Skills & Capacity

Increasing practical and strategic green skills extent, availability and capacity across private, public and voluntary sectors and better integrating nature recovery into other disciplines.



Education

Helping people to understand why the natural environment is important to encourage support and action, through information sharing, events, campaigns, programs in schools and online resources.

9.0 What's next?

Time to deliver!

The delivery of nature recovery interventions informed by the LNRS will be a collaborative exercise involving a wide range of stakeholders. This collective approach is essential as the scale of nature recovery needed and the speed at which it must take place cannot be achieved solely by the existing organisations and partnerships working in this space. Working together in this way towards a common goal, aligned to the LNRS, will ensure that efforts are coordinated and that the strengths and resources of multiple organisations are leveraged.

The strategy aims to lay a foundation to empower us all to take action, whether this be through use of the local habitat map to join-up areas of need with areas of opportunity, by informing and influencing future investment decisions, acting as a data-informed evidence base to drive local and national policy change, or by reinforcing the need for future devolved funds and powers. The LNRS must not be seen only as a distinct policy and delivery area. Nature recovery must be a key integrated consideration in decision-making and programme design across disciplines to not only make nature recovery more feasible, but to add value to investment decisions and programmes and bring about the co-benefits to further the agenda of multiple policy areas.

By calling for collective action, we recognise that nature recovery is a shared responsibility that requires coordinated efforts from a wide variety of stakeholders, which this strategy is in-place to support.



Glossary

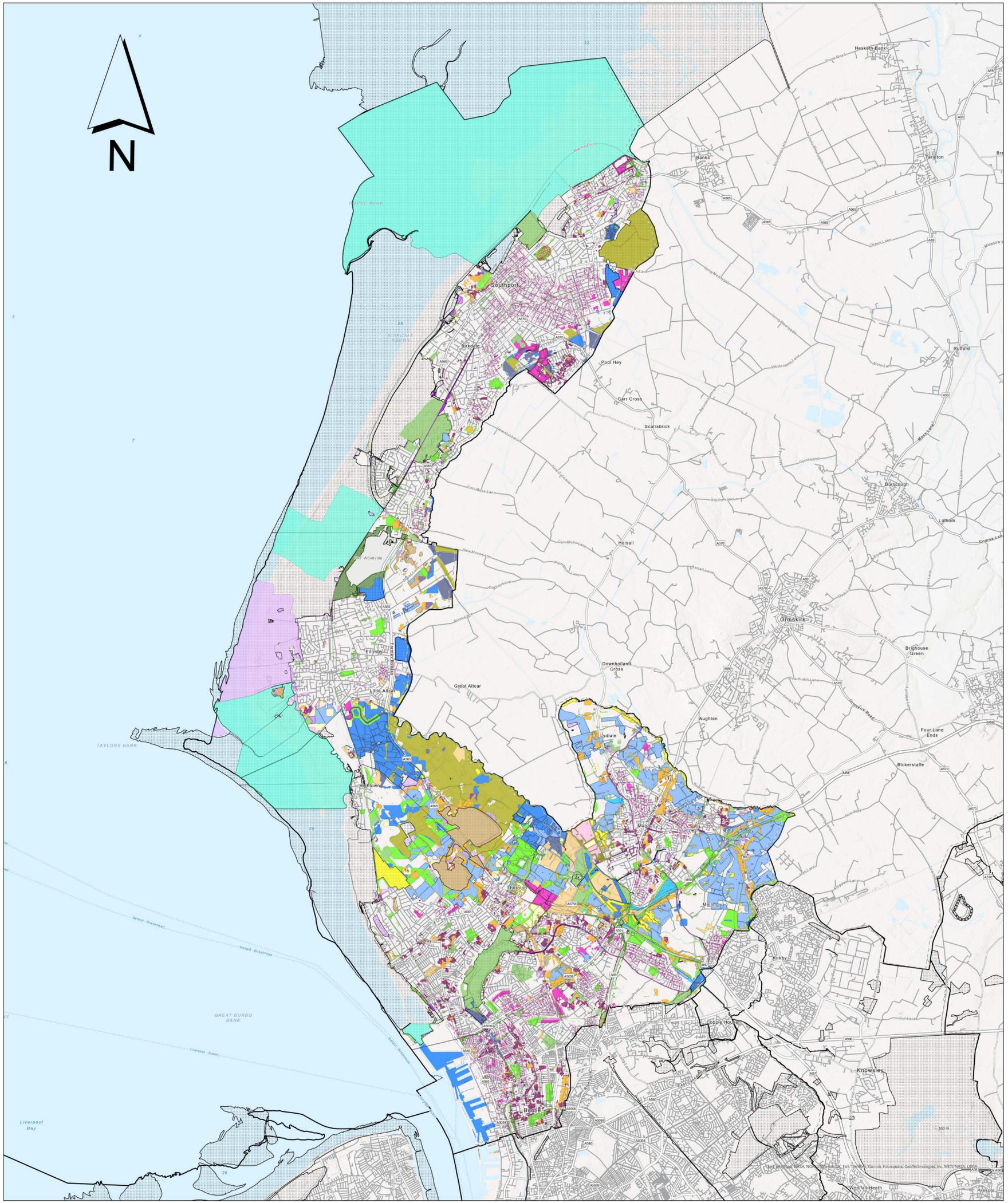
Yet to be completed

- ACBs
- APIBs
- BNG
- Ecosystem Services
- LERC
- Ecological Network
- Lawton Principles
- Measures
- Natural Capital
- Nature-based solutions
- NPPF
- Restore (see Environment Act definitions and Natural England doc TIN219 – Environment Act habitat target definitions)
- Enhance
- paludiculture
- Soilscape
- Strategic Significance

Appendices

Yet to be completed.

- Technical annex (methodology)
- List of priorities and measures with species supported and relevant guidance on habitat enhancement and creation



0 2 4 8 Kilometers

- | | | |
|---|--|--|
| <ul style="list-style-type: none"> Core local nature sites (APIBs) LA Boundaries Primary Measure ID 1a - Create wetland 1b - Create ponds and reedbeds to filter nutrients 1c - Restore floodplains and wetlands 2b - Create pond networks and associated habitats 3a - Remove river barriers 4b - Restore peatland habitats 5a - Create notches in coastal dunes 5b - Safeguard bird breeding/roosting sites 5c - Maintain coastal/estuarine mosaics 5d - Co-ordinated grazing management 6b - Coastal/estuarine disturbance mitigation 8b - Saltmarsh/intertidal habitat management 10a - Species-rich grassland management | <ul style="list-style-type: none"> 11a - Create grassland 11b - Transport verge management 13b - Heathland management 14a - Planted woodland management 15a - Create woodland and scrub 15b - Create woodland mosaics 16b - Maintain natural woodland structure 16c - Conserve wood pasture and parkland 17a - Manage blue infrastructure 17b - Create blue infrastructure 17c - Urban street trees 17d - Create wildlife-rich urban spaces 18a - Biodiversity enhancements in new developments 19a - Create OHM on brownfield 20a - Greening active travel routes 21a - Increase diversity of ex-industrial sites | <ul style="list-style-type: none"> 22a - Land management for farmland birds 22b - Create and buffer farmland habitats 22e - Reduce nutrient and chemical inputs 23b - Buffer sensitive habitats on farmland 24a - Wetter agriculture on peat and associated soils 25a - Create hedgerows and ditches 25b - Manage hedgerows for wildlife 27a - Red squirrel woodland creation 28b - Create natterjack habitat 29a - Manage herptile habitat 29b - Create herptile corridors 32a - Plant female black poplar 34a - Reduce light spill for bats 36a - Undisturbed areas for ground-nesting birds |
|---|--|--|

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Cabinet Report			
Report Title:		Gas Supply Contract Renewal 2026 -2030	
Date of meeting:	Thursday 9 January 2025		
Report to:	Cabinet		
Report of:	Executive Director – Regeneration, Economy and Assets		
Portfolio:	Cabinet Member - Regeneration Economy and Skills		
Wards affected:	All		
Is this a key decision:	Yes	Included in Forward Plan:	Yes
Exempt/confidential report:	No		

Summary:

Report to seek the approval for the award of the gas supply contract through the NEPO Gas Framework for a three year plus one year contract, in order to secure value for money and excellent customer service.

Recommendation(s):

- (1) That Sefton remain on the North-East Purchasing Organisation (NEPO) framework contract for the supply of gas to cover the period 1st April 2026 – 31st March 2029 (with a possible 1 year extension to 31 March 2030)
- (2) That the Executive Director of Regeneration, Economy & Assets be granted delegated authority to award any extension in consultation with the Cabinet Member for Regeneration, Economy and Skills; and
- (3) That authority be delegated to Executive Director of Regeneration, Economy & Assets to approve purchasing decisions and approve any contractual requirements within the contract term including the signing of all contract documents

1. The Rationale and Evidence for the Recommendations

- 1.1 Sefton have recently reviewed our options across 3 of the largest public sector buying organisation procurement frameworks, including Crown Commercial Services (CCS), North-East Purchasing Organisation (NEPO) and Eastern Shires Purchasing Organisation (ESPO).
- 1.2 The assessment, overseen by Sefton’s procurement team, was carried out via a detailed formal questionnaire and interviews, to ensure each framework supply

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contract was fully compliant with procurement legislation and included a detailed evaluation of the risks and benefits of each framework to assess best value.

- 1.3 NEPO were able to demonstrate value for money, excellent customer service and consistency of gas supplier. Remaining on the NEPO framework will also minimise disruption to services and minimise impact on staff resourcing.
- 1.4 Given the recent volatility in gas prices, a consortium approach to purchasing will bring the most benefit to Sefton.

2 Background

- 2.1 Sefton's existing contract with the North East Procurement Organisation (NEPO) for gas supplies will come to an end on 31 March 2026. The annual Gas Supply contract value, including schools and New Directions sites, is approaching £3.0 million per annum, but has been as high as £4.0 million following the volatility of the global gas markets.
- 2.2 Officers have recently completed an appraisal of our current gas framework options to secure best value. Utilising a framework provides access to a consortium approach to purchasing. This approach is recommended by the UK government for all public sector organisations procuring energy. The Pan Government Energy Project, recommends that all public sector organisations adopt aggregated, flexible and risk-managed energy procurement, which can be achieved through a Central Purchasing Body (CPB) framework. The benefits to Sefton from this approach include :-
 - Achieving a more competitive price through economies of scale by buying in bulk,
 - Increased influence on the supplier to perform, with the additional contract management provided via the framework,
 - Increased scale allows suppliers to have larger support teams with specialist knowledge and
 - Improved market insight, aligning procurement to future potential aggregation.
- 2.3 Three UK Procurement Legislation compliant frameworks, NEPO, CCS and ESPO, were considered as possible options. After conferring with Sefton's procurement team, officers contacted each framework provider and an in-depth interview was carried out using the same set of questions. The evaluation matrix with weightings is provided in Appendix 1.
- 2.4 The frameworks were assessed on the themes of:
 - A well-managed approach to purchasing/ risk in the market
 - Previous performance
 - Impact on operations
 - Net Zero Objectives and Social Value

2 Evaluation Outcome

- 3.1 All framework providers performed well and offered a competitive and flexible service. However, the group assessment scored the NEPO offer ahead of the other two, due to strengths in excellent customer service, competitive pricing and

flexibility and responsiveness of purchasing strategy. The basis for this decision was then confirmed through consultation with senior officers.

- 3.2 Council officers have been guided by the need to remain compliant with procurement rules and achieve best value for the Council and its partners. Risks associated with price volatility will be reduced by being part of a consortium approach to purchasing and bring the most benefit to Sefton. Given the ongoing volatility of the energy markets and uncertainty of global gas supplies, being part of a consortium represents a lower risk profile to current/ future budgets.

4 The North-East Purchasing Organisation (NEPO) gas framework

- 4.1 Remaining within the NEPO Framework for Supply of Gas will ensure that the procurement of the Councils gas supply will be fully compliant with UK Procurement Legislation and the Council's Contract Procedure Rules and will provide a comprehensive audit trail.
- 4.2 NEPO have an experienced trading team with robust strategies and governance in place. They have achieved better than market average, competitive pricing through the strategies employed. They have recently reduced the amount of gas they hedge, to reflect changing market conditions. The market is becoming more stable and prices have fallen since the extreme high's experienced in 2022. By hedging a smaller amount of gas ahead of the delivery year (60%), they are offering a more competitive price currently that those who hedge up to 100%. They have flexibility within their strategy to purchase more, if market conditions change. However, this hedging strategy does mean that price certainty cannot be provided ahead of the delivery year and some variation on price will occur month by month. It also means that any significant changes in market prices will be reflected in price achieved more quickly than a longer trading strategy.
- 4.3 The trading team continually monitor market conditions and purchase gas supplies in advance when prices are low. Set amounts are required to be purchased throughout the proceeding 12-18 months prior to supply. The purchases are combined in a 'basket' and an average price is delivered to all consortium members.
- 4.4 The current purchasing strategy involved purchasing a minimum of 60% ahead with the remaining purchase made within period. This means that the price is not pre-set each year (as currently happens with the electricity contract) but fluctuates month by month by a small amount. This flexibility helps to 1. avoid over purchasing gas and having to sell back to the market 2. avoids the risk element factored into the cost of gas when buying months or years in advance. This approach has led to prices being very competitive over the past contract term.
- 4.5 The NEPO Framework Gas Supplier is Corona Energy Limited, with whom the supply contract management is undertaken directly.
- 4.6 Council Officers will work with NEPO and gas supplier to maximise opportunities to embed social value and Net-Zero opportunities within the arrangement, for example requesting the successful supplier provides appropriate material and presentations to Council Officers on the positive impact of environmental sourcing.

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- 4.7 The options of securing low carbon biogas together with appropriate certification has also been explored as a possibility within this contract at a future date.
- 4.8 The framework allows for the collection of a rebate, which has been included in all previous Sefton Council gas procurements. The rebate is for £0.001 to be added to each kWh of gas consumed and billed across all buildings. The rebate amount is then reclaimed by the Council to support the management of the utilities for the entire portfolio, providing metering services, billing validation services, advice & education and Display Energy Certificates (DECs) for all sites. A rebate of £0.001 will be included as part of this contract term.

5 Actions required

- 5.1 To join the consortium basket with the lead times of approximately 12 months. Therefore, the following is proposed;
Following Cabinet approval, inform NEPO of our intention to maintain our consortium buying strategy from 1 April 2026 until 31 March 2029 (with the option of a 1 year extension to 31 March 2030), by signing the revised contract documents.
- 5.2 On the renewal date (1 April 2026), there will be no disruption to existing routines and account management.
- 5.3 Financial management and billing advice will continue to be issued directly to all budget holders and sites once a predicted annual gas price is received, followed by monthly updates.

6. Financial Implications

(A) Revenue Costs : The cost of all utilities is met from individual departmental revenue budgets.

(B) Capital Costs : N/A

7. Legal Implications

As per all utility contracts Sefton will be required to contract with the gas supply company as a member of the Framework.

8. Corporate Risk Implications

As with any globally traded commodity, there is a risk of price volatility. Being part of a consortium and hedging a large percentage of use, helps to reduce risk and shelter the Council from extreme market prices.

By outsourcing the trading element of the purchase of gas to a dedicated trading team with a strong trading strategy, reduces the risk of extreme prices in comparison to an inhouse purchasing option.

9 Staffing HR Implications

The Contract will require management & monitoring and an existing team (financially supported through a contractual rebate) already exist.

10 Conclusion

In conclusion, it is recommended that Cabinet approve for the award of the gas supply contract through the NEPO Gas Framework for a three year plus one year contract, in order to secure value for money and excellent customer service. Also, that the recommended delegations of authority be authorised to enable timely contract management.

Alternative Options Considered and Rejected

Option 1

Do nothing – In order to comply with UK Procurement Legislation, and due to the 12- 18 month lead in times, it is necessary to now either re-procure the above contract directly to market by Sefton Council via the Public Contract Regulations route, or receive a supply contract available from an Public Contract Regulations compliant Energy Procurement Framework with a Central Purchasing Body (CPB). Therefore, this action was rejected.

Option 2

Delay this decision - The lead time for making a change to our current gas supply arrangements is significant, so any delay in making a decision would shorten our window for purchasing gas in advance. This would reduce our options and increase the risk associated with market conditions during that time. Therefore, this action was rejected.

Option 3

Adopt a different procurement strategy – for example purchasing all gas supplies at a fixed price. Whilst Sefton has used this strategy in the past and made savings from it, it does internalise the risk associated with achieving the best prices, increases staff workload and given current volatility in the wholesale gas market increases the risks associated with achieving a competitive price. Therefore, this option was rejected.

Equality Implications: There are no equality implications.
Impact on Children and Young People: N/A
Climate Emergency Implications: The recommendations within this report will have a Negative impact. The arrangements cover significant proportion of the remaining period within which the Council has declared it will become Net Zero (by 2030). Gas consumption is a key element of the Council's carbon footprint, which we need to reduce to zero (or net) by 2030. The use of Gas, options to reduce, minimise and offset the remaining proportion of Sefton Councils Scope 1 carbon emissions (Direct emissions from gas consumption) is therefore of significance in reaching this target. Within all current frameworks there exists the option to purchase green gas certification, however, the supply of this is very limited and where available, the costs are higher than normal gas. Efforts to 'decarbonise' our buildings and remove gas/ reduce gas usage remain the focus of the net zero strategy & action plan.

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What consultations have taken place on the proposals and when?

(A) Internal Consultations

The Executive Director of Corporate Resources and Customer Services (FD.7882/24) and the Chief Legal and Democratic Officer (LD.5982/24) have been consulted and any comments have been incorporated into the report.

(B) External Consultations

N/A

Implementation Date for the Decision :

Following the expiry of the “call-in” period for the Committee decision.

Contact Officer:	Stephanie Jukes
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Appendices:

The following appendix is attached to this report:

Appendix 1 – Evaluation questions and weightings.

Background Papers: N/A

Appendix 1 – Evaluation questions and weightings.

	PASS/FAIL	
General	Framework must Public Contract Regulations complaint?	Pass/Fail
Quality	Assurance that Systemslink is fully compatible with billing/data from supplier(s)?	Pass/Fail
	Assurance the Bureau Service to check our bills are correct and ensure low impact on our team's capacity is compatible.	Pass/Fail
	Assurance separate billing for some of our sites is possible. Some of our sites prefer to pay their bills separately, such as academies and our care provider.	Pass/Fail
	Some of our sites may prefer a Direct Debit option, can your supplier(s) provide this?	Pass/Fail
	We will require the facility to add a commission, can this option be provided?	Pass/Fail
	Would we have a facility to be able to access our portfolio and bills via a supplier web portal and allow access to external sites that need it?	Pass/Fail
Scoring area	What this looks like	Suggested score weighting
A well-managed approach to purchasing/risk in the market	<p>A well-managed approach to purchasing and dealing with risks within the market</p> <p>Includes purchasing strategy, options and periods available</p> <p>How changes are managed responsibly (e.g. governance) should changes be required</p>	30%

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	<p>Protection from portfolio size/demand change and how this can be covered to avoid things like sell-back</p> <p>Wanting a better than average price with the approach without being overly risky.</p> <p>Consortium purchasing.</p>	
<p>Previous performance</p>	<p>Demonstration of range of what team covers and size</p> <p>Evidence of Market performance. I.e. what reports are available and what they are showing too in terms of performance</p> <p>Size of customer basket (market share/total MW etc)</p>	<p>30%</p>
<p>Impact on operations</p>	<p>We want good customer service, access to dedicated staff, portal and information that is sent out</p>	<p>20%</p>

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	<p>Stable and ideally single supplier, not changing too often/more than necessary. This could include having a single supplier as well as when current framework expires and new one potentially comes about</p> <p>AMR data collector service. Impact of change of supplier</p> <p>Portal access, supplier web portal capable of our and our partners needs</p> <p>Minimise the impact from involvement of the team both in switching and in day to day operations</p>	
Net Zero Objectives and Social Value	Green Gas options? Offsetting options?	20%

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	<p>Wider Support (funding/support) regarding Net-zero/decarbonisation?</p>	
	<p>The ability to provide/deliver good local social value.</p>	
	<p>General Social Value provision, aligned with our values</p>	

Scoring Scheme :		
Assessment	Interpretation	score
Very Good	<p>Exceeds the Requirement. Exceptional demonstration by the Bidder of the relevant ability, understanding, experience, skills, resources and quality measures required to provide the supplies/services. Response offers multiple demonstrated evidence and examples in support.</p>	5
Good	<p>Satisfies the requirement with minor additional benefits. Above average demonstration by the Bidder of the relevant ability, understanding, experience, skills, resources and quality measures required to provide the supplies/services. Response offers demonstrated evidence and examples in support.</p>	4

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Capable	Satisfies the requirement. Demonstration by the Bidder of the relevant ability, understanding, experience, skills, resources and quality measures required to provide the supplies/services.	3
Potential	Satisfies the requirement with minor reservations. Information indicating potential to deliver outcomes. Some minor reservations of the Bidder's relevant ability, understanding, experience, skills, resources and quality measures required to provide the supplies/services, with little or no evidence to support the response.	2
Reservations	Satisfies the requirement with major reservations. Considerable reservations of the Bidder's relevant ability, understanding, experience, skills, resources and quality measures required to provide the supplies/services, with little or no evidence to support the response.	1
Unacceptable or no response	Does not meet the requirement. Does not comply and/or insufficient information provided to demonstrate that the Bidder has the ability, understanding, experience, skills, resources and quality measures required to provide the supplies/services, with little or no evidence to support the response. Or, no response at all.	0

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Cabinet Report		Sefton Council 	
Report Title:		Sefton Hospitality Operations Limited – Business Plan Update	
Date of meeting:	9 January 2025		
Report to:	Cabinet		
Report of:	Executive Director - Regeneration, Economy and Assets		
Portfolio:	Cabinet Member – Regeneration, Economy and Skills		
Wards affected:	All Wards		
Is this a key decision:	Yes	Included in Forward Plan:	Yes
Exempt/confidential report:	No		

Summary:

The report provides Cabinet with an update on the performance of Sefton Hospitality Operations Limited, with an updated strategy and business plan. The update includes an overview on economic and market conditions, as these continued sectoral challenges provide the context for the status and future of the business and its venues. Also included are updates on operational activities, alongside recent and forecast financial performance.

Recommendation(s):

- (1) Note the outturn for the company for the financial year 2023-24, the forecast for financial year 2024-25, and the factors influencing those outturns;
- (2) Note the continued challenges affecting the economy and the hospitality sector, and future outlook for both, and how they have affected and will continue to affect the company;
- (3) Approve the updated strategy and business plan for the company.

Reasons for the Recommendation(s):

The role of Sefton Hospitality Operations Limited (SHOL) remains focused on the delivery of an experience for customers that aligns with the vision and objectives of the borough and the council. In addition to revitalisation of, and the maximisation of opportunity from, underused assets in Sefton, SHOL and its strategy continues to enable support for local people with access to higher-quality career opportunities in the hospitality sector. As previously, this model also delivers best

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value to the Council (via the removal of the subsidy formerly required to the previous hospitality offer at CLAC). The Council as shareholder remains committed to the long-term future of the company and its operations. With regards to governance and board composition, the Cabinet has delegated powers set out in Chapter 5, Paragraph 40 of the Constitution to appoint the Council's representatives to serve on Outside Bodies.

1. The Rationale and Evidence for the Recommendations

- 1.1 In February 2021 the Cabinet approved the full business case for Crosby Lakeside Adventure Centre (CLAC), comprising a new hospitality operating model and the related building enhancements. This business case recommended the formation of Sefton Hospitality Operations Limited (SHOL), intended to operate hospitality venues across Sefton including, but not limited to, the venue at CLAC now known as the Lake House. The business was incorporated in 2021, with a strategy and business plan approved by Cabinet in February 2022, in advance of the completion of the CLAC building enhancements and the opening of the Lake House later in that year. These enhancements and changes to the operating model enabled removal of the subsidy from the Council previously provided to the venue, and the maximisation of the offer at the venue.
- 1.2 This report provides an update on strategy for the company, and an updated business plan, in the context of continued challenges for the economy and for the hospitality sector, albeit with sustained confidence in the long-term future of the industry and of the business.

2. Economy and Hospitality Sector

- 2.1 The trading environment for the hospitality sector continues to see significant changes and challenges due to cost-of-living crisis, inflation and other factors impacting on our local area. It has been well documented that the hospitality sector has and is facing challenges, in areas such as cost of utilities and consumables, with both having a direct impact on the market, and both affecting SHOL's venues and the Council's other assets in the sector.
- 2.2 According to the National Restaurants Association, 60% of hospitality venues are reported to fail in year one, and 80% are reported to fail within the first five years – with failure rates increasing in 2022 and 2023 given current economic conditions. There also continues to be a difficult trading environment in UK coastal destinations as the UK outbound market recovers coupled with the pressure on people's disposable income. The challenges of opening a new hospitality venue at any time are exacerbated by increasing cost pressures affecting sector-wide profitability, with venues such as the Lake House, and Southport Market, seeing more than 100% increases in energy bills during the business plan period.
- 2.3 In recent years, the UK restaurant industry has been heavily impacted by factors beyond operators' control, and the financial year of 2023/24 was no different. It was another challenging year across the sector, with stubbornly high inflation, rising interest rates, the cost-of-living crisis and geopolitical tensions increasing pressure on both businesses and customers. The cost-of-living crisis was a prevailing theme in the UK throughout last year. Both businesses and consumers alike navigated a challenging year of record inflation driving high levels of cost.

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- 2.4 According to BDO in their latest bars and restaurants report, the high inflationary environment has created behaviours akin to an hourglass economy where the premium and value end of the market receives the most traction, squeezing out the middle-income spending patterns. This was one of the main customer groups targeted by SHOL, and also by Southport Market.
- 2.5 In their report BDO also state that Consumer confidence remained volatile through 2023 and household disposable income remains below levels observed pre-2023, which will continue to be the hospitality sector's main challenge for the upcoming year as consumers look to stretch the value of each pound spent.
- 2.6 It is forecasted that the hospitality industry will continue to face uncertainty in the short and medium term as household disposable income continues to be squeezed and while inflation has fallen, food inflation continues, and those costs continue to be passed onto the consumer.
- 2.7 These factors significantly impact Sefton as a borough, and as an organisation, as well as SHOL. Hospitality, leisure and tourism are major parts of Sefton's economy, and beyond SHOL the Council has numerous assets and other operations within the sector. Therefore, monitoring and reporting of economic and market conditions is undertaken collaboratively between the Council and the company, and the Council will continue to engage with external businesses, partners and stakeholders on challenges and opportunities for the sector.

3. Company Strategy

- 3.1 Notwithstanding the continued challenges facing the sector, and facing SHOL and all other businesses, the strategy for the company in many respects remains unchanged.
- 3.2 As per the original business case, the focus for SHOL remains on being an employer of choice in the hospitality sector. As per previous commitments, this focuses principally on offering full-time, permanent employment opportunities, with all roles paying a real living wage or above (and the Business Plan remains based on this same assumption, despite continued cost pressures). These terms and conditions are one part of an attractive and differentiated offer to employees, ensuring that the company attracts, develops and retains staff, particularly from Sefton and from the areas local to the company's venues.
- 3.3 This offer has included training and development opportunity, working towards long-term career growth in the hospitality sector, and is complemented by the ethos and core values of the company that should ensure an organisational culture of which employees wish to be a part.
- 3.4 The intention remains for the company to offer a quality experience for employees, who in turn will deliver a quality experience for customers – this strategic approach is not uncommon at the “higher end” of many sub-segments of the retail sector. This employment offer also aligns with the core values of the borough, and SHOL offers

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employment opportunity for a number of cohorts, aligned to the Council's priority areas. For example the company is a signatory to the Council's Caring Business Charter, supporting care experienced young people with training, work experience and employment opportunity.

- 3.5 Of the organisation's workforce, 49% of whom are Sefton residents, and 100% of whom are residents of the Liverpool City Region. 51% of the workforce is female, and 40% of the workforce is under the age of 23.
- 3.6 All staff members have received Full Flow Health and Safety training, and all are undertaking a training programme in their relevant area of work. There continue to be cases of internal promotion and progression in the business, in accordance with the desire to support career progression for employees in the business and in the sector. There are also employees who have come to business through effective working partnership with Sefton at Work – this includes individuals who were not in employment, and individuals who had never been in employment.
- 3.7 Given continued widespread challenges in the hospitality sector, the company strategy proposes a selective focus during 2025. Principally, this comprises focus on maximisation of the opportunity at the Lake House in Waterloo, which has seen significant increases in footfall and revenue since its opening. Revenues are generally 33% higher at the Lake House in 2024 than they were in the corresponding months of 2023. Focus is therefore on building on this strong start, despite market conditions, to further strengthen the quality of the customer offer, to further enhance the internal and the external space itself, and to continue to drive financial performance in terms of both revenue and profitability.
- 3.8 The company ceased operations at the White House in Southport in 2024, and the Council has secured a new tenant for the space in question. The company has worked with the Council and that tenant, given the circumstances, to support a quick relocation to these premises, and in providing for example surplus furniture to the new operator of the space to enable their quick reopening and resumption of their work with communities.
- 3.9 The strategy proposes to focus on the Lake House, as above, while market conditions remain uncertain in 2025, and the Council and the company will continue to monitor this on an ongoing basis. The next annual update on strategy and business plan in late 2025 will revert on this matter, and any material variations to strategy or business plan will be reported to the shareholder and to the Cabinet in the interim.
- 3.10 While operating only one venue, the company will manage overhead and other costs effectively to support financial performance of the company. The company and the Council will continue to work together to explore longer-term opportunities in related sectors where there may be opportunity for SHOL, and where the experience and expertise of the management team may be beneficial.

4. Business Plan Update

- 4.1 The previous iteration of the business plan assumed an improvement in financial performance of the company in the coming years due to steady economic recovery and improved outlook for the hospital

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the Lake House and at the White House, and due to selective growth at new venues during the period.

- 4.2 As outlined in section 2, conditions remain challenging for the hospitality sector and for all businesses therein, so the recovery to economy and the outlook for the sector has not taken place yet to the extent required.
- 4.3 In respect of the venues, the Lake House has continued to improve significantly in performance by every measure, but it has proven more challenging at the White House in Southport, where footfall and demand have not met aspirations. Southport's hospitality sector is competitive, with new venues emerging in the last 12 months where significant (seven-figure) expenditure has been undertaken to deliver venues that offer the quality of customer and dining experience that makes their out-of-town centre location a "destination". The White House refurbishment was funded at no cost to the Council, by the company via the shareholder loan, and that investment was not of the same scale to compete with such spend elsewhere. As per the strategy outlined in section 3, the Council and the company do not propose to make multi-million pound investments in the White House at this time given uncertainty in many parts of the hospitality sector. Nevertheless, the Council has received, at no cost to itself, a restored asset that is now occupied by a rent-paying tenant.
- 4.4 This selectivity also means that there is no new investment in other venues during the period, and therefore no financial impact of those increased revenues during the plan period.
- 4.5 The table below provides the forecast net income for the business for the previous financial year, the current year, and the next financial year.

EBIT £k	FY 2023-24	FY 2024-25	FY 2025-26
Forecast Business Plan (Dec'24)	-625	-346	60

- 4.6 The variance derives from:
- Continued challenging market conditions, as per section 2;
 - Utility bills beyond originally anticipated levels, accounting for a circa £120k per annum variance in each financial year;
 - Due to the company being Council-owned, in terms of business rates it is not eligible for Retail, Hospitality and Leisure relief (as much as 75% during the period);
 - White House performance not meeting aspirations; and
 - Improvements in financial performance at the Lake House.
- 4.7 The previous business plan anticipated repayment of the shareholder loan, and any dividends, commencing from year 6 of the business (financial year 2026-27 onwards). Although this is outside the period of the update reported herein, this remains the target for the business and its Board. As previously stated, this will be reevaluated on an annual basis, and an updated three-year business plan will be delivered in late 2025, but it can be seen that there has been substantial improvement in financial performance in 24/25 which is forecast to continue into 25/26 when the lake house will deliver a modest profit.

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4.8 At the end of 2024/25 (the current financial year) the company will have drawn down the full £1.4m of the approved loan agreed by Cabinet. It can be seen from the table at 4.5 that with the company trading positively from 2025/26 based on current assumptions this should mean no further drawdowns to support the annual position but there could potentially be some further requirement to fund cashflow especially during quieter months e.g. November and January.

4.9 As stated earlier upon inception of the company, the £0.208m of subsidy to the asset ended therefore this has resulted in a cumulative saving of £0.762m being made by the Council which has been used to support front line services. At the end of this three-year period, i.e., 25/26, this will have increased to £0.980m compared to the current loan value of £1.4m.

5. Governance and Risk

5.1 Each of the Council’s wholly-owned companies is governed by a Board of Directors, who in turn report to a shareholder representative. From an operational management perspective, leadership structures and operational procedures are in place to support business performance and growth, with the senior management team reporting into the board on a monthly basis. In the long-term, the aim remains to replace the Council officers on the board with independent directors. Approval of any changes and appointments will be in accordance with the company’s scheme of delegation and in accordance with the Council’s procedure rules for appointment to external bodies where applicable.

5.2 During 2024 the Council’s internal audit team has undertaken a review of risk management in the company, with a series of recommendations implemented for consistency of approach with both the Council and the other wholly-owned companies.

5.3 Each of the Council’s wholly-owned companies has a risk register in place. SHOL’s key risk areas are summarised below:

Risks	Potential Impacts	Mitigating Actions
Prolonged economic challenges and hospitality market conditions	Continued impact on customer demand, footfall, costs and revenues	<ul style="list-style-type: none"> * Commercial management of venue operations and costs. * Proactive marketing and delivery of offer differentiated by quality in a competitive sector. * Selectivity in venue offering and growth while uncertainty remains. * Continued monitoring of market conditions and outlook in partnership with the Council – including part of company’s board reporting.
Continued cost inflation pressures	Impact on venue and company profitability	<ul style="list-style-type: none"> * Commercial management of venue operations and costs. * Continued focus at venue and business level on procurement and efficiency opportunities while sustaining quality of offer.

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		<ul style="list-style-type: none"> * Selectivity in venue offering and growth while uncertainty remains. * Continued monitoring of market conditions and outlook in partnership with the Council – including part of company’s quarterly board reporting.
Retention of leadership and management team in a competitive environment	Loss of leadership from cultural, operational and commercial perspective would impact company performance.	<ul style="list-style-type: none"> * Formal and informal relationships with, agreements with, and support for leadership and management team to ensure retention (led at Board level).
Attraction and retention of staff in a competitive environment	Impacts operational and commercial performance of venues, impacting customer experience	<ul style="list-style-type: none"> * Continued quality of employment offer to all workforce (T&Cs, culture, training and progression opportunity) * Continued focus on market conditions and outlook
Performance of existing and new venues does not meet expectations	Failure to achieve Business Plan targets	<ul style="list-style-type: none"> * Retain strength of operational and commercial leadership team, processes and culture * Commercial management structures to enable daily and weekly forecasting and reporting at venue and at business level * Monthly financial reporting to Board and quarterly financial reporting to shareholder to ensure early visibility of performance * Selectivity in approach to growth, and in continuity at venues where expectations not met.

6. Conclusion

6.1 External factors continue to severely affect all businesses in the hospitality sector. The cost of living crisis has affected customer demand and revenues across the industry, and severe cost inflationary pressures (especially in energy costs and food costs) have impacted profitability as not all costs can be passed through to customers in such a competitive environment.

6.2 Despite these economic pressures, the business is operating a venue in the Lake House asset that has been transformed in recent years, and that are now attracting strong footfall and good reputation. The operation has also enabled removal of the previous subsidy to the venue from the Council, which totals circa £1m across the period since inception of the company. Moreover, the Council has also had restored, at no cost, the White House in Southport, which is now occupied by a new rent-paying tenant.

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6.3 The Council remains committed to the long-term future of the business. Despite current economic challenges, there is confidence in the long-term future for the sector, for the venues, and in the opportunity for growth. Particularly, the Lake House is proving to be a well-established and highly-regarded venue in a beautiful Sefton location, and there is confidence in the long-term opportunity for this asset.

6.4 The business and the Council as shareholder remain wholly committed to the creation and maintenance of these prospects for local people, and to the role of the company and its venues as a key partner in the communities in which it operates.

2. Financial Implications - What will it cost and how will it be financed?

(A) Revenue Costs

All financial implications are discussed within the report.

(B) Capital Costs

All financial implications are discussed within the report.

3. Legal Implications

All legal implications are considered within the report.

4. Corporate Risk Implications

All risk implications are considered within the report

5 Staffing HR Implications

All resource implications are considered within the report.

6 Conclusion

The updated strategy and business plan are commended.

Alternative Options Considered and Rejected

No other options were considered by the Council. The company, as part of its strategy and business planning process, has considered options for the business and its current and potential future venues, although some aspects of that review process will be commercially sensitive and confidential.

The vision and values, strategy and operating procedures of the company will align with the ethos of the Council, in respect of equalities, and will continue to be reflected in all areas, including recruitment, procurement, etc. This is evident in the operating performance of the company to date, as reported to its board members, and underpins approach to future opportunity and growth for the company. In respect of employment, SHOL remains focused on offering attractive job and career opportunities to local people from a diverse range of backgrounds, and this is evident in the workforce at The Lake House, for example. The offer at The Lake House remains inclusive, with community access to facilities and the provision of a Changing Places unit, as per the Council's intentions for all capital projects of this scale and importance. The company and its leadership remain focused on the development and maintenance of community relationships to ensure inclusive growth in line with the vision and values of its shareholder, Sefton Council, and this ethos is being embedded as part of the culture of the organisation for all new employees as part of induction and other people-related processes.

Impact on Children and Young People:

Both as an employer and as a venue operator, the business has outcomes for children and young people at the centre of strategy and business plan. The quantity and quality of employment opportunity being offered by the company is providing pathways into careers in the hospitality sector for young people across Sefton. The company is a signatory and an active partner in the Council's Caring Business Charter, and is active through its events and ongoing operations as a partner in its communities.

Climate Emergency Implications:

The recommendations within this report will have a Neutral impact.

Given the increases and scale of utility costs at the building that includes (but is not limited to) the Lake House at Waterloo, the Council's energy team is reviewing options to improve energy management performance from both a cost and an environmental perspective.

What consultations have taken place on the proposals and when?

(A) Internal Consultations

The Executive Director of Corporate Resources and Customer Services (FD.7855/24) and the Chief Legal and Democratic Officer (LD.7855/24) have been consulted and any comments have been incorporated into the report.

(B) External Consultations

There have been no external consultations.

Implementation Date for the Decision :

Following the expiry of the "call-in" period for the Minutes of the Cabinet Meeting.

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Appendices:

There are no appendices to this report

Background Papers:

There are no background papers available for inspection.

Report Title Programme of Meetings – 2025/26 Municipal Year

Date of meeting:	9 January 2025 16 January 2025		
Report to:	Cabinet Council		
Report of:	Chief Legal and Democratic Officer		
Portfolio:	Corporate Services		
Wards affected:	All		
Is this a key decision:	No	Included in Forward Plan:	No
Exempt/confidential report:	No		

Summary:

To seek approval of a Programme of Meetings for the 2025/26 Municipal Year.

Recommendations:

Cabinet

That the Programme of Meetings for the Cabinet, Public Engagement and Consultation Panel, Safer Sefton Together and the Health and Wellbeing Board for 2025/26 as set out in Annexes A and D of the report be approved.

Council

- (1) the Programme of Meetings for the Council, Member Briefing Sessions; Regulatory Committees; and Overview and Scrutiny Committees for 2025/26 as set out in Annexes B and C of the report be approved; and
- (2) the Programme of Meetings for the Cabinet, Public Engagement and Consultation Panel, Safer Sefton Together and the Health and Wellbeing Board for 2025/26 as set out in Annexes A and D of the report be noted.

1. The Rationale and Evidence for the Recommendations

- 1.1 The Council is required to establish a programme of meetings for the 2025/26 Municipal Year.
- 1.2 Annexes are attached to the report setting out the suggested programme.

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1.3 Similar to the arrangements put in place last year once the programme of meetings have been approved, an “in-house” diary will be produced for Members of the Council.

1.4. Programme of Meetings 2025/26

1.5. The key principles of the Programme of Meetings are as follows:

- Four Ordinary Council Meetings to be held every 8 weeks on a Thursday commencing at 6.30 p.m. plus the Budget Council Meeting to be held on 26 February 2026.
- Council will not meet on the same day as Cabinet.
- Members’ Briefing Sessions to be held at 5.00 p.m. prior to the four Ordinary Council Meetings.
- No meetings will be held:
 - In the period between Christmas and New Year (December 2025/January 2026)
 - In April 2026 except for the meetings of the Planning Committee, and Cabinet.
- As far as possible no meetings will be held during the school half term holiday weeks.
- The programme of meetings indicates that all meetings will alternate between Bootle and Southport Town Halls.
- Cabinet Meetings to be held on a Thursday at 10.00 a.m. The first meeting to be held on 22 May 2025.
- Planning Committee to meet every four weeks on a Wednesday.
- Planning Visiting Panel to meet 2 days prior to each meeting of the Planning Committee to undertake site visits as agreed by the Committee.
- Each of the 4 Overview and Scrutiny Committees to meet bi-monthly, 5 times during the year commencing at 6.30 p.m. – Overview and Scrutiny work will also be undertaken by Informal Meetings or Working Groups established on an ad hoc basis.
- Special meeting of the Overview and Scrutiny Committee (Regulatory, Compliance and Corporate Services) to be held on 10 February 2026 to scrutinise the Cabinet budget process.
- Overview and Scrutiny Management Board to meet 5 times per year, commencing at 4.30 p.m. These meetings will be held remotely
- Licensing and Regulatory Committee to meet quarterly on a Monday commencing at 6.30 p.m.
- Meetings of the Licensing Sub-Committee to be convened as and when required.
- Audit and Governance Committee to meet every quarter (4 meetings per year) on a Wednesday commencing at 3.00 p.m. in order to meet statutory requirements etc. A special meeting of the Committee will be held on 24 September 2025 to audit the Statement of Accounts
- Pay and Grading Committee to be convened as and when required.
- Health and Wellbeing Board to meet 4 times per year.
- The dates for the Public Engagement and Consultation Panel, which are not public meetings are included in the Corporate Calendar.

1.6. Calendar of Meetings

1.7 A copy of the Calendar of Meetings for 2025/26 and associated annexes are attached.

2. Financial Implications

- (A) Revenue Costs – None
- (B) Capital Costs – None

3. Legal Implications

None

4. Risk Implications

None

5 Staffing HR Implications

None

6 Conclusion

As mentioned above, once the programme of meetings have been approved, an “in-house” diary will be produced for Members of the Council.

Alternative Options Considered and Rejected

None. The Council is required to produce a programme of meetings.

Equality Implications:	
There are no equality implications.	
Impact on Children and Young People:	
There are no direct implications impacting on children and young people arising from this report. Any impact on children and young people arising from the consideration of reports considered at meetings contained in the programme will be contained in such reports when they are presented to Members at the appropriate time.	
Climate Emergency Implications:	
The recommendations within this report will	
Have a positive impact	No
Have a neutral impact	Yes
Have a negative impact	No
The Author has undertaken the Climate Emergency training for report authors	Yes
There are no direct climate emergency implications arising from this report. Any climate emergency implications arising from the consideration of reports referred to in the programme will be contained in such reports when they are presented to Members at the appropriate time.	

What consultations have taken place on the proposals and when?

(A) Internal Consultations

The Executive Director of Corporate Services Commercial (FD7887/24) has been consulted and notes there are no direct financial implication. Page 129

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The Chief Legal and Democratic Officer (LD5987/24) is the author of this report.

Chief Executive
Executive Director of Corporate Services and Commercial
Assistant Director - Strategic Support
Assistant Director - Communities
Director of Public Health
Chief Planning Officer

(B) External Consultations

None

Implementation Date for the Decision:

In respect of the Programme of Meetings for the Cabinet, Public Engagement and Consultation Panel, Safer Sefton Together and the Health and Wellbeing Board the implementation date will be upon the expiry of the call-in period of the minutes of the Cabinet meeting.

In respect of the Programme of Meetings for the Council, Member Briefing Sessions; Regulatory Committees; and Overview and Scrutiny Committees - immediately following the Council meeting.

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Appendices:

Annex A - Programme of Meetings for the Cabinet in 2025/26

Annex B - Programme of Meetings for the Council, Members' Briefing Sessions and Regulatory Committees in 2025/26

Annex C - Programme of Meetings for the Overview and Scrutiny Committees in 2025/26

Annex D - Programme of Meetings for the Public Engagement and Consultation Panel, Sefton Safer Communities Partnership and the Health and Wellbeing Board in 2025/26
Calendar of meetings 2025/26

Background Papers:

There are no background papers available for inspection.

ANNEX A
METROPOLITAN BOROUGH OF SEFTON
PROGRAMME OF CABINET MEETINGS - 2025/2026

Meeting	Day	Time	Venue	2025								2026					
				May	June	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	
CABINET	Thur.	10.00 a.m.	B	22		24				2		4		5	5		21
			S		19				4		6		8	→12		2	

→ Budget Meeting

Key to Venues:

B - Bootle Town Hall

S - Southport Town Hall

ANNEX B
METROPOLITAN BOROUGH OF SEFTON
PROGRAMME OF COUNCIL, MEMBERS' BRIEFING SESSIONS AND REGULATORY COMMITTEE MEETINGS ETC. - 2025/2026

Meeting	Day	Time	Venue	2025								2026						
				May	June	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	June	
COUNCIL	Thur.	6.30 p.m.	B	15←					11				15	26→			14°	
			S	13↑		10				13								12↓ Tue
MEMBERS' BRIEFING SESSIONS Prior to each Ordinary Council Meeting. Confirmation that Briefing Sessions will be held will be notified to Members nearer the time	Thur.	5.00 p.m.	B						11				15					
			S			10				13						23		
AUDIT AND GOVERNANCE COMMITTEE	Wed.	3.00 p.m.	B		18				*24			10						
			S						3						18			
EVALUATIONS (FOR PERSONNEL RESOURCES) - as and when required	Thur.	-	B															
			S															
LICENSING AND REGULATORY COMMITTEE	Mon.	6.30 p.m.	B		9							5						
			S						1						9			
LICENSING SUB-COMMITTEE - as and when required			B															
			S															
PLANNING COMMITTEE (Note: Mandatory meetings to start at 5.00 p.m. Meeting on 21/05 on Tue)	Wed.	6.30 p.m.	B	↓20	25				17		12	14		11			↓20	
			S		4	23				15		10		4		8		
PLANNING VISITING PANEL	Mon	10.00 a.m.	B		2 & 23	21		15	13	10	8	12	2	9	7			
PAY AND GRADING COMMITTEE - as and when required																		

↑ Annual Meeting 2025/26 - commences at 6.00 p.m. (Tuesday) (Venue to be determined)

← Adjourned Annual Meeting - Appointment of Committees etc. for 2025/26

→ Budget Meeting

↑Mandatory Planning Committee - To start at 5.00 p.m.

↓ Annual Meeting 2026/2027 - commences at 6.00 p.m. (Tuesday) (Venue to be determined)

° Adjourned Annual Meeting - Appointment of Committees etc. for 2026/2027

* Audit & Governance - Approval of 2024/25 Statement Of Accounts

ANNEX C
METROPOLITAN BOROUGH OF SEFTON
PROGRAMME OF MEETINGS FOR OVERVIEW AND SCRUTINY COMMITTEES - 2025/2026
(Tuesday)

Meeting	Venue	2025								2026				
		May	June	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May
OVERVIEW AND SCRUTINY COMMITTEE (Adult Social Care and Health) (6.30 p.m.) (Tue)	B		17				14					24		
	S					2				6				
OVERVIEW AND SCRUTINY COMMITTEE (Regulatory, Compliance and Corporate Services) (Tue) (6.30 p.m.)	B					9				13	*10			
	S		10				21					3		
OVERVIEW AND SCRUTINY COMMITTEE (Regeneration and Skills) (6.30 p.m.) (Tue)	B		24						4			10		
	S					16				20				
OVERVIEW AND SCRUTINY COMMITTEE (Children's Services Safeguarding) (p.m.) (Tue)	B		3						11			17		
	S					23				27				
OVERVIEW AND SCRUTINY MANAGEMENT BOARD (4.30 p.m.) (Tue)	Remote Meetings		17			9			11		6		10	

* Special meeting to consider Budget proposals.

ANNEX D
METROPOLITAN BOROUGH OF SEFTON
PROGRAMME OF MEETINGS FOR PARTNERSHIP MEETINGS- 2025/2026

Meeting	Day	Time	Venue	2025								2026				
				May	June	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May
PUBLIC ENGAGEMENT AND CONSULTATION PANEL ^	Fri	10.00 a.m.	B	23		11		5		7		16		6		
			S													
SAFER SEFTON TOGETHER	Thu	10.00 a.m.	B		5	31		11		13		15		26		
			S													
HEALTH AND WELLBEING BOARD	Wed.	2.00 p.m.	B		4			10			3			4		
			S													

Meetings video conferenced to Southport Town Hall

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SEFTON COUNCIL CALENDAR OF MEETINGS 2025/26

MAY 2025		
THU	1	
FRI	2	
SAT	3	
SUN	4	
MON	5	BANK HOLIDAY
TUE	6	
WED	7	
THU	8	
FRI	9	
SAT	10	
SUN	11	
MON	12	
TUE	13	6.00 ANNUAL COUNCIL (VENUE TO BE DETERMINED)
WED	14	
THU	15	6.30 ADJOURNED ANNUAL COUNCIL (B)
FRI	16	
SAT	17	
SUN	18	
MON	19	
TUE	20	5.00 MANDATORY PLANNING COMMITTEE TRAINING SESSION (B)
WED	21	
THU	22	10.00 CABINET (B)
FRI	23	10.00 PUBLIC ENGAGEMENT AND CONSULTATION PANEL (B)
SAT	24	
SUN	25	
MON	26	SPRING BANK HOLIDAY SCHOOL HALF-TERM HOLIDAY WEEK
TUE	27	
WED	28	
THU	29	
FRI	30	
SAT	31	
MAY 2025		

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JUNE 2025		
SUN	1	
MON	2	10.00 PLANNING VISITING PANEL (B)
TUE	3	6.30 OVERVIEW AND SCRUTINY (CHILDREN'S SERVICES AND SAFEGUARDING) (B)
WED	4	2.00 HEALTH AND WELLBEING BOARD (B) 6.30 PLANNING COMMITTEE (S)
THU	5	10.00 SAFER SEFTON TOGETHER (B)
FRI	6	
SAT	7	
SUN	8	
MON	9	6.30 LICENSING AND REGULATORY (B)
TUE	10	6.30 OVERVIEW AND SCRUTINY (REGULATORY, COMPLIANCE AND CORPORATE SERVICES) (S)
WED	11	
THU	12	
FRI	13	
SAT	14	
SUN	15	
MON	16	
TUE	17	4.30 OVERVIEW AND SCRUTINY MANAGEMENT BOARD (RM) 6.30 OVERVIEW AND SCRUTINY (ADULT SOCIAL CARE AND HEALTH) (B)
WED	18	3.00 AUDIT AND GOVERNANCE (B)
THU	19	10.00 CABINET (S)
FRI	20	
SAT	21	
SUN	22	
MON	23	10.00 PLANNING VISITING PANEL (B)
TUE	24	6.30 OVERVIEW AND SCRUTINY (REGENERATION AND SKILLS) (B)
WED	25	5.00 PLANNING TRAINING SESSION (B) 6.30 PLANNING COMMITTEE (B)
THU	26	
FRI	27	
SAT	28	
SUN	29	
MON	30	
JUNE 2025		

Agenda Item 9

JULY 2025		
TUE	1	
WED	2	
THU	3	
FRI	4	
SAT	5	
SUN	6	
MON	7	
TUE	8	
WED	9	
THU	10	5.00 MEMBERS' BRIEFING - TBC (S) 6.30 COUNCIL (S)
FRI	11	10.00 PUBLIC ENGAGEMENT AND CONSULTATION PANEL (B)
SAT	12	
SUN	13	
MON	14	
TUE	15	
WED	16	
THU	17	
FRI	18	
SAT	19	
SUN	20	
MON	21	10.00 PLANNING VISITING PANEL (B)
TUE	22	
WED	23	5.00 PLANNING TRAINING SESSION (S) 6.30 PLANNING COMMITTEE (S)
THU	24	10.00 CABINET (B)
FRI	25	
SAT	26	
SUN	27	
MON	28	
TUE	29	
WED	30	
THU	31	10.00 SAFER SEFTON TOGETHER (B)

Agenda Item 9

AUGUST 2025		
FRI	1	
SAT	2	
SUN	3	
MON	4	
TUE	5	
WED	6	
THU	7	
FRI	8	
SAT	9	
SUN	10	
MON	11	
TUE	12	
WED	13	
THU	14	
FRI	15	
SAT	16	
SUN	17	
MON	18	
TUE	19	
WED	20	
THU	21	
FRI	22	
SAT	23	
SUN	24	
MON	25	SUMMER BANK HOLIDAY
TUE	26	
WED	27	
THU	28	
FRI	29	
SAT	30	
SUN	31	
AUGUST 2025		

Agenda Item 9

SEPTEMBER 2025		
MON	1	6.30 LICENSING AND REGULATORY (S)
TUE	2	6.30 OVERVIEW AND SCRUTINY (ADULT SOCIAL CARE AND HEALTH) (S)
WED	3	3.00 AUDIT AND GOVERNANCE (S)
THU	4	10.00 CABINET (S)
FRI	5	10.00 PUBLIC ENGAGEMENT AND CONSULTATION PANEL (B)
SAT	6	
SUN	7	
MON	8	
TUE	9	4.30 OVERVIEW AND SCRUTINY MANAGEMENT BOARD (RM) 6.30 OVERVIEW AND SCRUTINY (REGULATORY, COMPLIANCE AND CORPORATE SERVICES) (B)
WED	10	2.00 HEALTH AND WELLBEING BOARD (B)
THU	11	10.00 SAFER SEFTON TOGETHER (B) 5.00 MEMBERS' BRIEFING - TBC (B) 6.30 COUNCIL (B)
FRI	12	
SAT	13	
SUN	14	
MON	15	10.00 PLANNING VISITING PANEL (B)
TUE	16	6.30 OVERVIEW AND SCRUTINY (REGENERATION AND SKILLS) (S)
WED	17	5.00 PLANNING TRAINING SESSION (B) 6.30 PLANNING COMMITTEE (B)
THU	18	
FRI	19	
SAT	20	
SUN	21	
MON	22	
TUE	23	6.30 OVERVIEW AND SCRUTINY (CHILDREN'S SERVICES AND SAFEGUARDING) (S)
WED	24	3.00 AUDIT AND GOVERNANCE (B) (SPECIAL MEETING FOR APPROVAL OF 2023/24 STATEMENT OF ACCOUNTS)
THU	25	
FRI	26	
SAT	27	
SUN	28	
MON	29	
TUE	30	
SEPTEMBER 2025		

Agenda Item 9

OCTOBER 2025		
WED	1	
THU	2	10.00 CABINET (B)
FRI	3	
SAT	4	
SUN	5	
MON	6	
TUE	7	
WED	8	
THU	9	
FRI	10	
SAT	11	
SUN	12	
MON	13	10.00 PLANNING VISITING PANEL (B)
TUE	14	6.30 OVERVIEW AND SCRUTINY (ADULT SOCIAL CARE AND HEALTH) (B)
WED	15	5.00 PLANNING TRAINING SESSION (S) 6.30 PLANNING COMMITTEE (S)
THU	16	
FRI	17	
SAT	18	
SUN	19	
MON	20	
TUE	21	6.30 OVERVIEW AND SCRUTINY (REGULATORY, COMPLIANCE AND CORPORATE SERVICES) (S)
WED	22	
THU	23	
FRI	24	
SAT	25	
SUN	26	
MON	27	SCHOOL HALF-TERM HOLIDAY WEEK
TUE	28	
WED	29	
THU	30	
FRI	31	
OCTOBER 2025		

Agenda Item 9

NOVEMBER 2025		
SAT	1	
SUN	2	
MON	3	
TUE	4	6.30 OVERVIEW AND SCRUTINY (REGENERATION AND SKILLS) (B)
WED	5	
THU	6	10.00 CABINET (S)
FRI	7	10.00 PUBLIC ENGAGEMENT AND CONSULTATION PANEL (B)
SAT	8	
SUN	9	REMEMBRANCE SUNDAY
MON	10	10.00 PLANNING VISITING PANEL (B)
TUE	11	4.30 OVERVIEW AND SCRUTINY MANAGEMENT BOARD (RM) 6.30 OVERVIEW AND SCRUTINY (CHILDREN'S SERVICES AND SAFEGUARDING) (B)
WED	12	5.00 PLANNING TRAINING SESSION (B) 6.30 PLANNING COMMITTEE (B)
THU	13	10.00 SAFER SEFTON TOGETHER (B) 5.00 MEMBERS' BRIEFING- TBC (S) 6.30 COUNCIL (S)
FRI	14	
SAT	15	
SUN	16	
MON	17	
TUE	18	
WED	19	
THU	20	
FRI	21	
SAT	22	
SUN	23	
MON	24	
TUE	25	
WED	26	
THU	27	
FRI	28	
SAT	29	
SUN	30	
NOVEMBER 2025		

Agenda Item 9

DECEMBER 2025		
MON	1	
TUE	2	
WED	3	2.00 HEALTH AND WELLBEING BOARD (B)
THU	4	10.00 CABINET (B)
FRI	5	
SAT	6	
SUN	7	
MON	8	10.00 PLANNING VISITING PANEL (B)
TUE	9	
WED	10	3.00 AUDIT AND GOVERNANCE (B) 5.00 PLANNING TRAINING SESSION (S) 6.30 PLANNING COMMITTEE (S)
THU	11	
FRI	12	
SAT	13	
SUN	14	
MON	15	
TUE	16	
WED	17	
THU	18	
FRI	19	SCHOOL CHRISTMAS BREAK
SAT	20	
SUN	21	
MON	22	
TUE	23	
WED	24	
THU	25	CHRISTMAS DAY
FRI	26	BOXING DAY
SAT	27	
SUN	28	
MON	29	COUNCIL OFFICES CLOSED
TUE	30	COUNCIL OFFICES CLOSED
WED	31	COUNCIL OFFICES CLOSED
DECEMBER 2025		

Agenda Item 9

JANUARY 2026		
THU	1	NEW YEAR'S DAY
FRI	2	COUNCIL OFFICES CLOSED
SAT	3	
SUN	4	
MON	5	6.30 LICENSING AND REGULATORY (B)
TUE	6	4.30 OVERVIEW AND SCRUTINY MANAGEMENT BOARD (RM) 6.30 OVERVIEW AND SCRUTINY (ADULT SOCIAL CARE AND HEALTH) (S)
WED	7	
THU	8	10.00 CABINET (S)
FRI	9	
SAT	10	
SUN	11	
MON	12	10.00 PLANNING VISITING PANEL (B)
TUE	13	6.30 OVERVIEW AND SCRUTINY (REGULATORY, COMPLIANCE AND CORPORATE SERVICES) (B)
WED	14	5.00 PLANNING TRAINING SESSION (B) 6.30 PLANNING COMMITTEE (B)
THU	15	10.00 SAFER SEFTON TOGETHER (B) 5.00 MEMBERS' BRIEFING – TBC (B) 6.30 COUNCIL (B)
FRI	16	10.00 PUBLIC ENGAGEMENT AND CONSULTATION PANEL (B)
SAT	17	
SUN	18	
MON	19	
TUE	20	6.30 OVERVIEW AND SCRUTINY (REGENERATION AND SKILLS) (S)
WED	21	
THU	22	
FRI	23	
SAT	24	
SUN	25	
MON	26	
TUE	27	6.30 OVERVIEW AND SCRUTINY (CHILDREN'S SERVICES AND SAFEGUARDING) (S)
WED	28	
THU	29	
FRI	30	
SAT	31	
JANUARY 2026		

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FEBRUARY 2026		
SUN	1	
MON	2	10.00 PLANNING VISITING PANEL (B)
TUE	3	
WED	4	5.00 PLANNING TRAINING SESSION (S) 6.30 PLANNING COMMITTEE (S)
THU	5	10.00 CABINET (B)
FRI	6	
SAT	7	
SUN	8	
MON	9	
TUE	10	6.30 OVERVIEW AND SCRUTINY (REGULATORY, COMPLIANCE AND CORPORATE SERVICES) BUDGET MEETING (B)
WED	11	
THU	12	10.00 CABINET (BUDGET) (S)
FRI	13	
SAT	14	
SUN	15	
MON	16	SCHOOL HALF-TERM HOLIDAY WEEK
TUE	17	
WED	18	
THU	19	
FRI	20	
SAT	21	
SUN	22	
MON	23	
TUE	24	6.30 OVERVIEW AND SCRUTINY (ADULT SOCIAL CARE AND HEALTH) (B)
WED	25	
THU	26	6.30 BUDGET COUNCIL (B)
FRI	27	
SAT	28	
FEBRUARY 2026		

Agenda Item 9

MARCH 2026		
SUN	1	
MON	2	
TUE	3	6.30 OVERVIEW AND SCRUTINY (REGULATORY, COMPLIANCE AND CORPORATE SERVICES) (S)
WED	4	2.00 HEALTH AND WELLBEING BOARD (B)
THU	5	10.00 CABINET (B)
FRI	6	10.00 PUBLIC ENGAGEMENT AND CONSULTATION PANEL (B)
SAT	7	
SUN	8	
MON	9	10.00 PLANNING VISITING PANEL (B) 6.30 LICENSING AND REGULATORY (S)
TUE	10	4.30 OVERVIEW AND SCRUTINY MANAGEMENT BOARD (RM) 6.30 OVERVIEW AND SCRUTINY (REGENERATION AND SKILLS) (B)
WED	11	5.00 PLANNING TRAINING SESSION (B) 6.30 PLANNING COMMITTEE (B)
THU	12	
FRI	13	
SAT	14	
SUN	15	
MON	16	
TUE	17	6.30 OVERVIEW AND SCRUTINY (CHILDREN'S SERVICES AND SAFEGUARDING) (B)
WED	18	3.00 AUDIT AND GOVERNANCE (S)
THU	19	
FRI	20	
SAT	21	
SUN	22	
MON	23	
TUE	24	
WED	25	
THUR	26	10.00 SAFER SEFTON TOGETHER (B)
FRI	27	
SAT	28	
SUN	29	
MON	30	SCHOOL SPRING HOLIDAY
TUE	31	
MARCH 2026		

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APRIL 2026		
WED	1	
THU	2	10.00 CABINET (S)
FRI	3	GOOD FRIDAY
SAT	4	
SUN	5	EASTER SUNDAY
MON	6	EASTER MONDAY
TUE	7	10.00 PLANNING VISITING PANEL (B)
WED	8	5.00 PLANNING TRAINING SESSION (S) 6.30 PLANNING COMMITTEE (S)
THU	9	
FRI	10	
SAT	11	
SUN	12	
MON	13	
TUE	14	
WED	15	
THU	16	
FRI	17	
SAT	18	
SUN	19	
MON	20	
TUE	21	
WED	22	
THU	23	
FRI	24	
SAT	25	
SUN	26	
MON	27	
TUE	28	
WED	29	
THU	30	
APRIL 2026		

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MAY 2026		
FRI	1	
SAT	2	
SUN	3	
MON	4	MAY BANK HOLIDAY
TUE	5	
WED	6	
THU	7	
FRI	8	
SAT	9	
SUN	10	
MON	11	
TUE	12	6.00 ANNUAL COUNCIL (VENUE TO BE DETERMINED)
WED	13	
THU	14	6.30 ADJOURNED ANNUAL COUNCIL (B)
FRI	15	
SAT	16	
SUN	17	
MON	18	
TUE	19	
WED	20	5.00 MANDATORY PLANNING COMMITTEE TRAINING SESSION (B)
THU	21	10.00 CABINET (B)
FRI	22	
SAT	23	
SUN	24	
MON	25	SPRING BANK HOLIDAY SCHOOL HALF-TERM HOLIDAY WEEK
TUE	26	
WED	27	
THU	28	
FRI	29	
SAT	30	
SUN	31	
MAY 2026		

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Report Title **Council Tax Reduction Scheme & Council Tax Base 2025/26**

Date of meeting:	9 January 2025 14 January 2025 16 January 2025
Report to:	Cabinet Overview & Scrutiny (Regulatory, Compliance & Corporate Services) Council
Report of:	Executive Director of Corporate Resources and Commercial
Portfolio:	Corporate Services
Wards affected:	All
Included in Forward Plan:	Yes
Is this a key decision:	Yes
Exempt/confidential report:	No

Summary:

The purpose of this report is to provide details of the review of the local Council Tax Reduction Scheme for the current year 2024/25. Following the review, it is proposed that there is no change made to the scheme for 2025/26.

The report also provides an updated Council Tax Base for Sefton Council and each Parish area for 2025/26.

Recommendation(s):

Cabinet

1. Notes the outcome of the review of the Council Tax Reduction Scheme for the current year 2024/25.
2. Recommend that Council approve the current scheme for 2025/26.
3. Recommend that Council approves the relevant Council Tax Base for Sefton Council and each Parish Area for 2025/26 as set out in Annex A.

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Overview & Scrutiny Committee

That the report is noted.

Council

1. Note the outcome of the review of the Council Tax Reduction Scheme for the current year 2024/25.
2. Approve the current scheme for 2025/26.
3. Approve the relevant Council Tax Base for Sefton Council and each Parish Area for 2025/26 as set out in Annex A of the report.

1. The Rationale and Evidence for the Recommendations

Local Council Tax Reduction Scheme

1.1 Introduction/Background

- 1.2 Local Council Tax Reduction replaced Council Tax Benefit (CTB) from 1st April 2013. The Council Tax Reduction Scheme is a discount awarded to households on a low income to help towards Council Tax payments. The amount awarded is based on a person's household and income. The local scheme rules only apply to working-age Council Taxpayers. Pensioners are protected by legislation and must be provided with the level of Council Tax support specified by the Government.
- 1.3 The grant transferred to the Council, Police and Crime Commissioner and Fire Authority in 2013/14 to fund the local scheme was £24.2M; this was £3M lower than had previously been provided to fund CTB in 2012/13. The Council therefore had to introduce changes to the national default Council Tax Support Scheme to ensure that the local scheme was cost neutral. As the Government had specified the level of support that had to be provided to pensioners, the saving requirement had to be met by reducing the level of support available to working age claimants and through changes to Council Tax empty property discounts.
- 1.4 The Council is required, by law, to review the Scheme each year irrespective of whether it is being amended. The Council Tax Reduction Scheme for 2025/26 must be agreed by Council by 11th March 2025.

2. Review of the Council Tax Reduction Scheme for 2024/25

- 2.1 To satisfy the requirement to review the Scheme, the following areas have been evaluated:
 - Claimant caseload
 - Scheme expenditure
 - Impact on most vulnerable claimants
 - Council Tax collection, including Attachment of Benefits
 - Review of the Council's principles for the Scheme
 - Council Tax Exceptional Hardship Fund.

2.2 Claimant Caseload

The table below shows the caseload data at 30th September 2024 compared to caseload data at the end of each year since the Council Tax Reduction Scheme was introduced in 2013/14:

Year	Date	Pensioners	Working Age	Total	Change
2013/14	03.04.14	14,655	16,025	30,680	n/a
2014/15	01.04.15	13,925	15,349	29,274	-1,406
2015/16	31.03.16	13,206	14,886	28,092	-1,182
2016/17	31.03.17	12,541	14,524	27,065	-1,027
2017/18	31.03.18	11,970	14,005	25,975	-1,090
2018/19	31.03.19	11,404	14,160	25,564	-411
2019/20	31.03.20	10,871	14,326	25,197	-367
2020/21	31.03.21	10,491	15,519	26,010	+813
2021/22	31.03.22	10,243	14,917	25,160	-850
2022/23	31.03.23	10,053	14,712	24,765	-395
2023/24	31.03.24	9,874	14,456	24,330	-435
2024/25	30.09.24	9,853	14,249	24,102	-228

The working age caseload can be split further:

Year	Date	Employed	Other	Total	Change
2013/14	03.04.14	2,874	13,151	16,025	n/a
2014/15	01.04.15	2,748	12,601	15,349	-676
2015/16	31.03.16	2,504	12,382	14,886	-463
2016/17	31.03.17	2,193	12,331	14,524	-362
2017/18	31.03.18	1,900	12,105	14,005	-519
2018/19	31.03.19	1,597	12,563	14,160	+155
2019/20	31.03.20	1,268	13,058	14,326	+166
2020/21	31.03.21	1,070	14,449	15,519	+1,193
2021/22	31.03.22	1,126	13,791	14,917	-602
2022/23	31.03.23	1,081	13,631	14,712	-205
2023/24	31.03.24	1,039	13,417	14,456	-256
2024/25	30.09.24	971	13,278	14,249	-207

2.3 Pensioner Claimants: Since the initial implementation of the scheme in 2013/14 the number of Pensioner Claimants has declined in every year. Pensioner claimant numbers have continued to fall in 2024/25, however, the rate of decline has slowed.

2.4 Working Age Claimants: Claimant numbers increased significantly in 2020/21 as a result of the economic impact of Covid-19. Claimant numbers have reduced each year since 2021/22. However, the current economic climate is uncertain, and we could see this trend reverse.

2.5 Scheme Expenditure

The following table shows the Council Tax Reduction Scheme Expenditure reported in the Revenue Outturn Return compared to the mid-year estimate for 2024/25:

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Year	Source	Pensioners £000	Working £000	Total £000	Change £000
2013/14	RO Return	13,305	9,907	23,212	n/a
2014/15	RO Return	12,152	10,364	22,516	-696
2015/16	RO Return	11,895	9,760	21,655	-861
2016/17	RO Return	11,540	10,559	22,099	+444
2017/18	RO Return	11,378	10,948	22,326	+227
2018/19	RO Return	11,695	11,069	22,764	+438
2019/20	RO Return	11,790	11,784	23,574	+810
2020/21	RO Return	11,898	13,414	25,312	+1,738
2021/22	RO Return	12,020	13,823	25,843	+531
2022/23	RO Return	12,037	13,585	25,622	-221
2023/24	RO Return	12,468	14,254	26,722	+1,100
2024/25	Estimate	12,962	14,673	27,635	+913

Note: The forecast increase in the cost of the scheme in 2024/25 of £0.913m (3.4%) is largely due to an average council tax increase of 4.87% being offset by a reduction in claimants.

2.6 Council Tax Collection

The table below shows the amount of Council Tax billed and collected during 2023/24. At national level, it should be noted that Council Tax collection in Sefton was 1.3% above the average for Metropolitan authorities, with Sefton also being the strongest performer in the Liverpool City Region for in-year collection.

Recorded at 31 March 2024	Liability Raised £000	Received In Year £000	Collection Rate %
CTRS Cases - Working Age	4,405	3,106	70.5
CTRS Cases - Pensioner Age	1,436	1,707	118.9
Other Council Tax Payers	190,762	181,674	95.2
Total (in-year collection)	196,603	186,487	94.9

Current Year Council Tax Collection: 2024/25

As at 31st October 2024, the in-year Council Tax collection figure was 62.39% compared to 62.24% in 2023/24. Collection compares favourably to the same point in 2023/24, particularly as the Council is part way through a Single Occupier Discount Review that has increased the net collectible debit for the year by around £317,000.

2.7 Impact on the most vulnerable claimants

The local Council Tax Reduction Scheme continues to address the Council's priorities to minimise the impact on the most vulnerable, by seeking to strike a balance between dealing with Council priorities whilst supporting those experiencing financial challenges. The Council, having recognised the impact on communities, has introduced a range of mitigating actions,

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- Provision of an Exceptional Hardship Fund (see Section 2.10 below)
- Easing the transition for households claiming Universal Credit by treating notifications received from the Department for Work and Pensions (DWP), as a claim for local Council Tax Reduction, thus removing the need for those in receipt of Universal Credit to have to make a separate claim for support towards their Council Tax.
- Continuing to disregard the whole of a war pension as part of the Council Tax Reduction Scheme, including War Disablement Pensions, War Widows Pensions, and any corresponding pensions payable to a widower or surviving civil partner. For those claimants also in receipt of Housing Benefit, the Council also fully disregards War Disablement Pension and War Widow's Pension; with the cost of the first £10 disregard met by the Government as part of the Housing Benefit subsidy claim and the remainder of costs covered by the Council.
- Offering 12-month (rather than 10-month) instalment payments to Council Tax payers and taking a sensitive approach to enforcement action to consider the potential vulnerability of Council Tax Reduction claimants. Before cases are referred to Enforcement Agents a vetting stage has been introduced and cases are dealt with under a separate debt recovery process to minimise potential increases in debt.
- In response to the cost-of-living crisis, the procedures for negotiating payments have been reviewed and updated to include feedback from Sefton Citizen's Advice. In addition, there is a co-ordinated working relationship between the Council's contracted Enforcement Agents and Citizens Advice to support people in debt. Citizens Advice Sefton has direct lines of communication with the Enforcement Agents and can arrange for recovery action to be placed on hold whilst discussing and agreeing affordable payment arrangements.
- The Council is taking a sensitive approach with Council Tax collection for households in the Southport area who may have been affected by the tragic incident in July with a hold being placed on recovery action.
- Council Tax support has been provided to households in Bootle that were affected by flooding at the end of September 2024. A discretionary award has been made through the Exceptional Hardship Fund to cover Council Tax payments.
- The Debt Respite Scheme (known as Breathing Space), which started in May 2021, gives a person with debt problems the right to legal protections from recovery activity. Standard breathing space lasts for 60-days and can be extended if the person is receiving mental health crisis treatment. This enables a debt advice provider time to arrange an appropriate debt solution. During the period 1st November 2023 – 31st October 2024, the Council has received notification of 205 customers in Breathing Space of which 180 have now expired. Over 95% of these applications were in respect of Council Tax debt only.

2.8 **Attachment of Benefits**

Since the introduction of the Council Tax Reduction Scheme in April 2013 the number of working age claimants falling into arrears continues to grow. One recovery option open to the Council for benefit claimants is to apply for an Attachment of Benefit (AOB) via the courts. Under this option, the following deductions from benefits may be applied:-

- For claimants of Job Seeker's Allowance/Income Support/Employment Support Allowance/Pension Credit the weekly deduction is £4.55.

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- For single claimants under 25 on Universal Credit, the deduction is £15.58 per 4 weeks, rising to £19.67 per 4 weeks for those aged over 25.
- For couples over 25 on Universal Credit, the deduction is £30.88 per 4 weeks.
- An AOB cannot be applied without first having taken the debtor to court to obtain a Liability Order. Due to the need to follow the correct legislative timeline for obtaining a Liability Order, payment by AOB cannot commence until part-way through the year. Typically for a bill issued in March the first payments would not be made by the DWP until August of the same year.
- A significant number of people have arrears for more than one financial year. As only one AOB order may be deducted at a time there has been a significant increase in the number of pending cases. These cases are effectively stacked up until an earlier order is paid. No recovery action may be taken in the interim and the value of such cases is increasing year on year.
- Many new claimants for local Council Tax Reduction have already accrued debts before an AOB can be considered.

The following table shows the amount of debt being recovered by AOB, and the amount of debt still waiting recovery by AOB as at 31st October 2024:-

	31.10.21	31.10.22	31.10.23	31.10.24
AOB in payment	£1,170,127	£1,719,777	£2,012,354	£2,238,654
Number of cases	5,002	7,524	7,715	8,089
AOB Pending	£4,868,797	£5,897,664	£7,441,760	£8,624,268
Number of cases	17,101	20,008	22,649	24,693

2.9 Review of Scheme Principles

The local Council Tax Reduction Scheme is based on five principles and the review is summarised below:

Principle	CTRS working for non-pensioner claimants?
The Council will continue to support work incentives	Yes – The Council continues to operate a system which disregards certain amounts of money from customers earnings through employment and self-employment when calculating entitlement, and to support those working households making the transition from legacy state-benefits to Universal Credit.
The Council will continue to	Yes – The Council continues to make additional

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<p>recognise the additional needs of our most vulnerable residents.</p>	<p>allowances and give additional support to those receiving certain DWP sickness benefits, disability benefits and benefits for Carers when calculating entitlement.</p> <p>Additionally, the Council continues to disregard certain disability benefits as income when calculating entitlement</p> <p>Procedures are regularly reviewed for the collection of non- payment of Council Tax to ensure non-disproportionate impact on the most vulnerable households. Also budgeting support and advice is made available to all claimants.</p> <p>The Council Tax Exceptional Hardship Fund is available to those in the greatest financial need with fair and transparent criteria for awards.</p>
<p>The Council will continue to recognise the additional needs of families with children</p>	<p>Yes – Child Benefit and Child Maintenance payments are not considered as income when calculating entitlement to CTRS.</p> <p>Additional allowances are given when calculating entitlement for where there is a disabled child in the family.</p> <p>The CTRS takes childcare costs into account for low income working families.</p> <p>The Council continues to include the Family Premium when calculating the Council Tax Reduction. This has been removed for all new Housing Benefit claims from 2016. The Council has also chosen not to mirror the Housing Benefit scheme which restricts the amount of support given to families with more than two children within its CTRS.</p>
<p>The Council supports households staying together to make better use of housing in Sefton and reduce homelessness.</p>	<p>Yes - The amount of Council Tax Reduction taken away from a customer when other adults live in the household (known as a non-dependant deduction), was reduced in 2013 and remains at those lower levels.</p>
<p>The Council will continue to have due regard to the Armed Forces Covenant</p>	<p>Yes – War Disablement and War Widows pensions in calculating CTRS, including any Armed Forces compensation in accordance with the covenant is disregarded. This also includes the service attributable element of the armed forces pension could also be disregarded as income when calculating entitlement.</p>

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The EHF fund is administrated within an agreed policy, the Discretionary Reduction in liability policy, approved by Cabinet Member for Regulatory, Compliance and Corporate Services.

The EHF aims to help vulnerable working age people experiencing financial hardship by reducing their Council Tax bill.

The total fund for 2024/25 is £277,034, this includes the £170,000 annual EHF and agreed carry over from 2023/24. As at 1st November 2024, £184,684 EHF has been awarded, leaving £92,349 available for the remainder of the year.

Each year, EHF of approximately £33,000 is used to fund Council Tax discounts for care leavers. The Council provide up to a 100% discount of Council Tax to care leavers aged 18 or over, up to the date of their 25th birthday, who live in Sefton and who are looked after by the Council.

3. Council Tax Base 2025/26

In accordance with Local Authorities (Calculation of Council Tax Base) (England) Regulations 2012, as amended, the Council is required to set a tax base for both Sefton Council and for each Parish Area for 2025/25 before 31st January 2025.

The proposed council tax base for Sefton Council and the Parish Areas is set out in Annex A of this report.

4. Financial Implications

Council Tax Reduction Scheme

There would be no additional revenue implications as a result of a decision to retain the current scheme, with the cost of the current Scheme discounts are reflected in the draft council tax base set out in Annex A of this report.

Council Tax Exceptional Hardship Fund

This report contains no proposals to change Council Tax Exceptional Hardship Fund budget for 2025/26 so there are no financial implications. However, it should be noted that as the amount of reserves available to carry forward has reduced in 2024/25 there will be less funding available in 2025/26 to meet the cost of EHF awards.

Council Tax Base

Changes to the council tax base will have an impact on the level of Council Tax income transferred from the Collection Fund to the Council's General Fund in 2025/26. It will also impact on the amounts due to the Police and Crime Commissioner, the Fire and Rescue Service, and the Combined Authority.

The following table shows the estimated increase in council tax income as a result of changes to the tax base between 2024/25 and 2025/26, based on the 2024/25 Council Tax Band D charge:

Council Tax Income	Sefton Council £ million	Police & Crime £ million	Fire & Rescue £ million	Combined Authority £ million
Draft Tax Base	1.769	0.241	0.083	0.017

5. Legal Implications

Local Council Tax Reduction Scheme

By Section 5 of Schedule 1A of the Local Government Finance Act 1992 (as amended by the Local Government Finance Act 2012) for each financial year each billing authority must:

- (1) Consider whether to revise its Council Tax Reduction Scheme or to replace it with another scheme.
- (2) Make any revision to its scheme, or any replacement scheme, no later than 11 March in the financial year preceding that for which the revision or replacement is to have effect.
- (3) If any revision to a scheme, or any replacement scheme, has the effect of reducing or removing a reduction to which any class of person is entitled, the revision or replacement must include such transitional provision relating to that reduction or removal as the authority thinks fit.
- (4) Before revising its scheme or making a replacement scheme, an authority must:
 - i. Consult any major precepting authority which has power to issue a precept to it.
 - ii. Publish a draft scheme in such manner as it thinks fit, and
 - iii. Consult other such persons as it considers are likely to have an interest in the operation of the scheme.

6. Corporate Risk Implications

The Council's Internal Audit team have carried out two reviews relevant to this report: a review of Housing Benefit / Council Tax Reduction Scheme administration (June 2023) and also a review of Council Tax collection / debt management (July 2024). The aim of both reviews was to provide senior managers in Corporate Resources with assurance that risks are being appropriately managed and mitigated. In both cases, the risk was determined as being minor.

7. Staffing HR Implications

The local Council Tax Reduction Scheme will continue to be administered from existing resources.

8. Conclusion

As a result of the review undertaken, it is proposed that the Council's local Council Tax Reduction Scheme for 2025/26 will remain unchanged to help maintain consistency and stability for those using it. The Scheme continues to address the Council's focus to minimise the impact on the most vulnerable households by striking a balance between collecting Council Tax whilst supporting those experiencing financial challenges.

The council tax base set out in Annex A has increased compared to 2024/25 which will assist in closing the budget gap faced by the Council in 2025/26.

Alternative Options Considered and Rejected

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None, as following review, the scheme continues to address the Council's priorities to minimise the impact on the most vulnerable, by seeking to strike a balance between dealing with Council priorities whilst supporting those experiencing financial challenges.

Equality Implications:

Department for Communities and Local Government issued a report in February 2014 reminding local authorities of their key duties when deciding on local Council Tax Reduction Schemes:

- Public Sector Equality Duty (The Equality Act 2010)
- Duty to mitigate the effects of child poverty (The Child Poverty Act 2010)
- The Armed Forces Covenant
- Duty to prevent Homelessness (The Housing Act 1996)

An equality impact assessment has been undertaken as part of the review of the Council Tax Reduction Scheme and is available at Annex B. The assessment found that there are no disproportionate impacts; mitigating actions remain effective and valid continuing to support working families and vulnerable residents as follows:-

- The Council continues to provide a discretionary Exceptional Hardship Fund to assist financially vulnerable working age households and families as described in paragraph 2.10 above.
- Procedures and processes for collection of non-payment of Council Tax as set out at paragraph 2.7 above help to ensure that there is no disproportionate impact on the most vulnerable households.
- The Council continues to support the five principles set out for the Scheme as can be seen at the table at paragraph 2.9 above.
- Legislation remains in place to protect low-income pensioners from any reduction in support brought about by the introduction of the local Council Tax Reduction Scheme.

Impact on Children and Young People:

One of the Council's key principles for the Scheme is to recognise the additional needs of families with children. A summary of support provided by the Scheme is set out at in the table at 2.9 above.

In addition, the Council's Exceptional Hardship Fund provides Council Tax support to young people leaving care provided by Sefton Council as set out at 2.10 above.

Climate Emergency Implications:

The recommendations within this report will have a Neutral impact.

What consultations have taken place on the proposals and when?

(A) Internal Consultations

The Executive Director of Corporate Resources and Commercial (FD.7885/24) and the Chief Legal and Democratic Officer (LD.5985/24) have been consulted and any comments have been incorporated into the report.

(B) External Consultations

Details of the review of the local Council Tax Reduction Scheme, the proposed scheme for 2025/26 and the Council Tax Base are provided to the precepting bodies, i.e., the Police and Crime Commissioner, Merseyside Fire and Rescue Service and the Liverpool City Region Combined Authority.

Implementation Date for the Decision:

Following the expiry of the “call-in” period for the Minutes of the Cabinet recommendation to Council and approval by Council on 16th January 2025.

Contact Officer:	Diane Turner
Telephone Number:	0151 934 3481 / MS Teams
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Appendices:

Annex A: Council Tax Base Report 2025/26

Annex B: Equality Impact Assessment: Council Tax Reduction Scheme

Background Papers: Not applicable.

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SETTING THE COUNCIL TAX BASE FOR 2025/26

1. Setting the Council Tax Base

- 1.1 The council tax base is the link between the Council's budget and the level of council tax. The tax base will be used to calculate the council tax in Sefton, once the Council's budget has been agreed. The Council is required to calculate its own tax base as well as the tax base for each parish council within its boundary and have them approved by the 31 January 2025.
- 1.2 The calculation of the council tax base takes into account many factors such as the rate of new building and the trends in people living on their own (Sole Occupier Discounts) as well as forecast long-term collection rates.

2. Council Tax Base for Sefton Council in 2025/26

- 2.1 An analysis of the changes between the 2024/25 and the 2025/26 tax base is provided in the table below:

Tax Base for Sefton Council		Band D Equivalents		
		2024/25	2025/26	Change
H	<u>Chargeable Dwellings</u>			
	Dwellings on the Banding List	113,369.8	114,056.0	686.2
	Exempt Dwellings	-2,426.9	-2,778.6	-351.7
	Disabled Persons Reductions	-159.7	-160.4	-0.7
		110,783.2	111,117.0	333.8
Q	Discounts	-10,593.4	-10,521.9	71.5
E1	Empty Homes Premium	1,356.8	1,142.8	-214.0
E2	Second Homes Premium	0.0	368.9	368.9
J	Adjustments	-631.9	-337.3	294.6
Z	Council Tax Support Scheme	-12,019.2	-11,847.0	172.2
B	Collection Rate Adjustment	-2,444.6	-2,562.8	-118.2
	MOD Properties	8.0	8.0	0.0
Council Tax Base		86,458.9	87,367.7	908.8

- 2.2 The main reasons for the changes in the tax base are:

Dwellings on the Banding List: The number of properties on the Banding List has increased by 738 (+0.6%) in the year.

Exempt Dwellings (A-W): The number of dwellings subject to an exemption increased by 409 (14.2%). The largest increases were in the number of Class B exemptions (owned by a charity), Class N exemptions (Student Households), and Class U exemptions (Severely Mentally Impaired).

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Sole Occupier & Status Discounts: The number of dwellings receiving a 25% discount due to single occupancy has decreased by 825 (-1.7%). However, this has been offset by an increase in the number of dwellings receiving status discounts and Class C empty property discounts.

Empty Homes Premium: The number of dwellings left empty for more than one year has reduced by 259 (-18.7%).

Second Homes Premium: This is a new premium applied from 1 April 2025.

Adjustments: The taxbase forecast assumes a higher level of housing growth over the next year. The adjustments have also reduced as a result of removing the banding list reductions / prior year adjustments forecast in 2025/26, the collection rate adjustment has been increased to compensate for this.

Council Tax Support Scheme (CTRS): The number of both pension and working age claimants has reduced over the last 12 months.

Collection Rate Adjustment (CRA): The provision for non-collection has been reduced from -2.75% to -2.50%, however, a new adjustment for changes to prior year net charges of -0.35% has been added in 2025/26 which has changed the total CRA by -0.1% from -2.75% to -2.85%. The prior year adjustment was previously included in Item J (Adjustments).

3. Council Tax Base in Parish Areas for 2025/26

3.1 There are also new tax base figures for each parish area in 2025/26. The following tables provide details of the proposed new tax base for each parish compared to 2024/25:

Tax Base for Parish Areas	Band D Equivalents			%
	2024/25	2024/25	Change	Change
Parish of Aintree Village	2,079.9	2,089.3	9.4	0.5%
Parish of Formby	9,222.3	9,277.5	55.2	0.6%
Parish of Hightown	874.0	870.0	-4.0	-0.5%
Parish of Ince Blundell	174.0	171.7	-2.3	-1.3%
Parish of Little Altcar	450.5	480.5	30.0	6.7%
Parish of Lydiate	2,110.2	2,137.0	26.8	1.3%
Parish of Maghull	6,920.9	7,066.5	145.6	2.1%
Parish of Melling	1,118.2	1,129.6	11.4	1.0%
Parish of Sefton	327.6	335.7	8.1	2.5%
Parish of Thornton	772.5	800.4	27.9	3.6%

3.2 The tax base calculation for each of the parish areas is based on the same assumptions made in the calculation for Sefton Metropolitan Borough Council.

3.3 The reductions in Hightown and Ince Blundell Parish Areas are largely due to an increase in exemptions in those areas.

4. **New Second Homes Premium and Premium Exceptions introduced in 2025/26**

- 4.1 At its meeting on 18 January 2024, the Council approved the introduction of a 100% council tax premium on dwellings occupied periodically (the Second Homes Premium) from 1 April 2025. The impact of this new premium has been built into the tax base forecasts presented in this report.
- 4.2 Some second homeowners are expected to take action to avoid the premium when it applies, and an adjustment has been made in Item J of the taxbase calculation to take account of this. However, as this is the first year that the second homes premium will apply there is significant uncertainty over the level of avoidance that might occur in 2025/26.
- 4.3 In October 2024, the Government made new regulations that introduced a number of new exceptions that will apply to either or both the long-term empty homes and second homes premiums. The exceptions which come into force from 1 April 2025 are listed in the table below:

<u>Class</u>	<u>Exception</u>	<u>Applies to</u>
G	Dwellings being actively marketed for sale	Both
H	Dwellings being actively marketed for let	Both
I	Dwellings which have fallen in Class F of the Exempt Dwellings Order and have undergone probate.	Both
J	Dwellings which are periodically occupied in certain job-related circumstances.	Second Homes
K	A pitch occupied by a caravan, or a mooring occupied by a boat	Second Homes
L	Dwellings where a planning condition prevents permanent occupancy.	Second Homes
M	Vacant dwelling which requires or is undergoing major repair work to make it habitable, or structural alterations.	Empty Homes

Exceptions G, H and I will apply for a maximum of 12 months. These exceptions are intended to allow council taxpayers time to sell or let their properties without having to pay the premium. Exceptions J, K, L, and M are not time limited.

- 4.4 An adjustment has been made in Item J of the taxbase calculation to take account of the potential impact of the new exceptions. However, as this is the first year that the exceptions will apply there is significant uncertainty over the level of premium income that might be lost in 2025/26.
- 4.5 The parish area tax base forecasts have also been adjusted to take account of the impact of the premium exceptions.
- 4.6 The application of the premium exceptions is expected to make future council tax income more volatile and therefore more difficult to forecast. The Cabinet and Council are provided with regular monthly updates of council tax income forecasts during the year. Any significant variation from the tax base forecast presented in section 2.1 above will be reported during 2025/26.

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Annex B

Equality Impact Assessment – Council Tax Reduction Scheme 2025/26

Details of proposal: Council Tax Reduction Scheme – No change to Council Tax Reduction Scheme for 2025/26

It is proposed that there will be no changes made to the Council Tax Reduction (CTR) scheme for 2025/26. The scheme provides support to around 24,000 households who are on a low income with Council Tax payments.

There are around 14,200 households of working age, with the remainder of pension age.

The current scheme is a means tested discount; pension age recipients are protected from any reduction in support under a scheme that is set out in national regulations.

Ramifications of Proposal:

Summary of Council Tax Support available to assist Council Taxpayers who are in receipt of a low income for 2025/26

Sefton Council's local Council Tax Reduction Scheme is based on five principles: -

1. The Council will continue to support work incentives
2. The Council will continue to recognise the additional needs of our most vulnerable residents.
3. The Council will continue to recognise the additional needs of families with children
4. The Council supports households staying together to make better use of housing in Sefton and reduce homelessness
5. The Council will continue to have due regard to the Armed Forces Covenant

Are there any protected characteristics that will be disproportionately affected in comparison to others?

The protected characteristics under the Equality Act 2010 are:

Age (working age)

The Council's local Council Tax Reduction scheme affects working age people and has a financial impact on households who already have a low income.

Age (Pensionable age)

People over pensionable age are supported with Council Tax Reduction, but this is via the national prescribed scheme and local authorities are not permitted to change this.

People with a Disability

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In Sefton, around 53% of pensioners receiving Council Tax Reduction have a disability income, and 41% of working aged people receiving Council Tax Reduction have a disability income.

The Council recognises that additional expenses may be incurred relating to disability and has put the following mitigations in place: -

- Continuing to make additional allowances and give additional support to those receiving certain DWP sickness benefits, disability benefits and benefits for Carers when calculating entitlement.
- Disregarding certain disability benefits as income when calculating entitlement.
- Providing signposting and support to people to claim other reductions of Council Tax liability where appropriate, e.g., discount in respect of severe mental impairment, disabled banding reductions

Gender Reassignment

No impacts identified specific to this equality group.

Marriage and Civil Partnership

No impacts identified specific to this equality group.

Race

No impacts identified specific to this equality group. Calculation of entitlement to Council Tax Reduction does not refer to race and is not impacted by it.

Religion or Belief

No impacts identified specific to this equality group.

Sex

Women are generally more likely to be single parents in the first place (84%) according to ONS 2021.

No impacts identified specific to this equality group.

Sexual Orientation

No impacts identified specific to this equality group.

Pregnancy and Maternity

We do not have sufficient evidence, but females are disproportionately affected and are more likely to be single parents.

Mitigation in place to support the additional needs of households with children includes:

- Deciding that the Council's local Council Tax Reduction scheme for working-age

families should not replicate the rules that are in place in the national Housing Benefit scheme and the Council Tax Reduction Pensioner scheme whereby the removal of the family premium and the “2-child” rule restrict the level of award.

- Child Benefit and Child Maintenance payments are not taken into account as income when calculating entitlement to Council Tax Reduction.
- Additional allowances are given when calculating entitlement for where there is a disabled child in the family.
- The scheme also mirrors provisions in the Housing Benefit scheme by taking childcare costs into account for low income working families.
- The Council continue to include the Family Premium when calculating the Council Tax reduction.
- Procedures are regularly reviewed for the collection of non-payments of Council Tax and signposting to Exception Hardship Fund to ensure non-disproportionate impact on the most vulnerable household.

No further impacts identified specific to this equality group.

Mitigations in place to support the Council’s principles of the scheme

Financially Vulnerable People:

The Council has put the following mitigation in place: -

- Provision of a discretionary Exceptional Hardship Fund to provide additional support to those financially vulnerable to struggling to pay Council Tax
- For working aged people, allowing a Universal Credit notification, received from the Department for Work and Pensions (DWP), to be treated as a claim for local Council Tax Reduction thus removing the need for those in receipt of Universal Credit to have to make a separate claim for support towards their Council Tax.
- Making provision in the local Council Tax Reduction Scheme for awards to be backdated for up to 6-months for working-age vulnerable claimants.
- Offering 12-month (rather than 10-month) instalment payments to Council Tax payers to help ease payment difficulties.
- Adopting a sensitive approach to enforcement action to consider the potential vulnerability of Council Tax Reduction claimants. Before cases are referred to Enforcement Agents a vetting stage is in place and cases are dealt with under a separate debt recovery process to minimise potential increases in debt.
- Establishing a co-ordinated working relationship between the Council’s contracted Enforcement Agents and Citizens Advice Sefton to support people in debt, ensuring that Citizens Advice Sefton has direct lines of communication with the Enforcement Agents and can arrange for recovery action to be placed on hold whilst discussing and agreeing affordable payment arrangements.
- Putting an escalation process in place for the debt advisor based at South Sefton foodbank to contact nominated Council Tax staff to request a hold on recovery action or discuss affordable payment arrangements.
- Participating with Council anti-poverty initiatives, e.g. staff from the Council’s Council Tax and Benefit team work with partner organisations and other Council services to support residents suffering financial vulnerability, this includes signposting customers to emergency support for food, heating, essential household goods and provide practical support such as signposting claimants for winter coats, school uniforms.
- The Council attends various customer representative events and hard to reach groups to raise awareness of Council Tax support available, i.e., Pensioner and Disability forums, Sefton Citizens Advice surgeries.

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Care Leavers

The Council provides up to 100% Council Tax discount to support to young people leaving local authority care up to the date of their 25th birthday.

Armed Forces Covenant

The Council has identified that there are less than 100 households in Sefton claiming support from Council Tax Reduction and/or Housing Benefit and in receipt of War Disablement, War Widows pension including any Armed Forces compensation. The Council fully disregards this income when calculating entitlement. Also disregarded is the service attributable element of the armed forces pension.

Supporting Households to Stay Together, Making Better Use of Housing and Reducing Homelessness

- The Council has decided that the amount of Council Tax Reduction taken away from a customer's entitlement when other adults live in the household (known as a non-dependant deduction), should remain at a reduced level.
- The Council uses the powers available to it to charge a premium on long-term empty properties to encourage owners to bring them back into use. The premium cannot be applied homes that are empty due to the occupant living in armed forces accommodation for job-related purposes. Also, the Council Tax system makes provision for statutory exemptions for properties left empty for a specific purpose, e.g. when a person goes into care.

Consultation:

There has been no public consultation exercise as there are no changes proposed for the Council Tax Reduction scheme for 2025-26.

Is there evidence that the Public Sector Equality Duties will be met?

The Equality Act 2010 requires that those subject to the Equality Duty must, in the exercise of their functions, have due regard to the need to:

- 1. Eliminate unlawful discrimination, harassment and victimisation and other conduct prohibited by the Act.*
- 2. Advance equality of opportunity between people who share a protected characteristic and those who do not.*
- 3. Foster good relations between people who share a protected characteristic and those who do not.*

The Act explains that having due regard for advancing equality involves:

- *Removing or minimising disadvantages suffered by people due to their protected characteristics.*
- *Taking steps to meet the needs of people from protected groups where these are different from the needs of other people.*
- *Encouraging people from protected groups to participate in public life or in other*

activities where their participation is disproportionately low.

The Council has set out in the sections above how it meets its equalities duties in relation to the local Council Tax Reduction Scheme.

What actions would follow if proposal accepted by Cabinet and Council?

No changes to the Council Tax Reduction scheme for 2025-26.

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Cabinet Report



Corporate Performance Report Q1 and Q2 2024/25

Date of meeting:	9 th January 2025		
Report to:	Cabinet		
Report of:	Executive Director – Corporate Services and Commercial		
Portfolio:	Corporate Services		
Wards affected:	All		
Is this a key decision:	No	Included in Forward Plan:	Yes
Exempt/confidential report:	No		

Summary:

On the 25th of July 2024 Cabinet agreed the Sefton Corporate Plan (2024 to 2027), with revised corporate objectives to deliver the Council’s agreed strategic priorities.

Cabinet also agreed an updated Service Planning and Performance Management framework, aligned to the refresh of the Sefton Corporate Plan (2024 to 2027), for embedding the service level improvements in performance management, and to inform regular, collective, and cross-cutting performance discussions at Cabinet.

This report presents the first Corporate Performance Report (Annexe A) for Q1 and Q2 of 2024/25 that will be presented to Cabinet quarterly and which demonstrates performance against the commitments agreed in the Sefton Corporate Plan (2024 to 2027).

Recommendation(s): Cabinet are recommended to

- (1) Receive and consider the corporate performance report for Q1 and Q of 2024/25, against the Sefton Corporate Plan (2024 to 2027)

1. The Rationale and Evidence for the Recommendations

1.1 The Corporate Plan sets out the Council’s strategic priorities for the short to medium term, aligned to the medium term financial planning process. It describes where overall the Council is headed (Council priorities) and outlines a roadmap to get there (corporate objectives).

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- 1.2 During 2016 Sefton Council led on developing a new and exciting vision for the future of the borough. Working closely with partners, businesses, private sector organisations, the voluntary, community and faith sector and the wider Sefton community, the aim behind the work was to understand and focus on what is important for the borough and its communities in the future. Imagine Sefton 2030 engaged with thousands of people, local businesses and potential investors to create a vision that collectively promotes shared prosperity, coordinated public investment, and a healthy environment and population. Vision 2030 was agreed in November 2016, and guides the Council's long term planning - helping to stimulate growth, prosperity, set new expectation levels and to help focus on what is important for Sefton, its residents and communities. The Vision 2030 informed the Council priorities and its corporate objectives to deliver those priorities, for the short to medium term, which were set out in its original Corporate Plan (2023-26).
- 1.3 The revitalised Corporate Plan (2024 to 2027) refines the priorities and reflects the ambition for the Council and for the borough. It is designed to ensure the Council is fit for the challenges and opportunities of the future, and can evidence how it has and will deliver for its communities. It will ensure that the Council delivers on its ambition for Sefton to be a confident, thriving and connected borough that offers the things we all need to start, live and age well, where everyone has a positive and healthier future:
- 1) Children & Young People - Delivering improved children's services so that Sefton is an inclusive child-friendly borough where children and families thrive.
 - 2) Adult Social Care - Delivering improved adult social care so that people are empowered to live an independent life, exercise choice and control, and be fully informed.
 - 3) Health & Wellbeing - Delivering improved health and wellbeing for everyone in Sefton and reduce inequality.
 - 4) Working for Our Communities Every Day - Delivering on the services that matter to residents, working together to deliver affordable services which achieve the best possible outcomes for our communities.
 - 5) Inclusive Growth - Delivering on our ambition for a prosperous Sefton, to enhance Sefton's offer as a place to live, learn, earn and visit.
 - 6) Financial Sustainability – driven by medium term financial planning that provides the strategy, basis for annual budget setting and how the Council will spend its financial resources in support of the delivery of the Council's objectives.
- 1.4 The refreshed Corporate Plan will be used as an opportunity to ensure that underpinning strategies and plans across the organisation reflect the key priorities of the Council over the next period, and it will help to keep the Council priorities front and centre corporately, with partners, and collectively owned.
- 1.5 The Local Government Association (LGA) Corporate Peer Challenge completed in November 2023, recognised the progress that the Council has made to develop a Corporate Plan, which identified Council key priorities and corporate objectives. The Local Government Association (LGA) also recognised the progress that the Council had made to embed the service level improvements in performance management, with regular, collective and cross-cutting performance discussions at Cabinet. To support the council, it was suggested that there was further opportunity for improvement through monitoring the Corporate Plan objectives with a performance scorecard which tracks progress against the Council's key corporate priorities and ensuring that similarly routine performance information is provided to Scrutiny and all wider members. Suitable corporate monitoring and accountability will also be important for keeping on track, for supporting early and well informed remedial / corrective action and avoiding any future surprises.

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- 1.6 The Local Government Association (LGA) specifically recommended a review and refinement of the Council's performance management arrangements and to develop a performance management reporting framework, that reflects the Council vision, Council priorities and corporate objectives, with the incorporation of direction of travel and benchmarking to better understand relative performance, and the use of targets to articulate ambition and focus attention on service improvement.
- 1.7 The council has in Q1 of this year refreshed the Service Planning and Performance Management Framework for the Council, which sets out how performance management will be aligned to the service planning process throughout each layer of the organization, so that the Sefton Vision 2030, the Council's Core Purpose, the Council priorities and corporate objectives identified in our refreshed Corporate Plan are shared and transparent to our workforce, Members, key partners and our citizens in Sefton. The framework will ensure that the Council achieves what it sets out to do in its Vision, Core Purpose and Corporate Plan, with a focus on performance management rather than simply performance measurement. Reflecting on best practice, the Service Planning and Performance Management Framework:
- a) helps improve the Council's corporate approach to service planning and performance management, supporting the Council to achieve its vision and to deliver high-quality outcomes for its residents.
 - b) Defines the service planning and performance management process, including how the relevant disciplines link together to create the golden thread of strategic activity across the organisation.
 - c) Defines the roles and responsibilities within the service planning and performance management cycle.
 - d) Provides transparency and clarity for the Council's aspirations for performance management, and the interlinking elements including governance and data management.
- 1.8 A set of key performance reporting indicators (KPIs) which form the basis of the refreshed Corporate Performance Report (Annexe A), and will be used to track progress against the key corporate priorities in the Corporate Plan have also been developed.
- 1.9 The recommended timetable for reporting performance to Cabinet is set out below:

Operating/Fiscal Quarter		Reporting
Q1	April, May & June	September
Q2	July, August & September	December
Q3	October, November & December	March
Q4	January, February & March	June

- 1.10 The refreshed Corporate Performance Report set out in Annexe A provides the first report of this new approach and reflects performance for Q1 and Q2 of 2024/25, using the most recent data available at the time of reporting under the constraints of the reporting timetable. It should be noted that as a result it may not be possible for some services to report on the most recent period due to the time taken to record and validate information before reporting and where reporting is provided for the most recent period this may well be subject to change in subsequent reports due to similar timeliness of recording and processing issues.
- 1.11 The quantitative measures included in the refreshed Corporate Performance Report (Annexe A) are the first iteration of suggested indicators to be used to measure progress, however, moving forward officers will continually review and make recommendations to Cabinet to

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amend as necessary the performance measures, to ensure that the Council achieves the right balance between the macro and micro analysis. Some performance data does not lend itself to being reported quarterly, for example school performance and pupil attainment data which could typically be presented annually in September. Therefore the quarterly performance information will be supplemented with subject specific information at relevant points throughout the financial year when relevant data is available. Furthermore, future performance reporting to Cabinet will draw on the outcome of relative consultation and engagement activity to demonstrating progress and impact using both quantitative and qualitative insight.

2. Financial Implications

There are no financial implications.

3. Legal Implications

There are no legal implications.

4. Risk Implications

There are no identified risk implications at this stage of developing the corporate performance reporting process.

5 Staffing HR Implications

There are no HR implications.

6 Conclusion

The refreshed Sefton Corporate Plan 2024 to 2027 states the specific corporate objectives to deliver the Council's key strategic priorities over this next period and will be used as an opportunity to ensure that underpinning strategies and plans across the organisation also reflect the key priorities of the Council over the next period. It will help to keep the Council priorities front and centre, corporately, with partners, and collectively owned.

The Sefton Service Planning and Performance Management Framework 2024 sets out how performance management will be aligned to the service planning process throughout each layer of the organization, so that the Sefton 2030 Vision, the Council's Core Purpose, the Council priorities and corporate objectives identified in our Corporate Plan are shared and transparent to our workforce, Members, key partners and our citizens In Sefton.

The refreshed Corporate Performance Report (Annexe A) will be used to track progress against the key corporate priorities in the Corporate Plan and ensure that routine performance information is provided to Scrutiny and all wider members. Moving forward offices will continually review and make recommendations to Cabinet to amend as necessary the performance measures, to ensure that the Council achieves the right balance between the macro and micro analysis and will also draw on the outcome of relative consultation and engagement activity to demonstrating progress and impact using both quantitative and qualitative insight.

Alternative Options Considered and Rejected

None

Equality Implications:

There are no equality implications.

Impact on Children and Young People:

The refreshed Corporate Plan shows the Council’s continuing commitment to children and young people, abs the Corporate Performance Report will be used to demonstrate improving outcomes for children and their families.

Climate Emergency Implications:

The recommendations within this report will have a Neutral impact.

What consultations have taken place on the proposals and when?

(A) Internal Consultations

The Executive Director of Corporate Services & Commercial (FD.7800/24) and the Chief Legal and Democratic Officer (LD.5900/24) have been consulted and any comments have been incorporated into the report.

Furthermore, the Executive Leadership Team and the Strategic Leadership Board have been consulted on the set of key performance reporting indicators (KPIs) which form the basis of the refreshed Corporate Performance Report (Annexe A), and will be used to track progress against the key corporate priorities in the Corporate Plan.

(B) External Consultations

The refresh of the Corporate Plan draws on the previous extensive prior consultation - Imagine Sefton 2030, which engaged thousands of people, local businesses, visitors and potential investors to create the Sefton Vision 2030 that collectively promotes shared prosperity, coordinated public investment, and a healthy environment and population.

Implementation Date for the Decision :

Following the expiry of the “call-in” period for the Cabinet decision.

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Appendices:

The following appendices are attached to this report:

- (1) The refreshed Corporate Performance Report, including data for operating/fiscal quarters Q1 and Q2 2024, set out in Annexe A.

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Financial Management 2024/25 to 2027/28 - Revenue and Capital Budget Update 2024/25 – January Update

Date of meeting:	9 th January 2025
Report to:	Cabinet
Report of:	Executive Director – Corporate Services and Commercial
Portfolio:	Corporate Services
Wards affected:	All
Included in Forward Plan:	Yes
Is this a key decision:	Yes
Exempt/confidential report:	No

Summary:

To inform **Cabinet** of:

- 1) The current position relating to the 2024/25 revenue budget.
- 2) The current forecast on Council Tax and Business Rates collection for 2024/25.
- 3) The monitoring position of the Council’s capital programme to the end of November 2024:
 - The forecast expenditure to year end.
 - Variations against the approved budgets and an explanation of those variations for consideration by Members.
 - Updates to spending profiles and proposed amendments to capital budgets necessary to ensure the efficient delivery of capital projects.

Recommendation(s):

Cabinet is recommended to: -

Revenue Outturn

- 1) Note the current position relating to the 2024/25 revenue budget.
- 2) Note the actions being taken to refine forecasts and identify mitigating efficiencies to ensure each service achieves a balanced position.
- 3) Note the remedial action plan measures previously approved by Cabinet on 7th November 2024 (outlined in section 3).
- 4) Note the intention to review and release Earmarked Reserves to support the

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additional in-year budget pressure and reduce the call on the Council's General Balances.

- 5) Recognise the financial risks associated with the delivery of the 2024/25 revenue budget and acknowledge that the forecast outturn position will continue to be reviewed, and remedial actions put in place, to ensure a balanced forecast outturn position and financial sustainability can be achieved.

Capital Programme

- 6) Note the spending profiles across financial years for the approved capital programme (paragraph 8.1).
- 7) Note the latest capital expenditure position as at 30 November 2024 of £31.470m (paragraph 7.3); the latest full year forecast is £77.937m (paragraph 7.4).
- 8) Approve a supplementary capital estimate of £0.651m and a supplementary revenue estimate of £0.005m for the Local Authority Housing Fund Round 3 funded by grant from MHCLG (paragraph 7.09)
- 9) Approve a supplementary capital estimate of £0.449m for the Network North Roads Resurfacing Fund funded by grant from the Liverpool City Region Combined Authority (paragraph 7.10).
- 10) Note that capital resources will be managed by the Executive Director Corporate Service and Commercial to ensure the capital programme remains fully funded and that capital funding arrangements secure the maximum financial benefit to the Council (paragraphs 7.11-7.13).

1. The Rationale and Evidence for the Recommendations

To ensure Cabinet are informed of the current position in relation to the 2024/25 revenue budget.

To provide an updated forecast of the outturn position with regard to the collection of Council Tax and Business Rates.

To keep members informed of the progress of the Capital Programme against the profiled budget for 2024/25 and agreed allocations for future years.

To progress any changes that are required in order to maintain a relevant and accurate budget profile necessary for effective monitoring of the Capital Programme.

To approve any updates to funding resources so that they can be applied to capital schemes in the delivery of the Council's overall capital strategy.

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- 1.1 On 29 February 2024, Members approved the Budget for the financial year 2024/25. This budget was developed throughout the preceding nine months and took account of all known issues with services identifying and agreeing the resources that they would require for the following year, especially those with demand led budgets. Within that report, and as with previous years, the inherent financial risk within these budgets, especially with respect to Adult Social Care, Children's Services and Education Excellence (Home to School Transport), was identified. This was further reflected within the reserves' strategy for the Council, as reported in the Robustness Report also presented to Budget Council.
- 1.2 This report is the sixth of the Council's monthly budget monitoring reports for 2024/25 and provides the forecast outturn position for all services following a continuing review of forecasts, including the pressures that have materialised since the budget was set.
- 1.3 The report also outlines the current position regarding key income streams for the Authority, namely Council Tax and Business Rates. Variations against expected receipts in these two areas will also affect the Council's financial position in future years.
- 1.4 The capital section of the report informs Members of the latest estimate of capital expenditure for 2024/25 and forecast expenditure for 2025/26 and 2026/27. The capital budget to date is presented in paragraph 7.1. Paragraphs 7.2 to 7.10 review progress of the capital programme. Finally, paragraphs 7.11 to 7.13 confirm that there are adequate levels of resources available to finance the capital programme.

2. Revenue Budget 2024/25 – Forecast Outturn Position as at the end of November 2024

- 2.1 Members are provided with updates of the Council's forecast financial revenue position each month during the financial year from July. As would be expected as the forecast develops through the year, they become more robust and can inform decision making. The Council adopted this approach by developing its in year remedial budget actions on the back of the mid-year review position and this report is the first step that will lead to that.
- 2.2 As at the end of November 2024, the forecast outturn shows a net overspend of **£15.805m**, including the impact of mitigating actions approved at Cabinet on 7th November 2024. This is an increase of **£3.829m** compared to the forest at the end of October 2024. The forecast overspend relates to additional pressures within Adult Social Care, Children's Social Care and Education Excellence (School Travel Support). It should be noted that the majority of services are reporting a balanced position or are implementing local remedial actions to return a balanced position at this stage.
- 2.3 The table below highlights the variations across services that make up the £15.805m forecast overspend:

	Budget	Forecast Outturn	Forecast Variance	Variance to October
	£m	£m	£m	£m
<u>Services</u>				
Strategic Management	4.020	4.020	0.000	0.000
Adult Social Care	122.310	125.431	3.121	0.867
Children's Social Care	82.171	95.872	13.701	2.729
Communities	11.809	11.809	0.000	-0.280
Corporate Resources	11.323	10.941	-0.382	-0.132
Economic Growth & Housing		7.065	0.000	0.000

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Education Excellence	18.090	20.636	2.546	0.000
Health & Wellbeing	19.891	19.518	-0.373	0.000
Highways & Public Protection	11.081	10.704	-0.377	-0.127
Operational In-House Services	18.668	18.418	-0.250	0.000
Property and Building Services	-0.396	-0.396	0.000	0.000
Total Service Net Expenditure	306.032	324.018	17.986	3.057
Council Wide Budgets	10.898	9.678	-1.220	0.233
Levies	37.290	37.290	0.000	0.000
Recruitment Freeze	0.000	-1.000	-1.000	0.000
Non-Essential Expenditure cessation / deferral	0.000	-0.500	-0.500	0.000
Approved mitigating actions now recorded within services	0.000	0.539	0.539	0.539
General Government Grants	-95.740	-95.740	0.000	0.000
Total Net Expenditure	258.480	274.285		
<u>Forecast Year-End Deficit</u>			<u>15.805</u>	<u>3.829</u>

2.4 The key areas relating to the outturn position are as follows:

- Adult Social Care** – Current forecasts are that the Adult Social Care budget will overspend by £3.1m during 2024/25 and reflects an assumption that there will be full achievement of savings proposed by the Service for the year (see below). However, there are a number of significant assumptions and uncertainties that could impact on this position before the year-end. As stated previously, the service has committed to a number of efficiencies and savings that amount to £4.8m, in order to meet the savings approved as part of the approved 2024/25 budget, plus additional savings to meet the additional budgetary pressures arising from the increases in provider fees approved at Cabinet meetings in May 2024. The achievement of these savings will be carefully monitored throughout the year. As at the end of November, £2.4m of the £4.8m of savings have been delivered. The current position reflects the delivery of these savings in full during this year which the Service has confirmed.

Like all councils, the Service is experiencing growth pressure with demand for services and are seeking to meet the cost of this within the resources available. As would be expected with a budget of this size and volatility, this remains a key risk during the current year, with the added uncertainty of whether additional winter pressures or other grant funding would be received in year. Work will continue to be undertaken throughout the year to understand the pressures arising and refine forecasts. As an adverse forecast outturn position is currently forecast work will continue to be undertaken to explore options to ensure that any potential overspend is mitigated. Initial work has identified potential mitigations of £0.7m which are reflected in the forecast overspend reported above.

- Children's Social Care** – The previous forecast reported to Cabinet in December 2024 assumed that the Children's Social Care budget would overspend by £11.0m during 2024/25. The current forecast for the service shows a potential overspend of £13.7m (see below). However, there are a number of significant assumptions and uncertainties that could impact on this position before the year-end. Further work continues to be undertaken to understand the pressures and refine forecasts.

Members will be aware that the 2023/24 approved budget included an additional £21m of investment in the service based on the requirement for additional staffing (including temporary funding for additional a

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including International Social Workers and from staff coming through the social work academy) as well as additional resources to reflect the number of packages at the time, some potential growth as well as resource for inflationary pressures. The 2024/25 approved budget included a further additional £3m to reflect the number of packages at the time as well as resource for inflationary pressures.

The current forecast for staffing is an overspend of £3.7m. A report to Cabinet in May 2024 approved a new staffing structure within the Service, with the cost of the new structure being £2.450m more than the existing staffing budget. Cabinet approved the virement of £2.450m, to fund the increased cost of the new structure, from the Residential Care budget to the staffing budget based on the forecast reduction in packages across the year provided by the Service based on the improvement work that they are undertaking and the performance information that they produced. However, as the new structure is recruited to with permanent staff, significant numbers of existing high-cost agency placements have continued to be required, resulting in a significant overspend being forecast.

Certain areas of accommodation and support packages are now forecast to overspend by £10.8m. The report to Cabinet in May 2024 outlined that budget realignment would be undertaken to ensure budgets reflected the packages in place at the start of 2024/25 as well as the anticipated reduction in Residential Care packages across the year. This was possible because of continuing improvements in practice which have resulted in more children being placed in more appropriate settings at a lower cost. However, the Service has seen additional children having to be placed in a residential setting resulting in a forecast overspend of £7.6m. In addition, the costs of packages for Children with Disabilities had increased, although specialist work continues to be undertaken to ensure health are making the appropriate contributions to the cost of care. These were the two main areas driving the initial forecast overspend.

It was previously assumed that the increase in Residential Care packages would be short-term. However, further work has been undertaken to assess each case and the assumptions made which has identified that some placements will continue for longer than originally assumed. In addition, some further placements, and increases in package costs, have resulted in further spending pressure. At the start of the financial year there were 80 children in residential placements, and this was forecast to decrease to 71 by the end of November (and to 65 at the end of the financial year). However, at the end of November there are 92 children in residential placements. With an average placement cost of approximately £0.3m per year, it is clear what is driving the budget pressure. There has also been an increase in the number of packages for Children with Disabilities.

Further work has also been undertaken to assess each individual case across the different care settings. This forensic analysis will continue each month to ensure forecasts for each individual case are as robust as possible.

As an adverse forecast outturn position is currently forecast work will continue to be undertaken to explore options to ensure that any potential overspend is mitigated. Initial work has identified potential mitigations of £0.5m which are reflected in the forecast overspend reported in the table above.

In considering this forecast, work will also be undertaken to determine if any of this pressure is temporary or permanent in nature and needs reflecting in future budget setting processes. At present it is considered that some of the increase in cost of Residential Care packages is short-term in 2024/25 due to forecast activity in 2025/26, and so it is estimated that the future years impact will be less significant at this stage. Together with Adult Social Care and Home to School Transport this is clearly the biggest risk to the Council's budget and a

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comprehensive review of all residential and other placements, and all agency staff, will continue to be undertaken in order to inform revised forecasts in future months.

This is the most significant budget issue within the Council with pressure of £13.7m. Whilst some mitigations are possible, this will require a substantial call on the Council's General Balances. The Service, in working within this environment, are undertaking the following to ensure that children receive the right support, to enable the right outcomes and invariably deliver the service at a lower cost:

- The DCS signing off on all residential placements after following the key stages of an agreed process.
 - Consideration of residential placements at a weekly External Placement Panel
 - Consideration of care packages at a fortnightly Care Package Review Meeting.
 - A review of applications into care at a weekly SARC Panel
- **Education Excellence** - The current forecast shows a potential net overspend of £2.5m, which mainly relates to Home to School Transport. Members will recall that in this budget, and in previous years' budgets, substantial funding was added to the Home to School Transport budget. However, this budget has come under further pressure due to the significant increase in the number of EHCPs being completed which result in travel support, including more expensive travel relating to out of borough placements.
 - **Other Service Areas** – Most other service areas are currently showing a balanced position. However, based on the initial monitoring undertaken some services are forecasting minor overspends. Work will continue to refine forecasts as more information on expenditure and income becomes available. Services will need to ensure that additional cost control measures are in place between now and the end of the year, and mitigating savings are made to offset any forecast overspend, to ensure each service delivers a balanced position. As part of the remedial action plan approved by Cabinet in November 2024, four services had identified mitigating actions within their areas that could partially contribute to the Council's overall position. These have now been built into individual service forecasts shown in the table above (see paragraph 3.6). In addition, the remedial action plan included savings from a recruitment freeze and a cessation / deferral of non-essential expenditure (see paragraphs 3.4 and 3.8). The impact of these actions has yet to be built into individual service forecasts.
 - **Corporate Budgets** – Whilst the Council continues to achieve positive investment returns on its cash balances. It is forecast that this will achieve additional income of £0.2m in 2024/25. However, due to the impact on cash balances of the High Needs deficit, the Council has had to take out additional borrowing earlier than previously planned for, which is significantly impacting on the forecast surplus that would otherwise be achieved. It is now forecast that the additional costs of borrowing will negate the positive investment returns, with no overall surplus being achieved.

3. Revenue Budget Summary 2024/25

- 3.1 An overspend of £15.805m is currently forecast. However, as mentioned in section 2, this is a forecast based on a number of uncertainties and assumptions, particularly around Adult Social Care, Children's Social Care, and Education Excellence (Home to School Transport), which all remain volatile. Additional work will continue to be undertaken across service areas to refine the forecasts and identify mitigating efficiencies to ensure each service achieves a balanced budget position.
- 3.2 As mentioned, the Council must strive to achieve an overall balanced position to ensure its financial sustainability. Given the overall forecast overspend, a remedial action plan to reduce the residual balance was approved by Cabinet on 7th November 2024, and with the

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budget position having worsened by over £8m in the two months since the measures were approved, it is essential that this is delivered without exception.

Remedial Action Plan

- 3.3 Cabinet on 7th November 2024 approved a number of remedial actions, including the adoption of financial principles used in previous years, to reduce the forecast overspend position to ensure its continued financial sustainability. Based upon the forecast pressure increasing by over £8m in the two months since the measures were approved, it is critical that these measures are delivered without exception. The approved actions are:

Recruitment Freeze

- 3.4 The Council has implemented a recruitment freeze until the end of the financial year. This will apply to all services across the Council with the exception of Children's Social Care. Savings from non-recruitment of current and future vacant posts are estimated to be £1.0m before the end of the financial year.

No Further Overspend in any Service.

- 3.5 All services must manage their budgets to ensure that their forecast outturn position does not worsen from that currently reported.

Remedial Measures within Services.

- 3.6 Measures to achieve savings have been proposed within certain service areas to help to mitigate the financial pressures being experienced by the Council. The anticipated savings from these measures (which are built into the service forecasts) are:

Service:	Proposed Savings:
	£m
Corporate Resources	0.250
Health & Wellbeing	0.100
Highways & Public Protection	0.250
Operational In-House Services	0.250
	0.850

No Further Growth Items or Additionality

- 3.7 All services to pause any requests for growth or additionality, even if it could be funded from current forecast underspends or further underspends compared to the current forecast position. This will ensure that any further underspends can be used to contribute to mitigating the Council's overall financial position. This doesn't apply to expenditure that can be fully met from external funding received by the Council.

Non-Essential Expenditure

- 3.8 A full review is currently being undertaken of all budgets across the Council to identify areas of non-essential spend that could be stopped. This includes reviewing progress on spending in all areas to identify options for where additional expenditure commitments could be paused. This will identify further underspends that can be used to contribute to mitigating the Council's overall financial position. It is estimated that savings of £0.5m can be achieved before the end of the financial year.

Earmarked Reserves

- 3.9 In a previous report, it was outlined that a further review of Earmarked Reserves had identified a reserve that could now be released to support the forecast outturn position (£0.320m). Following the deterioration of the forecast a further review will be undertaken and any reserves that do not come with a specific legal requirement to hold or are not grant funding with no flexibility for use, will be brought to Members for decision on releasing to

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support the in-year position. This will mean that activity previously assumed to be funded will need to be met from service budgets in future years or funded in an alternative way. Based on initial work this may release £5.5m to support the forecast outturn position.

Additional In-Year Funding

- 3.10 Any additional in-year funding that is made available by the Government will be utilised to offset the spending pressures being experienced.

Summary 2024/25

- 3.11 After the implementation of these remedial actions an overspend of **£15.805m** is currently forecast. Whilst remedial actions will continue to be explored to reduce this further, a residual overspend is expected at year-end. Based on this forecast, and in advance of any review of earmarked reserves, this would need to be funded by General Balances. This would reduce these General Balances from the budgeted **£30.3m** to **£14.5m**, which is a 50% reduction and is not sustainable in the immediate or medium term. With the expected release of Earmarked Reserves mentioned in paragraph 3.9, General Balances would be **£20.0m**, still a reduction of one-third. The Council in 2024/25 increased its General Balances by £14m to improve its financial sustainability as it acknowledged that the environment within which it was working continued to pose increased risk and it held at that time a lower level of balances and reserves than many comparator authorities. This increase took account of that forecast risk, benchmarking against other councils, together with best practice and put the Council in a much more robust financial position. In potentially using this level of General Balances, the overall level will reduce to the previous value and will therefore place the Council at increased financial risk, hence the need for this forecast position provided by services to be worked to and delivered in the current year in order that there is no further call on the residual amount. Any further demand on General Balances will further compromise the Council's financial sustainability hence the importance of robust monitoring between now and the end of the year, recruitment and expenditure cessation and critically ensuring expenditure control in those demand led budgets.
- 3.12 As part of the budget setting process for 2025/26 to 2027/28, the Council will need to develop a strategy to increase General Balances back to the level they would have been if they hadn't been utilised to fund an overspend and this may include the repayment of balances by services who have utilised them where appropriate. This strategy will need to take into account the risks faced by the Council and the assessment of their adequacy as described in the S151 Officer's Robustness report.

4. Council Tax Income – Update

- 4.1 Council Tax income is shared between the billing authority (Sefton Council) and the three major precepting authorities (the Fire and Rescue Authority, the Police and Crime Commissioner and the Combined Authority – Mayoral Precept) pro-rata to their demand on the Collection Fund. The Council's Budget included a Council Tax Requirement of £169.759m for 2024/25 (including Parish Precepts), which represents 84% of the net Council Tax income of £202.200m.
- 4.2 The forecast outturn for the Council at the end of November 2024 is a surplus of £0.676m. This variation is primarily due to: -
- The surplus on the fund at the end of 2023/24 being higher than estimated (-£0.312m).
 - Gross Council Tax Charges in 2024/25 being higher than estimated (-£0.458m).

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- Exemptions and Discounts (including a forecasting adjustment) being lower than estimated (-£0.157m).
- Transactions relating to previous years being higher than estimated (+£0.251m)

4.3 Due to Collection Fund regulations, the Council Tax surplus will not be transferred to the General Fund in 2024/25 but will be carried forward to be recovered in future years.

4.4 A forecast surplus of £1.548m was declared on the 16 January 2024 of which Sefton's share is £1.299m (83.9%). This is the amount that will be recovered from the Collection Fund in 2024/25.

5. **Business Rates Income – Update**

5.1 Since 1 April 2017, Business Rates income has been shared between the Council (99%) and the Fire and Rescue Authority (1%). The Council's Budget included retained Business Rates income of £65.692m for 2024/25, which represents 99% of the net Business Rates income of £66.356m. Business Rates income has historically been very volatile making it difficult to forecast accurately.

5.2 The forecast outturn for the Council at the end of November 2024 is a deficit of +£2.181m on Business Rates income. This is due to:

- The surplus on the fund at the end of 2024/25 being lower than estimated (+£2.620m).
- Increase in the gross charge on rateable properties (-£1.175m).
- A number of reliefs announced for 2024/25 were assumed in the NNDR1 return with the loss of income as a result of these reliefs covered by Section 31 grant payments. It is now forecast that the value of these reliefs will be more than anticipated (+£1.006m).
- Adjustments relating to prior years (-£0.270m)

5.3 When taking into account the change in Section 31 grants due on the additional reliefs, a net deficit of £2.085m is forecast.

5.4 Due to Collection Fund regulations, a Business Rates deficit will not be transferred to the General Fund in 2024/25 but will be carried forward to be recovered in future years.

5.5 A forecast surplus of £11.119m was declared in January 2024. Sefton's share of this is £11.008m. This is the amount that will be distributed from the Collection Fund in 2024/25. Any additional surplus or deficit will be distributed in 2025/26 and future years.

6. **High Needs Budget**

6.1 Cabinet and Council have agreed to receive regular reports from the Executive Director of Children's Social Care and Education and the Assistant Director of Children's Services (Education) with regard to the High Needs budget and the changes that are proposed, details of sufficiency planning, the Council's engagement on the Delivering Better Value Programme and the current high needs deficit and the risk around future central government decision making in respect of this deficit.

6.2 A separate report on the High Needs funding position of the Council was presented to Cabinet in July 2024, with the next report due in the first quarter of 2025.

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7. Capital Programme 2024/25 – 2026/27

Capital Budget

7.1 The Capital Budget and profile of expenditure for the three years 2024/25 to 2026/27 is as follows:

2024/25	£78.554m
2025/26	£105.376m
2026/27	£36.459m

7.2 The following updates have also been made to the capital programme budget since the previous budget report to Cabinet in December 2024:

- **Communities**

- £0.578m has been phased to 2025/26 for the Local Authority Housing Fund. Work is continuing to deliver 12 homes for refugee occupation and 1 temporary accommodation dwelling utilising grant funding through the Local Authority Housing Fund Round 2. Seven homes have been acquired so far. The registered housing providers participating in the project have found market conditions challenging with few suitable properties coming to market during Quarter 3 2024/25. It is anticipated that the market should pick up during Quarter 4 and the remaining 5 acquisitions completed within the first half of 2025/26.

- **Economic Growth & Housing**

- The Strand Repurposing Programme budget has been further refined since the initial estimates reported to Cabinet and Council in January 2024. The updated 2024/25 and 2025/26 allocations can be found in Appendix A and these updated estimates have been reported to MHCLG as part of regular monitoring of the Towns Fund grant.

- **Education Excellence**

- £0.244m has been phased to 2025/26 for Linaker Primary School Re-Pitched Roof due to Academisation of school.
- £0.230m has been phased to 2025/26 for Freshfield Primary Modular Classroom and Resources due to the schedule of works.
- £0.533m has been phased to 2025/26 for Holy Family High Ground Works and Two Storey Four Classrooms due to delays with the planning of works.
- £0.450m has been phased to 2025/26 for Marshside Primary Modular Classroom, Groundworks and Resources due to other schemes taking priority.
- £0.215m has been phased to 2025/26 for Merefield Modular Classroom and Resources due to other schemes taking priority.
- £0.228m has been phased to 2025/26 and £0.061m to 2026/27 for Birkdale Primary Pitched Roofs, Fire Precaution, Windows and Brickwork following the agreement of contracts and confirmation of schedule of works.

- **Highways & Public Protection:**

- £0.129m has been phased to 2025/26 for Public Rights of Way Improvements due to a revised forecast for completion of the scheme into the following financial year.
- £0.609m has been phased to 2025/26 for the LED Street Lighting Upgrade project due to extended completion times from a number of recently installed work items that are awaiting District Network Operator (DNO) jointing connections to allow them to be claimed for as completed work activities. This is because the DNO have had to

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prioritise works following significant storm damage to the network, therefore the contractor has implemented mitigation procedures to reduce further delays by making direct appointments of alternative subcontract jointers to work under a tripartite agreement to deliver the outstanding and future programme of works as quickly as possible.

- **Property and Building Services**

- £0.032m has been added to the 2024/25 budget for the Sefton Climate and Retrofit Action Project funded by grant from the National Lottery following approval by Cabinet in November.
- Work has been undertaken to further refine the phase two Corporate Essential Maintenance programme that is anticipated to deliver a number of schemes over 2024/25 to 2026/27 financial years. A breakdown of the revised phase two allocations is provided below and these updated estimated have been included in the capital programme budgets reported above:

	2024/25	2025/26	2026/27
	£	£	£
Corporate Buildings	70,000	2,425,000	2,366,296
Other Civic Buildings	39,893	1,223,107	-
Adult Social Care	30,000	168,464	-
Car Parks	20,000	80,000	-
Leisure, Health & Wellbeing	210,000	204,000	-
Green Sefton	30,000	70,000	-
Localities	-	110,000	-
Economic Growth	-	-	169,000
Asset Management	160,000	11,612	-
TOTAL	559,893	4,292,183	2,535,296

Budget Monitoring Position to November 2024

- 7.3 The current position of expenditure against the budget profile to the end of November 2024 is shown in the table below. It should be noted that budgets are profiled dependent upon the timing of when works are to be carried out and the anticipated spend over the financial year. The budget to date in the table below reflects the profiles of each individual scheme.

	Budget to November	Actual Expenditure to November	Variance to November
	£m	£m	£m
<u>Services</u>			
Adult Social Care	3.287	3.259	-0.028
Children's Social Care	0.313	0.301	-0.013
Communities	0.630	0.368	-0.263
Corporate Resources	0.902	0.751	-0.151
Economic Growth & Housing	8.088	7.330	-0.758
Education Excellence	3.021	3.035	0.014
Highways & Public Protection	10.078	8.556	-1.522
Operational In-House Services	2.641	2.887	0.246
Property and Building Services	5.000	4.984	-0.016
<u>Total Programme</u>	33.961	31.470	-2.491

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Capital Programme Forecast Outturn 2024/25

7.4 The current forecast of expenditure against the budget profile to the end of 2024/25 and the profile of budgets for future years is shown in the table below:

	Budget 2024/25	Foreca st Outturn	Varianc e	Budget 2025/26	Budget 2026/27
	£m	£m	£m	£m	£m
<u>Services</u>					
Adult Social Care	8.479	8.377	-0.103	2.433	0.546
Children's Social Care	2.633	2.633	-	-	-
Communities	1.135	1.127	-0.008	0.733	-
Corporate Resources	1.686	1.686	-	0.090	-
Economic Growth & Housing	20.526	20.466	-0.060	51.487	21.281
Education Excellence	7.059	6.923	-0.135	9.815	0.060
Highways & Public Protection	25.717	25.406	-0.311	29.745	10.421
Operational In-House Services	5.627	5.627	-	6.681	1.515
Property and Building Services	5.691	5.691	-	4.392	2.635
<u>Total Programme</u>	78.554	77.937	-0.617	105.376	36.459

*A full list of the capital programme by capital scheme is at **appendix A**.*

7.5 The current 2024/25 budgeted spend is £78.554m with a budgeted spend to November of £33.961m. The full year budget includes exceptional items such as £14.707m for Growth and Strategic Investment projects, £3.377m for new Council Housing schemes, £10.487m for major Highways projects, a £2.707m project for Southport Pier Decking, a one-off budget for a major property acquisition (£4.775m), a scheme to upgrade to LED Street Lighting (£2.850m), and £2.000m for Transformation Projects.

7.6 It should be noted that based on evidence from previous years, it is likely that further reprofiling of spend into 2025/26 will occur as the year progresses, as £80m of capital expenditure would be a significant programme delivered in year- it is therefore essential that all projects are reviewed in a robust manner in order that informed decision making in respect of financial management and member decision making can be undertaken.

Local Authority Housing Fund Round 3

7.7 In September 2023 Council approved a capital allocation of £1.3m for the Local Authority Housing Fund (LAHF) Round 2 to deliver 12 homes and 1 temporary accommodation unit funded by grant from the Ministry of Housing Communities and Local Government (MHCLG). The LAHF helps UK councils to provide accommodation to families with housing needs who have arrived in the UK through Afghan resettlement and relocation schemes and who are accessing bridging hotel accommodation. The intention of the LAHF round two was to address immediate pressures as well as increasing the stock of affordable homes for the future.

7.8 Sefton has now been granted funding under round three of the Local Authority Housing Fund (LAHF). The funding will be utilised under the same premise as round two and is expected to deliver a total of five homes and temporary accommodation unit. The Resettlement

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cohort, Afghan refugees under the Afghan Citizens Resettlement Scheme, that will occupy these homes will also enable the Council to claim additional revenue grant to support community integration.

- 7.9 The Council has entered into a Memorandum of Understanding with the MHCLG in order to release the funding. Cabinet is therefore requested to approve a supplementary capital estimate for £651,000 to include the scheme in the capital programme for 2025/26 and a supplementary revenue estimate of £4,700 for inclusion in the revenue budget.

Network North Roads Resurfacing Fund

- 7.10 Cabinet in June 2024 approved an allocation of grant from the Liverpool City Region Combined Authority (LCRCA) for the Network North Roads Resurfacing Fund for inclusion in the 2024/25 Highways Capital Programme. A further round of funding has now been confirmed by the LCRCA for the continuation of this scheme and Cabinet is therefore requested to approve a supplementary capital estimate of £449,302 for the additional grant.

Programme Funding

- 7.11 The table below shows how the capital programme will be funding in 2024/25:

<u>Source</u>	<u>£m</u>
Grants and Other Contributions	56.643
Prudential Borrowing	16.278
Capital Receipts	5.434
Revenue Contributions	0.198
<u>Total Programme Funding</u>	<u>78.554</u>

- 7.12 The programme is reviewed on an ongoing basis to confirm the capital resources required to finance capital expenditure are in place, the future years programme is fully funded, and the level of prudential borrowing remains affordable.
- 7.13 The Executive Director of Corporate Services and Commercial will continue to manage the financing of the programme to ensure the final capital funding arrangements secure the maximum financial benefit to the Council.

2. Financial Implications

All financial implications are reflected within the report.

3. Legal Implications

None

4. Corporate Risk Implications

This report highlights the financial position of the Council in 2024/25, which supports its Financial Sustainability in 2024/25 and future years.

5. Staffing HR Implications

None

6. Conclusion

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Based on current forecasts, the Council is again faced with a challenging financial environment during 2024/25 as a result of pressures within Adult Social Care, Children's Social Care and Education Excellence (Home to School Transport). A revenue overspend of £15.805m is currently forecast, which would reduce to £10.305m with the forecast release of Earmarked Reserves to support the budget position.

Alternative Options Considered and Rejected

None

Equality Implications: There are no equality implications.
Impact on Children and Young People: None
Climate Emergency Implications: The recommendations within this report will have a Neutral impact. The allocations of capital funding outlined in section 7 may be spent on projects that will have a high climate change impact as they could relate to new build, rebuild, refurbishment, retrofit and demolition proposals. Environmental consideration will be taken into account when specific projects are designed and tendered – which will help to mitigate negative impacts.

What consultations have taken place on the proposals and when?

(A) Internal Consultations

The Executive Director of Corporate Services and Commercial is the author of this report (FD7899/24).

The Chief Legal and Democratic Officer (LD5999/24) has been consulted and any comments have been incorporated into the report.

(B) External Consultations

None

Implementation Date for the Decision:

Following the expiry of the "call-in" period for the Cabinet.

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Appendices:

The following appendices are attached to this report:

APPENDIX A – Capital Programme 2024/25 to 2026/27

Background Papers:

None

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APPENDIX A – Capital Programme 2024/25 to 2026/27

Capital Scheme	Budget		
	2024/25 £	2025/26 £	2026/27 £
Adult Social Care			
Disabled Facilities Grants	3,500,000	-	-
Occupational Therapist Support	636,359		
ICT Development & Transformation	1,006,022	-	-
ICT Connectivity in Care Homes and Support Living	20,000	-	-
Care Home Improvements	529,038	-	-
Integrated Health and Wellbeing on the High Street	100,000	-	-
Short Term Assessment Unit	500,000	2,393,034	546,034
New Directions Programme	475,010	40,000	-
Technology Enabled Care	330,250	-	-
Programme Support	127,900	-	-
Changing Places	36,071	-	-
Falls Prevention Schemes	100,000	-	-
Digitising Social Care	136,393	-	-
Mobile Clinic	89,000	-	-
Community Equipment	893,000	-	-
Children's Social Care			
Support for Fostering Placements	50,000	-	-
Special Guardianship Order – Property Purchase Grant	100,000		
Community Equipment	410,000	-	-
Springbrook Works and Vehicle	73,017	-	-
Children's Social Care Transformation	2,000,000	-	-
Communities			
Atkinson Arts Centre – Infrastructure & Windows	169,555	-	-
Local Authority Housing Fund	718,765	578,235	-
Leisure Centres – Essential Works	135,445	15,566	-
Libraries Projects	86,445	139,361	-
Neighbourhoods Schemes	24,869	-	-
Corporate Resources			
ICT Development & Transformation	688,498	-	-
ICT Data Centre Relocation	400,000	-	-
ICT Equipment Refresh	360,000	90,000	-
Committee Meeting Live Streaming System	147,806	-	-
Community Recovery Fund	90,000	-	-
Economic Growth & Housing			
Cambridge Road Centre Redevelopment	170,983	-	-
Strategic Acquisitions – Ainsdale	155,000	469,303	-
Marine Lake Events Centre	5,651,282	37,866,796	21,280,701
Enterprise Arcade	1,252,977	35,418	-
The Strand – Maintenance & Improvements	120,330	-	-
The Strand – Repurposing Programme	7,192,768	12,237,724	-
Changing Places Facilities	109,168	-	-

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	2024/25 £	2025/26 £	2026/27 £
Brownfield Housing Fund	1,032,281	-	-
Council Housing Early Acquisitions Scheme	-	750,000	-
Council Housing at Buckley Hill Lane	2,080,462	1,150	-
Southport Pier	2,706,736	86,580	-
Town Centre Vacant Sites	54,016	-	-
Red Rose Park Works	-	40,000	-
Education Excellence			
Early Years	534,202	-	-
General Planned Maintenance	397,262	-	-
Schools Programme	3,248,730	7,117,465	60,637
Sporting Betterment of Schools	654,045	667,343	-
Special Educational Needs & Disabilities	2,224,321	2,029,812	-
Highways and Public Protection			
Accessibility	452,304	200,000	-
Healthy Lifestyles	356,125	129,220	-
Road Safety	194,956	-	-
A565 Route Management and Parking	300,500	-	-
A565 Northern Key Corridor Improvements	96,369	-	-
A59 Route Management Strategy	1,280,000	3,563,357	-
Strategic Planning	3,368,053	4,084,779	-
Traffic Management & Parking	39,000	1,067,000	-
Southport Eastern Access	2,285,636	8,879,030	8,805,334
Maritime Corridor	4,771,239	7,531,761	-
Highway Maintenance	5,526,036	-	-
Bridges & Structures	685,143	1,750,000	-
Drainage Improvement	278,672	-	-
Street Lighting	300,000	-	-
Street Lighting LED Upgrade	2,850,183	608,565	-
Urban Traffic Control	1,317,160	315,018	-
Highways Capitalisation	1,616,000	1,616,000	1,616,000
Operational In-House Services			
Coastal Erosion and Flood Risk Management	1,603,392	1,551,809	1,420,273
Countryside Stewardship	1,740	-	-
Parks Schemes	282,643	729,017	-
Tree Planting Programme	574,072	94,879	94,879
Golf Driving Range Developments	2,197	280,280	-
Ainsdale Coastal Gateway	543,739	-	-
Green Sefton – Vehicles, Plant & Machinery	1,670,000	326,237	-
Refuse Collection & Recycling	345,000	2,644,182	-
Vehicle Replacement Programme	604,610	1,054,494	-
Property and Building Services			
Acquisition of Magdalen House	4,775,400	-	-
Council Wide Essential Maintenance	324,070	100,000	100,000
<u>Council Wide Essential Maintenance Phase 2:</u>			
- Corporate Buildings	70,000	2,425,000	2,366,296

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	2024/25 £	2025/26 £	2026/27 £
- Other Civic Buildings	39,893	1,223,107	-
- Adult Social Care	30,000	168,464	-
- Car Parks	20,000	80,000	-
- Leisure, Health & Wellbeing	210,000	204,000	-
- Green Sefton	30,000	70,000	-
- Localities	-	110,000	-
- Economic Growth	-	-	169,000
- Asset Management	160,000	11,612	-
Sefton Climate & Retrofit Action Project	32,000	-	-
<u>Total Programme</u>	78,554,138	105,375,598	36,459,154

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