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Sefton Council 

MEETING: CABINET
DATE: Thursday 26th July, 2018
TIME: 10.00 am
VENUE: Committee Room, Town Hall, Bootle

DECISION MAKER: **CABINET**

Councillor Maher (Chair)
Councillor Atkinson
Councillor Cummins
Councillor Fairclough
Councillor Hardy
Councillor John Joseph Kelly
Councillor Lappin
Councillor Moncur
Councillor Veidman

COMMITTEE OFFICER: Ruth Harrison
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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.

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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 21 June 2018		(Pages 7 - 16)
* 4	Special Educational Needs and Disability Process of Assessment Working Group - Final Report Report of the Head of Regulation and Compliance	All Wards	(Pages 17 - 48)
5	Parks and Greenspaces Final Report Report of the Head of Regulation and Compliance	All Wards	(Pages 49 - 66)

* 6	Approval of Legal Documentation for Academy Conversions Report of the Head of Schools and Families	All Wards	(Pages 67 - 72)
* 7	Sand Dunes Nursery School – proposal to commence statutory consultation Report of the Head of Schools and Families		(Pages 73 - 80)
* 8	Approval of Pro Forma for Sustainable Drainage Systems document, Guidance notes and SuDs and Flood risk Information Notes Report of the Head of Locality Services - Commissioned	All Wards	(Pages 81 - 86)
9	Revenue Budget Outturn 2017/18 Report of the Head of Corporate Resources	All Wards	(Pages 87 - 96)
* 10	Sefton Economic Strategy Framework Report of the Executive Director	All Wards	(Pages 97 - 180)
11	Housing DevCo - Land Assembly Report of the Executive Director		(Pages 181 - 184)
12	Exclusion of Press and Public		

To comply with Regulation 5(2) of the Local Authorities (Executive Arrangements) (Meetings and Access to Information)(England) Regulations 2012, notice has been published regarding the intention to consider the following matter(s) in private for the reasons set out below.

No representations have been received on this matter and this agenda satisfies the requirements of Regulation 5(4).

The Cabinet is recommended to pass the following resolution:

That, under the Local Authorities (Executive Arrangements) (Meetings and Access to Information)(England) Regulations 2012, the

press and public be excluded from the meeting for the following item on the grounds that it involves the likely disclosure of exempt information as defined in Paragraph 3 of Part 1 of Schedule 12A to the Local Government Act 1972. The Public Interest Test has been applied and favours exclusion of the information from the Press and Public.

13 Housing DevCo - Land Assembly

Members and Officers with access rights should refer to their supplementary agenda

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THE "CALL IN" PERIOD FOR THIS SET OF MINUTES ENDS AT 12 NOON ON THURSDAY 5 JULY, 2018.

CABINET

MEETING HELD AT THE BIRKDALE ROOM, TOWN HALL, SOUTHPORT ON THURSDAY 21ST JUNE, 2018

PRESENT: Councillor Maher (in the Chair)
Councillors Atkinson, Cummins, Fairclough, Hardy,
John Joseph Kelly, Lappin, Moncur and Veidman.

12. APOLOGIES FOR ABSENCE

No apologies for absence were received.

13. DECLARATIONS OF INTEREST

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

14. MINUTES OF THE PREVIOUS MEETING

Decision Made:

That the minutes of the Cabinet Meeting held on 24 May 2018 be confirmed as a correct record.

15. PROCUREMENT OPTIONS FOR LIVING WELL SEFTON

The Cabinet considered the report of the Head of Health and Wellbeing that sought approval to complete a tender exercise to re-procure the Community Programme of the Living Well Sefton Service (LWS) which was due to expire on the 31st March 2019. The procurement exercise would be an enhancement of the current service and would include;

- An LWS service enhancement to incorporate delivery of the Health Check programme in line with its revised budget reduction
- A formal alignment of Early Intervention and Prevention Level 3 (EIP3) outcomes linked to current models of delivery
- An enhancement of the current LWS delivery model to extend the provision and emphasis of financial advice and support, in line with increased demands of local people, for welfare advice and signposting due to public sector reform.
- A revised re- procurement would involve one single community contract. This would complement the current Stop Smoking contract (expires 31st March 2019 with option for 3 x 1 year

Agenda Item 3

CABINET- THURSDAY 21ST JUNE, 2018

extensions) and the existing internal Active Sefton SLA.

A procurement exercise based on a lead provider would ensure effective coordination, robust performance management, appropriate sub-contracting and governance arrangements to support this revised and enhanced model.

Decision Made: That the Cabinet:

- (1) authorise the Director of Public Health to conduct an OJEU Light Touch Regime tender exercise for the LWS to run for a period of three years from 1st April 2019 with the option of two further one-year extensions;
- (2) note that the exercise included an ability to build into the procurement, a scoring criteria for the successful lead provider to clearly demonstrate how community providers would deliver the model using the voluntary, community and faith sector (VCF). Procurement Services would support Public Health to develop the scoring criteria to ensure this is done effectively and appropriately, and will be based on MEAT (Most Economically Advantageous Tender) taking into consideration a balance between quality and cost. Once the scoring criteria have been developed, formal approval of weighting will be sought from Cabinet Member for Health and Wellbeing;
- (3) note, a comprehensive early intervention and prevention service (LWS) remains in Sefton and incorporates the Health Check programme;
- (4) agree that the current contracting position will change, where multiple contracts will be replaced with one single prime community contract, which will sub-contract health and well-being services from the VCF; and
- (5) approve the basis of evaluation of the tenders as set out in this report; and the Director of Public Health, in consultation with the Cabinet Member for Health and Wellbeing, be granted delegated powers to award the new contract to the highest scoring bidder(s) in accordance with the approved basis of evaluation and to report on the outcome to the Cabinet Member for Health and Wellbeing.

Reasons for the Decisions:

The LWS is enhancing its operating model to enable services to work collectively to ensure that local residents get all of the information and support they need to improve their health and make lasting behaviour change. Continued investment in the programme beyond the original contract period of April 2019, will ensure the key outcomes of EIP3, which includes developing community resilience and reducing dependency on

CABINET- THURSDAY 21ST JUNE, 2018

services, are optimised.

This community approach will be able to influence early intervention, referral triage when appropriate, increased low-level and self-support, inclusion, connection, cross-partner and individual ownership, choice and control. This will be enhanced by the incorporation of Health Checks into the LWS. (It is worth noting, for completeness, that the Health Check Programme has already been absorbed into the LWS (8th January 2018), Health and Wellbeing Cabinet Member Meeting, Agenda Item 11 - Living Well Sefton).

In line with EIP3 outcomes, the LWS will continue to develop a robust social prescribing programme; increase capacity building through Making Every Contact Count (MECC), and roll out a fully developed behaviour change programme available to all partners. In addition, the LWS will support the development of innovation and local entrepreneurial opportunities through the community grants scheme, and extend the model across health, social care and housing.

The LWS will build on the emerging community need for information and financial advice via welfare support mentors. As the impact of welfare reform and Universal Credit is realised, the LWS is well positioned in community settings to offer advice and support to people affected. Mentors will be trained to offer additional financial support across wider LWS providers with a dedicated CAB trained advisor to support the wider LWS providers.

Alternative Options Considered and Rejected:

The implications of deciding not to procure replacement services would be;

- Contracts for Sefton's LWS will expire resulting in a lack of service provision for local residents. If permission is not granted, there will be no commissioned provision to support the EIP programme, particularly EIP3 where outcomes have been aligned to the LWS. In addition, delivery of the mandated Health Checks programme will be compromised as this has been included in the new LWS model.
- The LWS is the key delivery arm of EIP3 outcomes and is designed to reduce dependency on services by building community resilience. A longer term approach to building resilience will be also compromised and may have negative consequences with the emerging needs of vulnerable people following welfare reform.
- The current commission is comprised of separate contracts with a variety of providers. This could be more economically efficient, and does not play to the strengths of individual providers. The proposed new commission has significant potential to reduce management costs, identify service

Agenda Item 3

CABINET- THURSDAY 21ST JUNE, 2018

excellence via a single provider sub-contracting with VCF organisations and purchasing specialist services.

- An increase in residents with multiple unhealthy lifestyle behaviours such as smoking, over weight and obesity and low mental wellbeing.
- A potential increase in expenditure for adult social care services if prevention services do not exist.

16. SAFEGUARDING CHILDREN FROM CHILD SEXUAL AND CRIMINAL EXPLOITATION AND CHILDREN REPORTED AS MISSING.

The Cabinet considered the report of the Head of Children's Social Care detailing the work agencies have undertaken to safeguard children from child sexual and criminal exploitation and children who have been reported as missing from home / care.

Decision Made:

That the work taking place in Sefton regarding Child Sexual and Criminal Exploitation and safeguarding children who have been reported as missing from home / care, be noted.

Reasons for the Decision:

To ensure Cabinet members are aware of the partnership activity undertaken to safeguard children from child sexual and criminal exploitation in Sefton and when they have been reported as missing, in respect of the statutory duties of every local authority to safeguard and promote the welfare of children within their area who are in need.

Alternative Options Considered and Rejected:

None.

17. CONFIRMATION OF ARTICLE 4 DIRECTION FOR HOUSES IN MULTIPLE OCCUPATION (HMOS)

The Cabinet considered the report of the Chief Planning Officer in relation to the confirmation of the making of a non-immediate Article 4 Direction in relation to Houses of Multiple Occupation in parts of Bootle, Seaforth, Litherland, Waterloo and Southport. The Article 4 Direction was made in September 2017 and sought to restrict permitted development rights in those areas from houses to houses in Multiple Occupation.

Decision Made:

That the Cabinet agreed to the making of a non-immediate Article 4 Direction, as detailed in the report and Appendices to the report, to come

CABINET- THURSDAY 21ST JUNE, 2018

into force on 20 September 2018, one year after it was made, be approved.

Reasons for the Decision:

People can, as permitted development rights under the General Development Permitted Order 2015 (as amended), convert their homes to a small (i.e. containing 6 or fewer individuals) House in Multiple Occupation (HMOs) in parts of Sefton. Once the Article 4 Direction comes into effect, planning permission will be required before such changes of use can take place, and this will ensure the Council has control of these proposals. The Council will therefore be able to consider whether the proposals, either individually, or in combination, will have a detrimental impact on residential amenity.

The Article 4 Direction will work in parallel with the HMOs licensing that has recently been introduced in parts of Sefton.

Alternative Options Considered and Rejected:

Do not introduce the Article 4 Direction. The Council would not have control of conversion to small HMOs (i.e. for occupation by between 3 and 6 unrelated people) in the areas identified in Appendices B and C. There is a risk of clusters of HMOs occurring which may impact on residential amenity. Larger HMOs (i.e. those with accommodation for more than six unrelated people) already require planning permission and will not be affected by this Direction.

18. ADOPTION OF 5 SUPPLEMENTARY PLANNING DOCUMENTS AND INFORMATION NOTES

The Cabinet considered the report of the Chief Planning Officer in relation to a recent consultation regarding 5 Supplementary Planning Documents (SPDs) relating to Affordable, special needs Housing and Housing Mix; House Extensions; Flats and Houses in Multiple Occupation (HMO's); New Housing.

Having considered the responses received, in conjunction with the Cabinet Member: Planning and Building Control, it is proposed that the SPDs, incorporating any changes recommended in the report, should be adopted as Council policy. This will enable them to be given 'full weight' as material considerations when planning applications are determined.

In addition to the SPDs being replaced, it is also proposed to revoke the Southport Seafront SPD. This was adopted in 2003 and has been largely superseded by policies in the Sefton Local Plan and the Southport Strategy and other guidance.

Work is likely to commence on the preparation of SPDs relating to Shop fronts, signage and security, and A Boards, Pavement Cafes and Outdoor trading in the near future.

Agenda Item 3

CABINET- THURSDAY 21ST JUNE, 2018

Decision Made: That the Cabinet agreed to:

- (1) adopt the following SPDs:
 - Affordable, Special Needs Housing and Housing Mix;
 - House Extensions;
 - Flats and Houses in Multiple Occupation (HMO's);
 - New Housing;
 - Sustainable Travel; and
 - Southport Seafront SPDs; and
- (2) revoke the existing SPDs, as detailed in paragraph 7.1 to the report by replacing them with the newly adopted SPDs detailed in recommendation (1) above.

Reasons for the Decision:

It is necessary for the Council to adopt the Supplementary Planning Documents (SPDs) in order to provide clear and consistent guidance for developers and others about how the requirements of policies in the Sefton Local Plan will be interpreted and implemented.

Alternative Options Considered and Rejected:

The alternative would be not to adopt the SPDs. However, this is contrary to the requirements of the Sefton Local Plan, and would result in similar information being provided in relation to all relevant planning applications. In addition, if there were no adopted SPDs, the guidance would not be able to be given the same weight in the decision-making process as with the SPDs in place. This would also result in the inefficient use of resources.

19. REVENUE AND CAPITAL BUDGET PLAN 2017/18 – 2019/20 - LOCALLY ADMINISTERED BUSINESS RATES RELIEF SCHEME

The Cabinet considered the report of the Head of Corporate Resources requesting it to consider and recommend to Council the basis for the Locally Administered Discretionary Revaluation Relief Scheme for 2018/19 and beyond for businesses in Sefton that have had a significant increase in their Business rate liability as a result of the Government's 2017 revaluation.

Decision Made: That:

- (1) the parameters of the discretionary revaluation relief scheme as set out in Annex A, to the report for consultation with the Council's major preceptors and the combined authority, be agreed;
- (2) the outcome of the review of the 2017/18 discretionary revaluation relief scheme as set out in Section 2 of the report, be noted;

CABINET- THURSDAY 21ST JUNE, 2018

- (3) Council be commended to agree the parameters of the discretionary revaluation relief scheme for 2018/19, 2019/20 and 2020/21 as set out in Annex A of this report subject to consideration of any consultation responses received from major preceptors and the combined authority;
- (4) Council be commended to grant delegated authority to the Head of Corporate Resources to determine the detailed application and administration of the local discretionary revaluation relief for 2018/19, 2019/20 and 2020/21 subject to the parameters set out in Annex A; and
- (5) Council be commended to agree that a review of the discretionary rate relief scheme for 2018/19, 2019/20 and 2020/21 be reported to Cabinet Member for Regulatory, Compliance and Corporate Services following the end of each year.

Reasons for the Decisions:

The Council is required to approve a local business rates revaluation relief scheme for 2018/19, 2019/20 and 2020/21 in order to distribute the available government grant to local businesses.

Alternative Options Considered and Rejected:

- Not to make available discretionary support in 2018/19 and beyond to businesses affected by the Business Rates Revaluation of 2017. Such course of action would fail to support our local businesses or utilise the extra funding made available to the Council by the Government for this purpose.
- To replicate the 2017/18 principles and award relief to all eligible businesses with a rateable value of up to £200,000. However, this would not address the reduction in funding in 2018/19 and the fact that many of the large businesses rejected the awards in 2017/18 due to state aid rules. This in turn could lead to a second billing exercise and additional administration costs for the Council.
- To require Council to approve the detailed scheme parameters on an annual basis. This would delay the distribution of the available funding to eligible businesses.

20. REVENUE AND CAPITAL BUDGET UPDATE - TREASURY MANAGEMENT OUTURN 2017/18

The Cabinet considered the report of the Head of Corporate Resources that detailed the treasury management activities undertaken to 31st March 2018. Cabinet received the outturn report to enable it to review against the Treasury Management Policy & Strategy and Prudential Indicators. It was reported that the report would also be considered by the Audit & Governance Committee, whose role it is to carry out scrutiny of treasury

Agenda Item 3

CABINET- THURSDAY 21ST JUNE, 2018

management policies and practices.

Decision Made:

That the treasury management Outturn to 31st March 2018, be noted.

Reasons for the Decision:

To ensure that Members are fully apprised of the treasury activity undertaken to 31st March 2018 and to meet the reporting requirements set out in Sefton's Treasury Management Practices and those recommended by the CIPFA code.

Alternative Options Considered and Rejected:

None

21. REVENUE AND CAPITAL BUDGET PLAN 2017/18 – 2019/20 - JUNE 2018

The Cabinet considered the report of the Head of Corporate Resources in relation to the capital outturn position in relation to the 2017/18 financial year and of further additions to the 2018/19 capital programme.

Decision Made: That the Cabinet:

- (1) note the capital outturn position for 2017/18; and
- (2) approve further additions to the 2018/19 Capital Programme, as detailed in the report.

Reasons for the Decision:

The production of a capital outturn report is a key feature of effective financial management and will allow Members to make informed decisions that will support service delivery and medium term financial sustainability. Member approval is required for addition of new schemes in the Capital Programme.

Alternative Options Considered and Rejected:

None.

22. JILL COULE - HEAD OF REGULATION AND COMPLIANCE

The Chair, Councillor Maher, indicated that this was the last meeting of the Cabinet to be attended by Jill Coule, Head of Regulation and Compliance. Jill had been with Sefton since 2010 but would be leaving the Authority at the end of June to take up the position of Chief Legal Officer to the Liverpool City Region Combined Authority. On behalf of the Cabinet Councillor Maher placed on record its appreciation for all the help and guidance Jill had given to Members and wished her every success for the future in her new role at the Combined Authority.

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Agenda Item 4

Report to:	Overview and Scrutiny Committee (Children's Services and Safeguarding) Cabinet	Date of Meeting:	10 July 2018 26 July 2018
Subject:	Special Educational Needs and Disability Process of Assessment Working Group - Final Report		
Report of:	Head of Regulation and Compliance	Wards Affected:	(All Wards);
Portfolio:	Cabinet Member - Children, Schools and Safeguarding		
Is this a Key Decision:	Yes	Included in Forward Plan:	Yes
Exempt / Confidential Report:	No		

Summary:

To formally present the final report of the Special Educational Needs and Disability Process of Assessment Working Group.

Recommendation(s):

Overview and Scrutiny Committee (Children's Services and Safeguarding)

That the following recommendations be supported and commended to the Cabinet for approval:-

Cabinet

That provided the recommendations are subject to any budget implications and the inclusion of the revised recommendation 1. (h), as amended by the Overview and Scrutiny Committee (Children's Services and Safeguarding) on 10 July 2018, the following recommendations be approved:-

1. That the Head of Schools and Families be requested to:-
 - (a) Review the current provision of Special Educational Needs (SEN) units within schools, in order to ensure that appropriate provision is available within the relevant schools, as evidence provided suggests that the current system is not meeting the needs of children and their families appropriately.
 - (b) Encourage relevant schools to consider an alternative term for "SEN unit", possibly describing themselves as a "SEN-friendly school", in order to reduce stigma and improve compliance with the Equality Act.
 - (c) Liaise with the Sefton Clinical Commissioning Groups and Alder Hey

Agenda Item 4

Children's NHS Foundation Trust in order to explore the possibility of requesting assessment appointments by professional experts to be carried out in schools wherever possible, particularly specialised schools and those schools with a unit, in order to provide a "safe" environment for children, with less preparation required for those children who experience anxiety when their routine is disrupted.

- (d) Encourage those schools that have a SEN unit to have a dedicated Special Educational Needs Co-ordinator (SENCO), particularly where there are a high proportion of children with SEND, as evidence provided indicates that access to appropriate resources is greater in settings where there is a dedicated SENCO.
- (e) Encourage schools to include SENCOs on the management team for the school, in order to enhance the profile of SEND.
- (f) Encourage schools to support SENCOs to undertake referrals of children with SEND for professional input and assessment appointments, in order to minimise delays in obtaining Education, Health and Care Plans (EHCPs).
- (g) Explore the possibility, in conjunction with the Council's Senior Educational Psychologist, of encouraging schools to undertake joint training on SEND for parents/carers' groups within schools, with teachers and governors, in order to ensure that the information and approach provided are consistent, appropriate embedded.
- (h) Include Frequently Asked Questions (FAQs) for parents/carers of children with SEND within the information available on school admissions, as part of the "school readiness" approach, in order to create an efficient and effective home-school partnership from the outset, in conjunction with the Assessment, Resource and Provision Planning Team.
- (i) Explore the possibility of increasing communication with parents/carers on SEND through the Borough's Family Wellbeing Centres, particularly from an early years' perspective and possibly through the development of leaflets, in order to enhance "school readiness" for the children and their parents/carers.
- (j) Liaise with the Sefton Clinical Commissioning Groups to explore the possibility of requesting that information on SEND for parents/carers is included with/within the Personal Child Health Record (red book) and through the Healthy Child Programme, in order to assist in early intervention.
- (k) Encourage schools to include potentially useful contacts and useful events on SEND within school newsletters, in order to ensure that all parents/carers have access to them.
- (l) Encourage primary schools to share good practice and to consider undertaking inclusivity education with all children, particularly relating to SEND and neuro-diversity, in order to raise standards and ensure equitable and universal access to provision within schools.

- (m) Revise Sefton's Local Offer in order to make it more user-friendly and accessible to parents/carers, which could include ensuring that it is easier to find on the Council's web-site, using less formal language and the inclusion of a glossary of terms and abbreviations.
 - (n) Liaise with the Council's Head of Health and Wellbeing in order to:
 - (i) Encourage schools to advertise and promote the School Nurse drop-in sessions within their newsletters, so that parents/carers have a greater opportunity to access them.
 - (ii) Request the School Nursing Service to approach the SENCO Forum, with a view to discussing the Healthy Schools Programme and to clarify the role of the School Nurse, particularly in relation to assessing children with SEND and in order to minimise delays in obtaining EHC Plans, as this would help to manage the expectations of parents/carers.
 - (o) Submit a report to a future meeting of the Overview and Scrutiny Committee (Children's Services and Safeguarding), following an audit, providing information on the following:-
 - (i) Any high schools which are restricting the number of enhanced transitions for SEND, together with explanations for the reasons behind the decisions.
 - (ii) The number of children with SEND accessing Sefton schools who come from outside the Borough and the reasons for this.
 - (iii) Consideration of how parents who have children with SEND and who are not engaging with schools could be engaged, or re-engaged.
 - (iv) Whether funding has been withdrawn for children with SEND in Year 6 and the reasons for withdrawal.
2. That the Head of Health and Wellbeing be requested to ensure that the School Nurse carries out their role prior to any collaboration with the school SENCO, in relation to assessing and referring children with SEND, in order to minimise delays in obtaining EHC Plans.
 3. That the Overview and Scrutiny Committee (Children's Services and Safeguarding) be requested to consider the establishment of a Working Group in the future to examine post-19 provision for SENDs, in order to improve conditions for this vulnerable group of young people. This could be a Joint Working Group with the Overview and Scrutiny Committee (Regeneration and Skills).
 4. That the Senior Democratic Services Officer be requested to liaise with relevant officers in order to ensure that the Overview and Scrutiny Committee (Children's Services and Safeguarding) receives a six-monthly monitoring report, setting out progress made against each of the recommendations outlined above and as a

Agenda Item 4

means of ensuring SMART objectives.

Reasons for the Recommendation(s):

The Working Group has made a number of recommendations that require approval by both the Overview and Scrutiny Committee (Children's Services and Safeguarding) and the Cabinet.

Alternative Options Considered and Rejected: (including any Risk Implications)

No alternative options were considered. The Overview and Scrutiny Committee (Children's Services and Safeguarding) established the Working Group to review special educational needs and disability process of assessment and the Working Group has performed this task.

What will it cost and how will it be financed?

(A) Revenue Costs

The support for SEN provision in schools is funded through the High Needs Block of the Dedicated Schools Grant. The High Needs Block is overspent by £1.5m and is under significant financial pressure due to the number of children requiring SEN specialist provision / 1:1 support in schools. Costs need to be reduced to keep within budget and avoid impacting on the Council's core budget if additional funding is not provided by central government. Any changes to the SEN offer in schools / specialist provision which increases cost will need to be funded from savings elsewhere in the DSG.

(B) Capital Costs

Not applicable

Implications of the Proposals:

Resource Implications (Financial, IT, Staffing and Assets): Not applicable
Legal Implications: Not applicable
Equality Implications: There are no equality implications.

Contribution to the Council's Core Purpose:

Protect the most vulnerable: Children with Special Educational Needs and Disabilities (SEND) are considered to be some of the more vulnerable members of our communities.
Facilitate confident and resilient communities:

Agenda Item 4

By improving processes for children with SEND, this will contribute towards the facilitation of more confident and resilient communities.
Commission, broker and provide core services: The Local Authority shares responsibility for children with SEND and has a role in ensuring good quality care and services for them.
Place – leadership and influencer: The Council has a role to play in providing strong leadership and influencing Partners to work towards the provision of good quality care and services which are in the best interests of children with SEND.
Drivers of change and reform: The Council has a role to play in driving improvements for support to children with SEND.
Facilitate sustainable economic prosperity: Good support for children with SEND is more likely to lead to them reaching their maximum potential, which could include improved life chances.
Greater income for social investment: Good support for children with SEND is more likely to lead to them reaching their maximum potential, which could include improved life chances.
Cleaner Greener Not applicable.

What consultations have taken place on the proposals and when?

(A) Internal Consultations

The Head of Corporate Resources (FD.5209/18.....) and Head of Regulation and Compliance (LD.4433/18....) have been consulted and any comments have been incorporated into the report.

(B) External Consultations

A number of external organisations and Providers have been consulted on during the course of the review and these are listed within the Final Report.

Implementation Date for the Decision

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

Contact Officer:	Debbie Campbell
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Email Address:	debbie.campbell@sefton.gov.uk

Appendices:

The following appendices are attached to this report:-

- Final Report of the Special Educational Needs and Disability Process of Assessment Working Group.

Background Papers:

There are no background papers available for inspection.

1. Introduction/Background

- 1.1 At its meeting on 26 September 2017 the Overview and Scrutiny Committee (Children's Services and Safeguarding) established a Working Group to review the topic of Special Educational Needs and Disability Process of Assessment; and the following Members were appointed to serve on the Working Group (Minute No. 23 (4) refers):-

Councillors Murphy, Brenda O'Brien and Spencer;
Co-opted Members Mrs. Sandra Cain, and Ms. Libby Kitt;
Former Councillor Maria Bennett; and
Former Co-opted Member Mrs. Carrie Ryan-Palmer.

- 1.2 Councillor Spencer was appointed as the Lead Member for the review.

- 1.3 Terms of reference for the Working Group were as follows:-

To review the Special Educational Needs and Disability Process of Assessment, in terms of "what it will look like in the future", to include the following aspects:-

- Confidence in mainstream education to support Special Educational Needs; with particular reference to:-
 - Referrals and Assessments;
 - Information provided to parents/carers, particularly on assessment and during the transition to secondary school;
 - SEN provision in schools;
 - Sharing of "good/best practice".

- 1.4 The Final Report is attached for consideration

- 1.5 The Committee is requested to support the recommendations produced by the Working Group and commended them to the Cabinet for approval.

- 1.6 The Cabinet is requested to approve the recommendations.

- 1.7 At its meeting held on 10 July 2018, the Overview and Scrutiny Committee (Children's Services and Safeguarding) considered the Final Report of the Special Educational Needs and Disability Process of Assessment Working Group and supported the recommendations, provided the recommendations were subject to

Agenda Item 4

any budget implications and the inclusion of the revised recommendation 1. (h), to read as follows:-

- “1. (h) Include Frequently Asked Questions (FAQs) for parents/carers of children with SEND within the information available on school admissions, as part of the “school readiness” approach, in order to create an efficient and effective home-school partnership from the outset, in conjunction with the Assessment, Resource and Provision Planning Team;”.

**OVERVIEW AND SCRUTINY COMMITTEE
(Children's Services and Safeguarding)**



**SPECIAL EDUCATIONAL NEEDS AND DISABILITY
PROCESS OF ASSESSMENT
FINAL REPORT JULY 2018**

Overview
& Scrutiny



Overview & Scrutiny



**'Valuing
Improvement'**

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CONTENTS PAGE

Paragraph and Title	Page No.
Lead Member's Introduction	2
Glossary of Terms	3
Background to the Review	4
Membership of Working Group	5
Terms of Reference and Objectives for the Review / Methods of Enquiry	6
Summary of Meetings / Site Visits	7-8
Background Documents	9
Interviewing Key Witnesses	10-11
Key Findings and Conclusions	12-16
Acknowledgements and Thanks	17-18
Recommendations	19-21



Agenda Item 4

Lead Member's Introduction

It gives me great pleasure to submit to you the findings of the investigation in relation to the review on Special Education Needs and Disability - Process of Assessment.

When we started the review we felt that “the child” appears to have been “lost” in the system of assessment used to obtain Education, Health and Care Plans (EHCPs).

We had heard criticisms of certain aspects of the system from parents and carers and we tried very hard for this not to be a piece of work that set about blaming people and organisations. Instead, we met with as many groups and organisations as we could in order to hear their side of the story and to appeal to them to work with us in improving things for the children concerned.

The focus of this review was very much that every parent/carer and their family matters and that any proposed recommendations we came up with should provide outcomes to support and empower parents/carers, allowing them to take back some control over the process.

I would like to thank everyone who took part in interviews and submitted information that helped inform the Working Group. I am grateful to the Working Group Members for their commitment and efforts in looking at this issue. Finally I would like to thank our support officers for their assistance and professional support provided to the Working Group and for producing this final report.

We would like to give a special thank you to Debbie Campbell for going over and above her duties; she has been invaluable in helping us with her knowledge, time and support.



Councillor Paula Spencer
Lead Member,
Overview and Scrutiny Committee
(Children's Services and Safeguarding)



Glossary of Terms

SEN – Special Educational Needs

SEND – Special Educational Needs and Disability

SENCO – Special Educational Needs Co-ordinator. The SENCO is responsible for the day-to-day operation of a school's SEN policy. The SENCO has an important role to play in ensuring that children with SEND within a school receive the support they need. All mainstream schools must appoint a teacher to be their SENCO. The Code of Practice requires that the SENCO must be a qualified teacher and must achieve a National award in Special Educational Needs C-ordination within three years of appointment.

EHCP – Education, Health and Care Plan. The former Statement of SEN, setting out a child's Special Education Needs (educational) and any additional help a child should receive, was replaced by the Education, Health and Care Plan, which sets out educational, health and social needs for a child and also sets out the additional support required to meet those needs.

The Local Offer - A Local Authority's publication of all the provision "they expect to be available across education, health and social care for children and young people in their area who have SEN or are disabled, including those who do not have Education, Health and Care (EHC) plans."



Agenda Item 4

Background to the Review

A joint inspection of the Special Educational Needs and Disability Service had been undertaken by Ofsted and the Care Quality Commission in November 2016, and had examined the local area's effectiveness in the following:-

- The identification of children and young people with SEND;
- Meeting the needs of children and young people with SEND; and
- Improving outcomes for children and young people with SEND.

Following the inspection the Council had been required to submit a written "Statement of Action" on five areas of concerns arising from the findings of the joint inspection, the areas of concern being as follows:-

- Action 1 – the poor progress made from starting points by pupils with a statement of Special Educational Needs or an Education Health and Care Plan at key stages 2 and 4.
- Action 2 – the poor operational oversight of the Designated Clinical Officer across health services in supporting children and young people who have special educational needs and/or disabilities and their families.
- Action 3 – the lack of awareness and understanding of health professionals in terms of their responsibilities and contribution to Education Health and Care Plans.
- Action 4 – the weakness of co-production with parents, and more generally in communications with parents.
- Action 5 – the weakness of joint commissioning in ensuring that there are adequate services to meet local demand.

The Committee requested that a Special Meeting of the Committee be arranged in order that the findings of the Inspection could be considered in more detail along with the draft Improvement Plan addressing the areas of suggested improvement.

Subsequently, a Working Group was established to review the topic of "Special Educational Needs and Disability Process of Assessment".



Membership of Working Group

At its meeting held on 26 September 2017, the Committee resolved as follows (Minute No. 23 refers):-

- “(4) a Working Group be established to review the topic of “Special Educational Needs and Disability Process of Assessment”; and in that respect the following Members be appointed to serve on the Working Group:-

Councillor Spencer, Sandra Cain, Carrie Ryan-Palmer and Libby Kitt;
and

- (5) the Head of Regulation and Compliance be requested to contact those Members who were absent to seek their interest in serving on the Working Group referred to in (4) above.”

Further to Minute No. 23 (5) above, other Members of the Committee were contacted in order to seek their interest in serving on the Working Group and the following Members expressed an interest:-

- Councillor Bennett, Murphy and O’Brien.

This was subsequently reported the Committee at its next meeting on 5 December 2017. In addition although Mrs. Palmer’s appointment to serve on the Committee as a Parent Governor Representative was due to expire, the Committee considered a request put forward by the Chair of the Committee and resolved (Minute No. 34 refers):-

- “(2) the request for Mrs. Palmer to continue to serve on the Special Educational Needs and Disability Process of Assessment Working Group be approved.”

Agenda Item 4

Terms of Reference and Objectives for the Review

The Working Group agreed the following Terms of Reference and Objectives:

To review the Special Educational Needs and Disability Process of Assessment, in terms of “what it will look like in the future”, to include the following aspects:-

- Confidence in mainstream education to support Special Educational Needs; with particular reference to:-
 - Referrals and Assessments;
 - Information provided to parents/carers, particularly on assessment and during the transition to secondary school;
 - SEN provision in schools;
 - Sharing of “good/best practice”.

Methods of Enquiry

- Through the gathering and consideration of data, information and evidence, either from existing sources or through specific Working Group interviews;
- Meeting and talking to parents regarding their experiences;
- Through any necessary site visits, e.g. schools; and
- SEN Improvement Plan (background document).



Summary of Meetings / Site Visits

A summary of Working Group meetings and activities undertaken during the course of the review are set out below:-

Date of Meeting	Activity
5 January 2018	Scoping of review. Discussion of issues.
26 January 2018	Consideration of background documents. Discussion of issues.
16 March 2018	Discussion of issues.
20 April 2018	Interview of witness – the Council’s Senior Educational Psychologist. Consideration of information on school nurses.
18 May 2018	Consideration of information from the Sefton Parent Carer Forum. Interview of witnesses – the Council’s Consultant in Public Health, Assistant Director (Clinical), North West Boroughs and a representative of the School Nursing Service, to discuss the School Nursing Service. Consideration of information on the numbers of children with special educational needs.
25 May 2018	Interview of witnesses – a representative of Sefton Clinical Commissioning Groups and two Service Managers, Community Therapies, Alder Hey Children’s NHS Foundation Trust, to discuss difficulties encountered by parents/carers with appointments with professional experts. Interview of witness – the Council’s Head of Inclusion.
22 June 2018	Consideration of key findings/conclusions and formulation of recommendations.

Agenda Item 4

In addition, Working Group Members undertook site visits to view facilities for Special Educational Needs and to discuss arrangements for children with SENs at the following schools:-

Date	Site Visit
28 February 2018	Meols Cop High School, Southport Birkdale High School.
2 March 2018	Our Lady Star of the Sea Catholic Primary School, Seaforth Rimrose Hope Church of England Primary School, Seaforth.



Background Documents

Working Group Members considered the following documents during the course of their review:-

1. Procedure / Process - Education, Health and Care Assessment and Plans (EHC)
2. Special Educational Needs and Disability Code of Practice: 0 to 25 Years
3. Special Educational Needs and Disability Service - Update on the Implementation of Actions arising from the Joint Inspection with OFSTED and CQC.
4. Figures - Trends for Sefton EHCP
5. Legal Position for the Council - Legal Authority Duties
6. NICE guidelines and the role of Educational Psychologists
7. Information received from Healthwatch Sefton regarding the SENs agenda and feedback obtained from parents/carers.
8. Service Specification for the 0-19 Healthy Child Programme for Sefton
9. The SEN2 (2018) Form – numbers of children with Special Educational Needs
10. Information received from the Sefton Parent Carer Forum.



Agenda Item 4

Interviewing Key Witnesses

Staff and parents/carers of Meols Cop High School;

Staff and parents/carers of Birkdale High School;

Staff and parents/carers of Our Lady Star of the Sea Catholic Primary School;

Staff of Rimrose Hope Church of England Primary School;

Working Group Members visited the schools above to meet with staff, parents, and in some cases, governors, to discuss SEND provision within the schools and to discuss experiences of parents/carers of children with SEND.

Senior Educational Psychologist

Working Group Members met with the Senior Educational Psychologist for discussions and to ask questions regarding the work of the Council's Educational Psychologists.

Sefton Parent Carer Forum

Working Group Members attended a meeting of the Sefton Parent Carer Forum to hear about issues raised by parents/carers of children with SEND.

Working Group Members also requested a meeting with representatives of the Sefton Parent Carer Forum for discussions and to ask questions regarding parents' and carers' experiences of special educational needs, particularly in schools. Unfortunately, due to unforeseen circumstances, representatives of the Forum were unable to attend the meeting. However, they did submit a very comprehensive document setting out the most important issues for families with SEND in Sefton.

Public Health

Working Group Members met with the Council's Consultant in Public Health for discussions and to ask questions regarding commissioning for school nurses.

North West Boroughs Healthcare Foundation Trust

Working Group Members met with a representative of North West Boroughs Healthcare Foundation Trust for discussions and to ask questions regarding the School Nursing Service as the Trust provides the Service in Sefton.

Representatives of the School Nursing Service

Working Group Members met with a representative of the School Nursing Service for discussions and to ask questions regarding service provision within schools.



Clinical Commissioning Groups

Working Group Members met with a representative of the Sefton Clinical Commissioning Groups for discussions and to ask questions regarding assessment appointments by professionals. These assessments are then used to formulate Education, Health and Care Plans (EHC Plans) for the child with SEND.

Alder Hey Children's NHS Foundation Trust

Working Group Members met with two Service Managers, Community Therapies, of the Trust, to discuss assessment appointments by professionals, as the Trust provides these services in Sefton.

Inclusion Service

Working Group Members met with the Council's Head of Inclusion for discussions and to ask questions regarding SEND from an inclusion perspective.

Team Leader, Resource & Provision, EIP Family Support

Throughout the course of the review, Working Group Members were advised by the Council's Team Leader, Resource & Provision, EIP Family Support, on the procedures and processes involved for children with SEND, including the Education, Health and Care Assessment and Plans (EHCPs)

Agenda Item 4

Key Findings and Conclusions

The following paragraphs have been numbered to correlate with the recommendations, in order for the reader to find the rationale behind the recommendations more easily.

- 1 (a) Resource/SEN units within schools have been in place for some time and some are in need of a re-vamp. Having held discussions with schools, parents/carers, etc. some doubts were held by Working Group Members regarding whether the right provision is currently available within the right schools and whether they are meeting the needs of children and their families appropriately. Members were advised that the current SEN provision has not been reviewed for some time and they considered that a review should be requested.
- 1 (b) Throughout the course of the review Members of the Working Group, together with parents/carers of children with SEND, expressed dislike for the term “SEN unit” and considered that it had acquired negative connotations that did not foster inclusivity for the children who use those units. This could be seen to disadvantage users within mainstream education. Members considered that a different expression, such as schools describing themselves as “SEN friendly schools” could be seen to be a more inclusive description and should be explored and encouraged.
- 1 (c) During the site visits undertaken to schools, parents/carers of children with SEND, particularly those children with autism, reported that assessment appointments could be disruptive and unsettling for children. Members of the Working Group heard that on more than one occasion, this has been compounded when professionals had cancelled appointments, sometimes at the last minute. The Lead Member had personal experience of this herself. Working Group Members considered that wherever possible, assessment appointments by professional experts could be carried out within schools in order to provide a “safe” environment for the child, with less preparation required for those children who dislike having their routine being disrupted. School Nurses representatives and SENCOs interviewed by the Working Group were supportive of this proposal. The proposal was also raised with representatives of the Clinical Commissioning Groups and of Alder Hey Children’s NHS Foundation Trust who were not opposed to the idea, in principle. This proposal would require discussions with relevant Partner organisations.
- 1 (d) The site visits undertaken to both primary and secondary schools highlighted different practices being adopted by schools with regard to SENCOs. Some schools have a dedicated non-teaching SENCO, whilst others choose to have SENCOs combined with a teaching role. Working Group Members considered that some excellent practice is being undertaken in certain schools with a dedicated SENCO. Where schools have a SEN unit, Members considered that schools ought to be encouraged to have a dedicated SENCO, particularly where there is a high proportion of children with SEND.



- 1 (e) The Council's Senior Educational Psychologist considered that the best SENCOs were those who on the management structure of the school concerned as they were able to have an overview of the school and be able to challenge other staff, if necessary. Working Group Members considered that all relevant schools should be encouraged to include SENCOs on the management team, in order to raise and enhance the profile of SEND.
- 1 (f) Throughout the course of the review, a number of reports were made by parents/carers and some schools that delays in referral of children with SENs for professional assessment were occurring in obtaining Education, Health and Care Plans. The lack of a dedicated school nurse was cited as one reason as sometimes delays occurred in waiting for input from School Nurses on conditions. One school SENCO in particular was undertaking referrals of children herself, in order to minimise delays. Members of the Working Group considered that this good practice could be extended to other schools and that all SENCOs could be encouraged to undertake this role. The School Nurse representatives consulted with were also supportive of this proposal.
- 1 (g) When Working Group Members met with the Council's Senior Educational Psychologist, discussion took place on the possibility of the Educational Psychologists providing training on SENs for parents/carers' groups within schools and Working Group Members requested whether the provision of joint training of parents/carers, together with teachers could be explored. It was considered that this joint training would support the work of the SENCO. The Senior Educational Psychologist was supportive of this proposal.
- 1 (h) Transition was considered to be a very important time, particularly for parents/carers of children with SEND and appropriate information was not always readily available at that time. Working Group Members considered that information could be made available within the Transition booklet, in order for it to be readily available to all parents/carers, which would ensure inclusivity. With regard to publicity, Members considered that information needed to be provided to everyone, with blanket targeting of all children, rather than just targeting those children considered to require it. Members also considered that the inclusion of Frequently Asked Questions (FAQs) for parents/carers of children with SEND could also be included within the Transition booklet and that this could increase "school readiness". These approaches would ensure inclusivity for all.
- 1 (i) When Working Group Members undertook site visits to schools, parents/carers of children with SEND reported that they had not always been in receipt of the information they required, particularly from an early years' perspective. This had caused some concerns and delays in ensuring that children were "school ready". Working Group Members acknowledged the important role of the Borough's Family Wellbeing Centres and considered that increased information for parents on SEND could be communicated through the Centres. This would maximise "school readiness" for both children and parent/carers.

Agenda Item 4

- 1 (j) In considering information available, Members of the Working Group considered that information on SEND could be included with or within the Personal Child Health Record, which is known as the “red book”. Members felt that such information, readily available from an early age, could assist parents/carers with early interventions for children with SEND. This proposal would require discussions with relevant Partner organisations.
- 1 (k) During site visits undertaken to schools, parents/carers of children with SEND felt that they were not always in receipt of the information they required. Working Group Members considered that schools could utilise their newsletters more fully in order to include potentially useful contacts and useful events on SEND.
- 1 (l) The site visits undertaken highlighted some excellent practice being undertaken within certain schools. One primary school in particular was undertaking neuro-diversity education with all its pupils in relation to SEND. Working Group Members considered that this best practice could be shared with primary schools, in order to encourage tolerance and understanding in future generations and assist in changing the culture towards SEND. This would also increase inclusivity within primary schools.
- 1 (m) During the course of the review concerns were raised that not enough was being done to highlight the availability of Sefton’s Local Offer. During the site visits made to schools, at least one parent of a child with SEND was not aware of it. Working Group Members considered that this was a “gap” in the main route into the SEND service and that the Local Plan could be revised in order to make it more user-friendly and accessible to parents/carers. Although the information is currently present on the Council’s web-site, Members considered that it was not particularly easy to find and that it could possibly be highlighted on the “home page” of the “Schools and Learning” information. Members also considered that the language used within the Local Offer is not particularly “user-friendly” and probably not quite appropriate. A glossary of terms and abbreviations used would also be helpful.
- 1 (n) (i) When Members of the Working Group attended a meeting of the Sefton Parent Carer Forum, they heard a number of parents report that they did not see the School Nurse. Members subsequently met and raised this point with representatives of the School Nursing Service and it was considered that more could probably be done by schools to promote the drop-in sessions for School Nurses within schools, including utilisation of the school newsletters. Such promotion would increase opportunities for parents/carers to access the drop-in sessions.
- 1 (n) (ii) During one site visit to a particular school, the SENCO considered that lack of access to a dedicated School Nurse was causing delays in preparing documentation to obtain EHC Plans. This matter was discussed when Working Group Members subsequently met with



representatives of the School Nursing Service. On enquiry, it became clear that this was not the case and that the role of School Nurses was misunderstood. Representatives of the School Nursing Service indicated that they would be supportive of approaching the Sefton SENCO Forum, with a view to clarifying their role. This would minimise delays in obtaining EHC Plans. This proposal would require discussions with relevant Partner organisations.

- 1 (o) (i) During the course of the review and at the site visits to schools in particular, some schools and parents/carers considered that some high schools are deliberately restricting the number of enhanced transitions relating to SEND, due to the cost implications involved. Working Group Members considered that the Overview and Scrutiny Committee (Children's Services and Safeguarding) could request a report investigating this matter further, together with any reasons for the restrictions.
 - 1 (o) (ii) During the course of the review and at the site visits to schools in particular, some instances emerged of children with SEND accessing Sefton schools from outside the Borough, particularly due to some of the excellent practices being undertaken within certain Sefton schools. Working Group Members considered that information on this could be incorporated within the report referred to in 1 (o) (i) above.
 - 1 (o) (iii) During the course of the review and at the site visits to schools in particular, it became apparent that there are a small number of parents who have children with SEND and who are not actively engaging with schools. Working Group Members considered that consideration could be given as to how these parents could be engaged, or re-engaged, and information on this could be incorporated within the report referred to in 1 (o) (i) above.
 - 1 (o) (iv) During the course of the review and at the site visits to schools in particular, some parents reported that support had been withdrawn for their child during Year 6 at primary level and that this had not been helpful for the child's progress. This could cause issues with transition, academic progress and integration for children and support had to be re-sought at high school. Working Group Members considered that investigations could be undertaken to ascertain reasons for the withdrawal for funding and information on this could be incorporated within the report referred to in 1 (o) (i) above.
2. Throughout the course of the review, a number of reports were made by parents/carers and some schools about delays occurring in the process of obtaining Education, Health and Care Plans due to children not being referred quickly. The lack of a dedicated school nurse was cited as one reason as sometimes delays occurred in waiting for input from School Nurses on conditions. Working Group Members met with School Nurse representatives and found that all schools within the Borough receive the services of a School

Agenda Item 4

Nurse, with only one or two exceptions. Nevertheless, Members considered that it was important to remind both the School Nurse and the school SENCO of the need to collaborate, in order to minimise delays in undertaking assessments and referrals of children and in obtaining EHC Plans for them.

3. Members of the Working Group were conscious that the SENDs agenda ran from age 0-25. There was not time, however, to examine post-19 provision for SEND, although concerns were held regarding this age bracket. Members considered that the Overview and Scrutiny Committee could consider the establishment of a further Working Group to examine post-19 provision and that this could be a Joint Working Group with the Overview and Scrutiny Committee (Regeneration and Skills).
4. All Overview and Scrutiny final reports include a recommendation for a monitoring report on the progress of implementation of recommendations to be submitted back to the relevant Overview and Scrutiny Committee after six months, as a matter of course. In accordance with this practice, Members of the Working Group agreed that a request should be made for a six monthly monitoring report to be submitted to the Overview and Scrutiny Committee (Children's Services and Safeguarding), setting out progress made against each of the recommendations submitted by the Working Group. Members were also keen for the monitoring report to be measured against SMART objectives (Specific, Measurable, Achievable, Results-focussed, and Time-bound).



Acknowledgements and Thanks

In producing this report on Special Educational Needs and Disability Process of Assessment, acknowledgements and thanks are attributed to the following individuals and organisations for their time and input:-

- *The Council's Senior Educational Psychologist;*
- *The Sefton Parent Carer Forum;*
- *The Council's Consultant in Public Health;*
- *North West Boroughs Healthcare Foundation Trust;*
- *The School Nursing Service*
- *The Sefton Clinical Commissioning Groups;*
- *Alder Hey Children's NHS Foundation Trust*
- *The Council's Head of Inclusion;*
- *The staff and parents of Meols Cop High School;*
- *The staff and parents of Birkdale High School;*
- *The staff and parents of Our Lady Star of the Sea Catholic Primary School;*
- *The staff of Rimrose Hope Church of England Primary School;*
- *Jacqui Kerr, Team Leader, Resource & Provision, EIP Family Support;*
and
- *Debbie Campbell, Senior Democratic Services Officer.*



Agenda Item 4

Thanks must also go to the Members of the Working Group who have worked hard and dedicated a great deal of time to this review, namely:-

Councillor Paula Spencer (Lead Member)
Former Councillor Maria Bennett
Councillor Paula Murphy
Councillor Brenda O'Brien
Co-opted Member Mrs Sandra Cain
Co-opted Member Ms. Libby Kitt
Former Co-opted Member Mrs Carrie Ryan-Palmer



Recommendations

1. That the Head of Schools and Families be requested to:-
 - (a) Review the current provision of Special Educational Needs (SEN) units within schools, in order to ensure that appropriate provision is available within the relevant schools, as evidence provided suggests that the current system is not meeting the needs of children and their families appropriately.
 - (b) Encourage relevant schools to consider an alternative term for “SEN unit”, possibly describing themselves as a “SEN-friendly school”, in order to reduce stigma and improve compliance with the Equality Act.
 - (c) Liaise with the Sefton Clinical Commissioning Groups and Alder Hey Children’s NHS Foundation Trust in order to explore the possibility of requesting assessment appointments by professional experts to be carried out in schools wherever possible, particularly specialised schools and those schools with a unit, in order to provide a “safe” environment for children, with less preparation required for those children who experience anxiety when their routine is disrupted.
 - (d) Encourage those schools that have a SEN unit to have a dedicated Special Educational Needs Co-ordinator (SENCO), particularly where there are a high proportion of children with SEND, as evidence provided indicates that access to appropriate resources is greater in settings where there is a dedicated SENCO.
 - (e) Encourage schools to include SENCOs on the management team for the school, in order to enhance the profile of SEND.
 - (f) Encourage schools to support SENCOs to undertake referrals of children with SEND for professional input and assessment appointments, in order to minimise delays in obtaining Education, Health and Care Plans (EHCPs).
 - (g) Explore the possibility, in conjunction with the Council’s Senior Educational Psychologist, of encouraging schools to undertake joint training on SEND for parents/carers’ groups within schools, with teachers and governors, in order to ensure that the information and approach provided are consistent, appropriate embedded
 - (h) Consider the possibility, in conjunction with the Assessment, Resource and Provision Planning Team, of including Frequently Asked Questions (FAQs) for parents/carers of children with SEND within the information available on school admissions, as part of the “school readiness” approach, in order to create an efficient and effective home-school partnership from the outset.

Agenda Item 4

- (i) Explore the possibility of increasing communication with parents/carers on SEND through the Borough's Family Wellbeing Centres, particularly from an early years' perspective and possibly through the development of leaflets, in order to enhance "school readiness" for the children and their parents/carers.
- (j) Liaise with the Sefton Clinical Commissioning Groups to explore the possibility of requesting that information on SEND for parents/carers is included with/within the Personal Child Health Record (red book) and through the Healthy Child Programme, in order to assist in early intervention.
- (k) Encourage schools to include potentially useful contacts and useful events on SEND within school newsletters, in order to ensure that all parents/carers have access to them.
- (l) Encourage primary schools to share good practice and to consider undertaking inclusivity education with all children, particularly relating to SEND and neuro-diversity, in order to raise standards and ensure equitable and universal access to provision within schools.
- (m) Revise Sefton's Local Offer in order to make it more user-friendly and accessible to parents/carers, which could include ensuring that it is easier to find on the Council's web-site, using less formal language and the inclusion of a glossary of terms and abbreviations.
- (n) Liaise with the Council's Head of Health and Wellbeing in order to:
 - (i) Encourage schools to advertise and promote the School Nurse drop-in sessions within their newsletters, so that parents/carers have a greater opportunity to access them.
 - (ii) Request the School Nursing Service to approach the SENCO Forum, with a view to discussing the Healthy Schools Programme and to clarify the role of the School Nurse, particularly in relation to assessing children with SEND and in order to minimise delays in obtaining EHC Plans, as this would help to manage the expectations of parents/carers.
- (o) Submit a report to a future meeting of the Overview and Scrutiny Committee (Children's Services and Safeguarding), following an audit, providing information on the following:-
 - (i) Any high schools which are restricting the number of enhanced transitions for SEND, together with explanations for the reasons behind the decisions.
 - (ii) The number of children with SEND accessing Sefton schools who come from outside the Borough and the reasons for this.



- (iii) Consideration of how parents who have children with SEND and who are not engaging with schools could be engaged, or re-engaged.
 - (iv) Whether funding has been withdrawn for children with SEND in Year 6 and the reasons for withdrawal.
- 2. That the Head of Health and Wellbeing be requested to ensure that the School Nurse carries out their role prior to any collaboration with the school SENCO, in relation to assessing and referring children with SEND, in order to minimise delays in obtaining EHC Plans.
- 3. That the Overview and Scrutiny Committee (Children's Services and Safeguarding) be requested to consider the establishment of a Working Group in the future to examine post-19 provision for SENDs, in order to improve conditions for this vulnerable group of young people. This could be a Joint Working Group with the Overview and Scrutiny Committee (Regeneration and Skills).
- 4. That the Senior Democratic Services Officer be requested to liaise with relevant officers in order to ensure that the Overview and Scrutiny Committee (Children's Services and Safeguarding) receives a six-monthly monitoring report, setting out progress made against each of the recommendations outlined above and as a means of ensuring SMART objectives.

Agenda Item 4

Overview & Scrutiny



For further information please contact:-

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Sefton Council 



Agenda Item 5

Report to:	Overview and Scrutiny Committee (Regeneration and Skills) Cabinet	Date of Meeting:	Tuesday 3 July 2018 Thursday 26 July 2018
Subject:	Parks and Greenspaces Final Report		
Report of:	Head of Regulation and Compliance	Wards Affected:	(All Wards);
Portfolio:	Cabinet Member – Health and Wellbeing		
Is this a Key Decision:	No	Included in Forward Plan:	No Please delete as appropriate and remove this text.
Exempt / Confidential Report:	No		

Summary:

To submit the findings of the Overview and Scrutiny Parks and Greenspaces Working Group to the Overview and Scrutiny Committee (Regeneration and Skills) for approval and to commend to the Cabinet.

Recommendation(s):

That the Overview and Scrutiny Committee commend the following report with recommendations for Cabinet approval.

(1)	That consideration and further research continues to take place on future service delivery mechanisms for the newly forming 'Green Sefton' service. These, together with other day to day innovations, to seek to reduce the reliance on the service on revenue budgets whilst still providing sites that communities value, feel safe in, and remain freely accessible;
(2)	That the Head of Communities in consultation with Corporate Communications be requested to investigate the possibility of a Sefton Parks and Greenspaces application for electronic devices to enable visually impaired individuals to safely and confidently navigate around Sefton's Parks and Greenspaces, encouraging individuals to visit parks and greenspaces;
(3)	That the Head of Communities be requested to continue exploring and developing food growing projects, such as communal allotments in parks;

Agenda Item 5

(4)	That the Head of Communities be requested to continue exploring and developing the volunteer hubs, such as that at Botanic gardens old nursery site;
(5)	That the Head of Communities be requested to continue to arrange 'Volunteer Celebrations' and offer thanks formally to all volunteers who contribute so much to our Parks and Greenspaces; and
(6)	That the Head of Communities be requested to report annually or when appropriate, whichever is the sooner, to the Overview and Scrutiny Committee updating the Committee on progress

Reasons for the Recommendation(s):

The Working Group has made a number of recommendations that require approval by the Cabinet.

Alternative Options Considered and Rejected: (including any Risk Implications)

No alternative options were considered. The Overview and Scrutiny Committee (Regeneration and Skills) established a Working Group to review Parks and Greenspaces in Sefton and the Working Group has performed this task.

What will it cost and how will it be financed?

There are no additional costs other than investigating the possibility of an electronic application for the visually impaired in order that they may navigate safely around Sefton's Parks. It is anticipated these initial costs will be negligible and can be met from existing revenue budget. Once the work has been conducted, the findings, including potential costs of viable options, will be subject of an additional report

(A) Revenue Costs

– met from existing resources

(B) Capital Costs

– Not applicable

Implications of the Proposals:

Resource Implications (Financial, IT, Staffing and Assets):
--

Legal Implications:
Equality Implications:
The inclusion of an electronic application would help the visually impaired in navigating safely around Sefton’s Parks.

Contribution to the Council’s Core Purpose:

Protect the most vulnerable: The inclusion of an electronic application would help the visually impaired in navigating safely around Sefton’s Parks.
Facilitate confident and resilient communities: As above
Commission, broker and provide core services: N/A
Place – leadership and influencer: N/A
Drivers of change and reform: N/A
Facilitate sustainable economic prosperity: N/A
Greater income for social investment: N/A
Cleaner Greener N/A

What consultations have taken place on the proposals and when?

(A) Internal Consultations

The Head of Corporate Resources (FD 5171/18) has been consulted and notes any initial costs can be met from existing resources. The Head of Regulation and Compliance (LD 4395/18.....) has been consulted and any comments have been incorporated into the report.

Implementation Date for the Decision

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

Agenda Item 5

Contact Officer:	Ruth Harrison
Telephone Number:	Tel: 0151 934 2042
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Appendices:

The Final Report of the Parks and Greenspaces is attached to this report

Background Papers:

There are no background papers available for inspection.

1. Introduction/Background

1.1 The Final Report is attached for consideration.

1.2 The Overview and Scrutiny Committee (Regeneration and Skills) is requested to commend the report and its recommendations to the Cabinet for approval.

**OVERVIEW AND SCRUTINY COMMITTEE
(REGENERATION AND SKILLS)**

**PARKS AND GREENSPACES WORKING GROUP
FINAL REPORT
APRIL 2018**

Overview
& Scrutiny



Overview & Scrutiny



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LEAD MEMBER'S INTRODUCTION

I am very pleased to introduce this Overview and Scrutiny Committee (Regeneration and Skills) Parks and Greenspaces Working Group report.

I wish to thank all those people who gave up their valuable time to take part in the Working Group's review as their input and expertise greatly helped the Working Group in the formulation of its recommendations. Finally, I am extremely grateful to my fellow cross-party Working Group Members for their commitment and their ideas and contributions.



Councillor Harry Bliss,
Lead Member, Parks and Greenspaces
Working Group

Agenda Item 5

1.0 BACKGROUND

- 1.1 At its meeting held on 20 September 2016 the Overview and Scrutiny Committee (Regeneration and Skills) approved the establishment of a Working Group to review Parks and Greenspaces.
- 1.2 Councillors Bliss, Roche, Webster and Bill Welsh were appointed to serve on the Working Group.
- 1.3 Councillor Bliss was appointed Lead Member. Details of Working Group meetings are set out below:-

Date	Activity
28.11.16	Scoping Document approved Better Places, Greener Spaces – the Future Management of Parks and Greenspaces document considered
12.12.16	Gathering Information
30.01.17	Site visits undertaken to parks and greenspaces across the borough
31.07.17	Meeting to discuss and consider the outcome of the public consultation process and the proposed revision to the Draft Strategy

2.0 TERMS OF REFERENCE AND OBJECTIVES

- 2.1 The Terms of Reference and Objectives of the Working Group were approved as part of the scoping exercise at the first meeting and are set out below.
- 2.2 Terms of Reference and Objectives
 - 2.2.1 Review the General Reduction in Standards' saving proposal for 2015-17, and the evolved draft 'Better Places, Greener Spaces - Future Management Parks and Greenspaces' document
 - 2.2.2 To support and/ or challenge this and make recommendations as appropriate to improve the proposed strategic approach and its resulting resource allocation and future changes to service delivery
 - 2.2.3 To undertake annual reviews of the impact of the approach once enacted in order to track the impact of changes to service and react/ make recommendations accordingly

3.0 METHODS OF ENQUIRY

- 3.1 Individual Discussions
- 3.2 Group discussions and presentations to the Working Group
- 3.3 Observation of consultation sessions, and techniques to be undertaken with the wider community



3.4	Review the outcome of the consultation exercise on completion
3.5	<p>Option to:</p> <ul style="list-style-type: none"> • Review of wider background documents that reflect the current position of parks management and make recommendations for future delivery of parks in the UK: eg the ongoing central government inquiry into public parks, documents from the Landscape Institute, Natural England, the Heritage Lottery Fund, NESTA, APSE etc • Undertake site visits within the borough • Undertake site visits nearby authorities
4.0	<p>BACKGROUND</p> <p>The Parks and Greenspace Service is the largest land management service in the borough. With over 160 sites, covering circa 788 ha, some of which are high profile tourist destinations, others are local or neighbourhood sites still valued by their local communities. They all have a complex range of facilities and features including living plant material, small animals, buildings, lakes, play areas, footpaths, walls, sports features etc.</p> <p>The Parks and Greenspace Service provides a one stop shop to estimated 12M visitors per year, providing full land management and development, including community and volunteer opportunities.</p>
5.0	<p>PARKS AND GREENSPACE SERVICE – AN OVERVIEW</p>
5.1	<p>Parks and Green Spaces</p> <ul style="list-style-type: none"> • Over 160 individual sites – including regional or local visitor destinations such as Botanic Gardens, Hesketh Park and Kings Gardens, Crosby Coastal Park Play Area, Derby Park. • Total area of 788 ha of land managed. • Historic and/ or listed structures such as conservatory, observatory, fernery, bandstands, and other monuments. • Buildings including parks lodges, community buildings, sports changing rooms, nursey greenhouses and much more. • Lakes, water features and fountains, including bridges and other structures. • Estimated 12M visits/year.

Agenda Item 5

5.2	Play and Exercise Facilities <ul style="list-style-type: none">• Mostly within parks but some stand-alone;• 55 play grounds• 34 outdoor gyms• 3 skate parks• 13 multi-use games area
5.3	Outdoor Sports and Recreational Facilities <ul style="list-style-type: none">• 2 Golf Courses• 18 Bowling Greens• 46 Sports pitches for example: football, rugby, baseball)• 25 Tennis courts
5.4	Allotments <ul style="list-style-type: none">• Approximately 1,100 plots over 14 sites
5.5	Trees <ul style="list-style-type: none">• Circa 30,000 Street trees managed on behalf of Highways• Circa 60,000 trees in parks• 24 hour call-out emergencies
5.6	Service delivery mechanisms and Contracts <ul style="list-style-type: none">• Grounds Maintenance function (insourced April 2017) which carries out all day to day tasks for managing parks, e.g. litter, grass, shrubs, sports pitches, bowling greens, floral bedding etc.• Tree Management contract for all trees in parks and on the highway e.g. pruning, felling and pro-active maintenance.• Term contract and ad hoc small contracts for hard infrastructure repairs and improvements (eg surfacing, play equipment, railings and boundaries)• Capital works contracts for improvement schemes – budgets ranging from a few thousand upwards often to several hundred thousand pounds.



<p>5.7</p>	<p>User Management and Community Development in Parks</p> <ul style="list-style-type: none"> • Support for Friends of Park Groups and other associated community groups (currently 36 supported) • Promotion and development of volunteer work in parks; (there has been an increase in volunteer hours in Sefton’s parks by 1100% since 2008/9, to 22,000 hours in 2014/15 – valued at circa £315,000) • Development of partnership and “organisational” volunteering. • Promotion of park activities to encourage increased and better use of parks; 900 in 14/15, attended by circa 120,000 people, (mostly run by others but facilitated by ourselves) • Liaison with other agencies to promote community safety and reduce anti-social behaviour • Pro-actively work with schools and young people and provision of diversionary activities • Enforcement of by-laws e.g. dog-fouling, dog control, litter
<p>5.8</p>	<p>Other Activities</p> <ul style="list-style-type: none"> • Seek funding, design and deliver capital projects to develop our sites (over £11M over the last ten years) • Seek sponsorship and other external funding to contribute to the service • Advise the Planning Department on Landscape issues relating to planning applications, and the development of corporate of corporate land based strategies (the Local Plan, Greenspace Strategy, Open Space Study, Pitch Study and Non Pitch Study) • Manage concessionaires on our sites • Manage health and safety and deal with insurance claims relating to our land
<p>5.9</p>	<p>Benchmarking and Quality Awards</p> <ul style="list-style-type: none"> • Green Apple award – international award for environmental best practise • ASAP Service Team of the year finalist 2009 and 2011 (Association of Public Sector Excellence) • Gold Standard national play award (Royal Society of Prevention of Accidents)

Agenda Item 5

	<ul style="list-style-type: none">• Winners of 7 Green Flag awards (national standard for parks management)• Consecutive success in “In Bloom” competition since 1993 both at regional and national level. Southport in Bloom won the Large Coastal Resort category for national finals of Britain in Bloom for 2016, and all five town entries found success in the North West in Bloom awards• Facilitated 3 community groups to enter Community Green Flag awards• Facilitated 35 community groups to enter Neighbourhood In Bloom awards



6.0	CONCLUSIONS
6.1	The Council provides a rich network of parks and greenspaces which are diverse in their designs and meet differing needs within our communities.
6.2	<p>Parks and Greenspaces provide many benefits:</p> <ul style="list-style-type: none"> • A valuable space for families to bond away from the distractions of technology; • A shared local space, where a range of groups and clubs will establish and congregate to create strong local bonds; • Ideal for fitness and training and encourage local residents to adopt a more healthy, outdoor lifestyle; • Increased tourism as a destination for a day out for outdoor fun, often free or at little cost; • Local Identity as a natural meeting point and event stage; • Increased footfall meaning local business could benefit from increased residual custom; • Widely regarded as key to improving the mental health of local residents; • Provide a constructive environment for older children and young adults; and • Provide an important role in the development of social and fine motor skills in young children, as well as encouraging an active lifestyle.
6.2	Community volunteering has made a massive contribution to the Parks and Greenspace.
6.3	<p>In recent years there has been a great focus on development of volunteering opportunities in parks. This can range from volunteer gardening such as planting, weeding, pruning etc, to assisting with infrastructure such as repairing and painting benches, railings etc, to offering guided walks, to simply being an ‘eyes and ears’ volunteer to report issues about the parks.</p> <p>The Working Group highlighted the importance and excellent work undertaken by volunteers and hoped to see this developed further in the future.</p>
6.4	Members of the Working Group agreed that the way Parks and Greenspaces are managed needs to change and flex with the demands of the Council, in the context of reducing revenue budgets, but still contributing towards the 2030 vision.
6.5	It was also noted, based on research on trends in parks management from across the country, that other options for the future of the service can be explored also. These can include alternative service delivery mechanisms, such a ‘Parks Trust’ being explored by Knowsley Council, the trialling of Parks



Agenda Item 5

	Improvement Districts, crowdfunding, commercialising some of the services we are able to offer to other land owners, selling arisings from land management such as timber, hay and potentially developing a tree and shrub nursery etc
6.7	It should also be noted that since this working party began its work, Full Council agreed to the integration of the Parks and Greenspace Service, the Coast and Countryside Service, and the Flood and Coastal Erosion Risk Management Team (March 2017). With the insourcing of the Grounds Maintenance function in 2017 too, the potential for the newly evolving 'Green Sefton' Service is an excellent opportunity for the council to deliver these land management functions in very different ways.
6.8	A fundamental conclusion is that parks play a valuable part in people's lives, that they create a sense of place for communities and that meeting health and safety obligations must always be paramount. Further it was concluded that access to general parks facilities should remain freely accessible to all (but that some specific facilities, for select segments of users (and not for the wider public) could still be charged for).



7.0	RECOMMENDATIONS
7.1	That consideration and further research continues to take place on future service delivery mechanisms for the newly forming 'Green Sefton' service. These, together with other day to day innovations, to seek to reduce the reliance on the service on revenue budgets whilst still providing sites that communities value, feel safe in, and remain freely accessible;
7.2	That the Head of Communities in consultation with Corporate Communications be requested to investigate the possibility of a Sefton Parks and Greenspaces application for electronic devices to enable visually impaired individuals to safely and confidently navigate around Sefton's Parks and Greenspaces, encouraging individuals to visit parks and greenspaces;
7.3	That the Head of Communities be requested to continue exploring and developing food growing projects, such as communal allotments in parks;
7.4	That the Head of Communities be requested to continue exploring and developing the volunteer hubs, such as that at Botanic gardens old nursery site;
7.5	That the Head of Communities be requested to continue to arrange 'Volunteer Celebrations' and offer thanks formally to all volunteers who contribute so much to our Parks and Greenspaces; and
7.6	That the Head of Communities be requested to report annually or when appropriate, whichever is the sooner, to the Overview and Scrutiny Committee updating the Committee on progress in relation to recommendations 7.1 to 7.5, above.

Agenda Item 5

Thanks must also go to the Members of the Working Group who have worked hard and dedicated a great deal of time to this review, namely:-



Councillor Harry Bliss, Lead Member,
Parks and Greenspaces Working Group



Councillor Michael Roche



Councillor Veronica Webster



Councillor Bill Welsh

For further information please contact:-



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Sefton Council 

**Overview
& Scrutiny**



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Agenda Item 6

Report to:	Cabinet	Date of Meeting:	26 July 2018
Subject:	Approval of Legal Documentation for Academy Conversions		
Report of:	Head of Schools and Families	Wards Affected:	All
Cabinet Portfolio:	Children, Schools and Safeguarding		
Is this a Key Decision:	Yes	Included in Forward Plan:	Yes
Exempt / Confidential Report:	No		

Summary:

To inform Cabinet that on 24th May 2018, the Regional Schools Commissioner has issued an academy order to enable Kew Woods Primary School to convert to an academy. The governing body of Churchtown Primary School has also informed the Local Authority of their application to convert to an academy. Authorisation is requested for officers to sign the documentation required by the Government's academy conversion process at the appropriate time.

Recommendation(s):

Cabinet is recommended to:

- (1) Note the statutory requirements regarding academy conversion.
- (2) Note the financial implications to the Council.
- (3) Authorise the Head of Schools and Families in consultation with the relevant Officers to complete the necessary agreements required as part of the academy conversion process for the following schools as outlined in the report: Kew Woods Primary School and Churchtown Primary School.

Reasons for the Recommendation(s):

Cabinet needs to authorise appropriate officers to enter into the agreements required as part of the academy conversion process.

Alternative Options Considered and Rejected: (including any Risk Implications)

There are no alternative options. The Secretary of State has the powers to direct that the academy conversion process can continue if the agreements are not signed.

What will it cost and how will it be financed?

(A) Revenue Costs

Agenda Item 6

The Council is required to pick up any deficit balance of a maintained schools becoming part of a sponsored Academy Trust at the point of conversion. For schools converting on a voluntary basis, such deficits are picked up by the DfE. Any surplus balances are passed over to the new Academy after all agreed residual costs have been charged and the accounts are formally closed as a Maintained school. This may be up to 4 months after the conversion date.

There may be some loss of traded income to the Council as a result of schools converting to academies, but this cannot be quantified at this stage, since many services continue to remain available for purchase by these Academies should they wish to buy them.

There will also be a financial loss of NNDR Business Rates income to the Council as a result of any academy conversions by maintained schools as academy schools are eligible to claim the mandatory 80% business rate relief

(B) Capital Costs

Not Applicable.

Implications of the Proposals:

Resource Implications (Financial, IT, Staffing and Assets):

Upon conversion to an Academy, staff within the schools will transfer under Transfer of Undertakings Protection of Employment Regulations 2006 to the new academy.

Legal Implications:

The conversion of schools to academies is a statutory process under the Academies Act 2010 (the Act)

The governing bodies of Kew Woods Primary School and Churchtown Primary School have applied for an order under section 3 of the Act. The Orders provide that on the conversion date, the school shall become an academy and will cease to be maintained by the Local Authority.

The Council have a statutory duty to facilitate the conversion process once an academy order has been made.

The principal issues in relation to conversion are: transfer of Staff; transfer of land and transfer of Assets and Contracts. These issues will be addressed in two documents:- a Commercial Transfer Agreement and a Lease Agreement.

Equality Implications:

There are no equality implications.

Contribution to the Council's Core Purpose:

Not applicable

What consultations have taken place on the proposals and when?

(A) Internal Consultations

The Head of Corporate Resources (FD 5173/18) and Head of Regulation and Compliance (LD 4397/18) have been consulted and any comments have been incorporated into the report.

(B) External Consultations

The schools are required to consult with parents, staff and trade unions as part of the academy conversion process.

Implementation Date for the Decision

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

Contact Officer:	Mike McSorley
Telephone Number:	0151 934 3428
Email Address:	Mike.mcsorley@sefton.gov.uk

Appendices:

There are no appendices to this report

Background Papers:

There are no background papers available for inspection.

Agenda Item 6

1. Introduction/Background

- 1.1 The governing bodies of Kew Woods Primary School and Churchtown Primary School have applied to become academies. The Secretary of State has approved the academy order for Kew Woods. At the time of drafting the report the application for Churchtown was being considered but there is no reason to believe it will not be approved.

2. Academy Conversion Process

- 2.1 The process for schools converting to academies is legislated under the Academies Act 2010 which states that the Secretary of State may make an Academy order in respect of a maintained school in England if the school is eligible for intervention (within the meaning of Part 4 of EIA 2006) or the governing body of a school can make an application to become an academy under section 3 of the Act. The academisation process covers the following main areas:

Land Issues

- 2.2 The Academies Act 2010 contains specific powers for the Secretary of State in respect of the land of the schools when they were maintained schools. It is intended that the transfer of publicly funded land owned by the local authority to the academy will usually be by way of a 125-year lease.
- 2.3 A lease will be drawn up to comply with the above requirements and to ensure there are no undue risks to the Authority and that any usagerights at the time of conversion are preserved. The lease transfers the responsibility for the operation and management of the land and buildings to the Academy Trust.

Commercial Transfer Agreement

- 2.4 This document is designed to ensure that all information on the staff who are transferring to the academy is recorded and transferred to the Academy Trust, so that the appropriate arrangements for payment of salaries, pension contributions, etc. can be made. It also includes details of any assets or contracts that will transfer to the Academy Trust and of those that will not.
- 2.5 Commercial Transfer Agreements, which are agreements between the school governing body, the local authority and the academy trust will be drawn up. Officers will ensure that all appropriate responsibilities and liabilities are transferred to the Academy Trust to ensure there are no undue risks to the Authority.

Assignment or novation of contracts

- 2.6 This forms part of the Commercial Transfer Agreement and covers agreements and contractual arrangements which will need to transfer to the Academy Trust.
- 2.7 Specific contract and arrangements in respect of the converting school have been identified.

TUPE Process

- 2.8 TUPE consultation will be undertaken as part of the process and this is discussed at regular meetings with the Trade Unions.
- 2.9 By virtue of TUPE, there is a legal obligation to provide written information about the transfer to employee representatives. The information which the current employer must give in writing to employee representatives (which will be union representatives in where a trade union is recognised in respect of the relevant category of staff) is as follows:
- (a) The fact that the transfer is to take place, when and why;
 - (b) The “legal, economic and social implications” of the transfer for the affected employees;
 - (c) The “measures” which the employer envisages it will take in connection with the transfer or, if no measures are envisaged, that fact; and
 - (d) Any measures which the employer envisages the Academy Trust taking in connection with the transfer in respect of the transferring employees or, if no measures are envisaged, that fact.
- 2.10 By virtue of TUPE terms and conditions should be protected. The contractual documentation should address this and should ensure Sefton obtain appropriate warranties and indemnities. Pension issues should also be addressed.

3. Financial Implications

- 3.1 There will be some financial implications to the Council as a result of these Academy conversions. The Council will lose approximately £64,550 of Business Rates income, in a full year, due to both schools receiving mandatory 80% rate relief after converting to academy status. The Council currently has a number of traded \ statutory services that the schools buy into some of which may be at risk going forward after the schools convert.
- 3.2 For sponsored academies, the Local Authority must finalise closing balances within 4 months of the date of conversion and the Local Authority must pay over any surplus balances due to the school within 1 month of agreeing their final accounts. Should no agreement be reached on the final balances the DFE can be asked to review the position within this 1 month period. In the event of a deficit balance position any deficit at the point of transfer remains the responsibility of the Local Authority and does not have to be paid by the new Academy Trust.
- 3.3 The governing bodies of the following schools have all applied to become converter academies and will join an existing Academy Trust.

Kew Woods Primary School

The current Budget Plan approved by the Governing Body of Kew Woods Primary School shows projected balance of £67,650 at the 31st March 2018. The draft budget plan for 2018/19 shows projected balances of £70,080 at the 13th March

Agenda Item 6

2019 however if the school converts before the 31st March 2019 then the school balances at the point of transfer may be higher.

Churchtown Primary School

The current Budget Plan approved by the Governing Body of Churchtown Primary School shows an outturn balance position of £361,594 at 31st March 2018. The approved budget plan for 2018/19 shows projected school balances of £380,996 at the 31st March 2019 however if the school converts before the 31st March 2019 then the school balances at the point of transfer may be higher.

- 3.5 For Converter Academies, the Local Authority must finalise closing balances within 4 months of the date of conversion. If the agreed closing balance is a surplus, the Local Authority must pay over any surplus balances due to the school within 1 month of agreeing their final accounts. Should no agreement be reached on the final balances the DFE can be asked to review the position within this 1 month period. In the event of a deficit, the Local Authority would be reimbursed by the EFA, and agreement would then be reached between the new Academy and the EFA as to how this could be repaid.
- 3.6 It is possible that there may also be a loss of traded income. Academies are at liberty to purchase a range of services from whichever supplier they choose. The schools currently purchase a range of services from the Local Authority as traded services. Due to the organisation of Academies, many of whom operate in a sponsorship arrangement, such services may be provided by the sponsor. At this stage, it is not known which, if any, services the new Academies may buy back, but this could be a further loss of income to the Council.

4. Timetable

- 4.1 A date for conversion has not yet been agreed.

Agenda Item 7

Report to:	Cabinet	Date of meeting:	26 July 2018
Subject:	Sand Dunes Nursery School – proposal to commence statutory consultation		
Report of:	Head of Schools & Families	Wards Affected:	Linacre and neighbouring wards where pupils reside
Is this a Key Decision:	Yes	Included in Forward Plan:	No – Rule 27
Exempt / Confidential Report:	No		

Summary

The Governing body of Sand Dunes Nursery School have written to the local authority stating that they are unable to set a budget and are unable to produce a plan which will bring the school back into budget. They are no longer financially viable and have therefore requested that the local authority commence a statutory consultation on a proposal to close the school.

The purpose is to provide background information relating to Sand Dunes Nursery School and to seek approval for the commencement of the statutory consultation process on a proposal to close the school.

Recommendation(s):

Cabinet are recommended to:

- 1) Note the request from the Governing Body of Sand Dunes Nursery School of Schools to undertake a statutory consultation on a proposal to close the school because it is no longer financially.
- 2) Note the statutory process outlined in the report for the closure of the school:
- 3) Approve the commencement of the statutory consultation process relating to the proposal to close Sand Dunes Nursery School with effect from July 2019.
- 4) Note that the proposal was a Key Decision but had not been included in the Council's Forward Plan of Key Decisions. Consequently, the Leader of the Council and the Chair of the Overview and Scrutiny Committee (Children's Services and Safeguarding) had been consulted under Rule 27 of the Access to Information Procedure Rules of the Constitution, to the decision being made by Cabinet as a matter of urgency on the basis that it was morally important to ensure parents were aware of the proposal before the start of next academic year.

Agenda Item 7

Reasons for the Recommendation(s):

The local authority has the statutory power to close a maintained school following the statutory process detailed in the report.

Alternative Options Considered and Rejected: (including any Risk Implications)

All alternative options have been explored by the governing body with support from Officers prior to the governing body making their request.

What will it cost and how will it be financed?

(A) Revenue Costs

Any budget shortfall by the end of the closure period is the responsibility of the Council and cannot be charged to the Dedicated Schools Grant (DSG). Therefore the Council will need to identify additional resources from its reserves and balances to support the final closing deficit position. The funding implications of this are detailed in the body of the report.

Any mothballing costs related to the building may be met from specific funding within the DSG which is held centrally for this purpose. However this funding is under review by the DfE as part of the national review of school funding and may not be available after 31st March 2020.

(B) Capital Costs

N/A

Implications of the Proposals:

Resource Implications (Financial, IT, Staffing and Assets):

As part of the consultation process meetings will be held with staff in the school and their trade union representatives

Legal Implications:

The consultation on the proposal to close the school will be carried out in accordance with the requirements of the School Organisation (Establishment and Discontinuance of Schools) Regulations 2013.

Equality Implications:

There are no equality implications.

Contribution to the Council's Core Purpose:

Protect the most vulnerable:

Facilitate confident and resilient communities:

Commission, broker and provide core services:
Place – leadership and influencer:
Drivers of change and reform:
Facilitate sustainable economic prosperity
Greater income for social investment:
Cleaner Greener:

What consultations have taken place on the proposals and when?

(A) Internal Consultations

The Head of Corporate Resources (FD.5218/18) and Head of Regulation and Compliance (LD.4442/18) have been consulted and any comments have been incorporated into the report.

(B) External Consultations

Public consultation on the proposal will take place in accordance with statutory requirements

Implementation Date for the Decision

Immediately following the expiry of the “call-in” period for the Minutes of the Cabinet meeting

Contact Officer:	Mike McSorley
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Appendices:

None

Background Papers:

There are no background papers available for inspection.

Agenda Item 7

1. **Background**

- 1.1 Sand Dunes Nursery has had financial challenges for a number of years but the head teacher and governing body have been able to restructure and reorganise the school to ensure that the school's budget was balanced. Unfortunately, because of increasing costs and static pupil numbers they are no longer able to set a balanced budget. The school is currently only half full and numbers are unlikely to increase.
- 1.2 Members may recall that during the consultation on children and family centres a number of issues were raised about the current numbers of children attending Seaforth Nursery School and its consequential impact and viability of the Centre.
- 1.3 Governing Bodies have a duty to set a balanced budget each year and the Governing Body of Sand Dunes Nursery School has worked very hard over the last few years to reduce costs and set a balanced budget. This has been against a backdrop of a funding freeze, falling pupil numbers and increasing cost.
- 1.4 The Governing Body of Sand Dunes Nursery School met on 26 June 2018 to consider the financial position of the school going forward in the light of no foreseeable increase in pupil numbers and increasing cost. The Governing Body consider that they could not reduce costs to the level required to set a balanced budget due to statutory requirements around staff/pupil ratios. Following this meeting the Chair of Governors wrote to the Head of Schools and Families on 27 June saying, "as a Governing body we cannot by law set a deficit budget and at a full Governors' meeting on 26th June it was agreed that there was no alternative but write to yourself stating that the school is no longer financially viable and asking you to consider undertaking a consultation on proposed closure." A copy of the letter from the school is attached to this report.

2. **Financial Position**

- 2.1 Sand Dunes Nursery School has been struggling financially for a number of years and the Governing Body has worked hard to reduce costs and set a balanced budget.
- 2.2 The table below summarises the financial position of the school over the last two years and the projected financial position for 2018/19 to 2019/2.

Year	2016/17	2017/18	2018/19	2019/20
		**		
Total Expenditure	230,039	403,508	392,876	439,441
Total Funding	203,079	239,341	232,794	232,794
Budget surplus / deficit	-26,960	-164,167	-160,082	-206,647
Balances / deficit B'fwd	54,620	27,660	-136,507	-296,589
Est. Balances / deficit C'fwd	27,660	-136,507	-296,589	-503,236

** includes provision of the 2 year old offer from 1st April 2017 following staffing restructure and the closing of the child care provision in the Nursery School in March 2017

- 2.3 As stated above the Governing Body has worked hard to reduce costs each year. However, even with savings in expenditure, the school has had to use all of the schools balances to and still closed last financial year with a deficit.
- 2.4 The current financial position indicates that the school is currently overspending by approximately £160,000 a year and has now exhausted its available balances. The projected financial position for 2018/19 is a deficit of £296,000.
- 2.5 The Governing Body has considered all options and are not able to address the increasing deficit and bring the budget back into a balanced position. As a result, Sand Dunes Nursery School is not financially viable.

3. Standards

- 3.1 Sand Dunes Nursery School was rated as good at its last Ofsted inspection. The majority of other settings in the area are also rated good or outstanding (100% of maintained nursery places and 97% of PVI Daycare).

4. Pupil Places

- 4.1 Sand Dunes Nursery School is approximately 50% full (at the time of writing, 35 children against a capacity of 78 places). There is capacity in other settings in the local area (Based on the January 2018 sufficiency survey there are 29% vacant places in maintained nurseries and 31% in PVI Daycare).

5. Statutory process and outline timescale

- 5.1 Local authorities are under a statutory duty to ensure that there are sufficient school places in their area, promote high educational standards, ensure fair access to educational opportunity and promote the fulfilment of every child's educational potential. To help them meet these duties and restructure local provision they have the power to close all categories of maintained schools.
- 5.2 The statutory process for closing a school has five stages:

Agenda Item 7

Stage 1	Consultation	No prescribed timescale (minimum of 6 weeks recommended; school holidays should be taken into consideration and avoided where possible). Likely to be no longer than 12 months.
Stage 2	Publication	1 day
Stage 3	Representation	Must be 4 weeks (this is prescribed in legislation and cannot be shortened or lengthened).
Stage 4	Decision	LA should decide a proposal within 2 months otherwise it will fall to the Schools Adjudicator. Where permitted appeals must be made within 4 weeks of the decision.
Stage 5	Implementation	No prescribed timescale – but must be as specified in the published notice, subject to any modifications agreed by the decision-maker.

5.3 Under section 16(3) of the Education and Inspections Act 2006 a proposer of a school closure must have regard to any guidance issued by the Secretary of State. The Secretary of State considers that those bodies listed below should be consulted in the case of the proposed closure of schools:

- LA (as appropriate);
- parents of pupils;
- where the LA is a county council the local district or parish council where the school that is the subject to the proposal is situated;
- in the case of a special school – any LA which maintains a statement of special educational needs in respect of a registered pupil at the school.
- the Governing Body (as appropriate);
- pupils at the school;
- (if a proposal involves, or is likely to affect a school which has a particular religious character) the appropriate diocese or relevant faith group;
- the trustees of the school (if any);
- teachers and other staff at the school;
- any LA likely to be affected by the proposal, in particular neighbouring authorities where there may be significant cross-border movement of pupils;
- the governing bodies, teachers and other staff of any other school that may be affected;
- parents of any pupils at other schools who may be affected by the proposal including where appropriate families of pupils at feeder primary schools;

- any trade unions who represent staff at the school; and representatives of any trade union of staff at other schools who may be affected by the proposal;
- MPs whose constituencies include the school that is the subject of the proposal or whose constituents are likely to be affected by the proposal; and
- any other interested body/person that the proposer thinks is appropriate.

5.5 The consultation will consist of meetings with staff, governors and families and provide the opportunity for discussion and written representation. Following the consultation Members will receive a report which will consider the outcome of the consultation as well as detail on pupil numbers and admissions, arrangements for pupils from the closing school, community impact, impact on denominational provision and any implications for adjacent schools.

6. Consultation Proposal

- 6.1 Given the financial position of the school the consultation proposal will be to close the school from July 2019. The closing school deficit budget is predicted to be - £365,000. If the school were to close at Easter the deficit would be -£296,000 but children in the upper year would need move to a new setting for a term before they started in reception in the September which may be detrimental to their development. Although it would reduce the deficit if the school were to close early it is felt that an early closure would have a detrimental impact on children attending the nursery and it is suggested that closure should be from July 2019.
- 6.2 The two closing deficit budget positions above are both based on current staffing and running costs and a continued take up of current 2 year old and 3 and 4 year old nursery places. If as a result of the consultation the number of nursery places drop then the financial deficit in each case could be higher. There will also be closure costs that will need to be factored into the final deficit position but these are unknown at this time and so cannot be quantified.
- 6.3 The consultation process will enable all stakeholders to express their views but it is important to begin the process as soon as possible so that parents and families (particularly those due to begin at the school in September) are made aware and can consider their options prior to the start of the new academic year.

Agenda Item 7

SEFTON CHILDREN'S SERVICES



Sand Dunes
Nursery School
41 Caradoc Road
Seaforth L21 4NB

Headteacher Hayley Stoba

27th June 2018

Dear Mr McSorley,

Re: Sand Dunes Nursery School

It is with regret that I am writing to you to ask the Council to start a statutory consultation proposing the closure of Sand Dunes Nursery School. I believe, for the reasons I will outline below, that it is in the interests of the children and parents of the school that such a consultation be started as soon as possible.

As a Governing body and school community we have worked hard to reduce costs and continue to provide high quality early years support to our children and families. Some of our community are amongst the most vulnerable families in Sefton and support often goes well beyond just providing a nursery school place for their children. However, we are now at a stage where, despite all of this hard work over the last few years, the school is in a deficit budget position and we cannot set a balanced budget in 2018/19, nor can we come up with a plan to reduce costs to within the budget provided through the funding formula going forward.

The Governors fully recognise their core function to oversee the financial performance of the school and to ensure best use of resources and have worked with the Local Authority over the past four years to ensure that a balanced budget was achieved. There has been a reduction in this estimated deficit through the hard work of the Head and school staff; however, we believe that we cannot make any further significant financial savings to reduce the predicted budget deficit of nearly £300,000 at the end of the 2018/19 financial year.

As a Governing body we cannot by law set a deficit budget and at a full Governors' meeting on 26th June it was agreed that there was no alternative but write to yourself stating that the school is no longer financially viable and asking you to consider undertaking a consultation on proposed closure.

It goes without saying that should the Council commence the consultation I have requested, you will have the full co-operation of the Governing body during that consultation.

We would want to work closely with the local authority to ensure a smooth transition for our children and families to alternative provision and would ask that the local authority puts measures in place to support staff who may be at risk of redundancy to find alternative employment.

Yours sincerely,
Jane Dunn
(Chair of Governors, Sand Dunes Nursery)



Agenda Item 8

Report to:	Cabinet	Date of Meeting:	26 July 2018
Subject:	Approval of Pro Forma for Sustainable Drainage Systems document, Guidance notes and SuDs and Flood Risk Information Note		
Report of:	Head of Locality Services - Commissioned	Wards Affected:	(All Wards);
Portfolio:	Cabinet Member - Locality Services		
Is this a Key Decision:	Yes	Included in Forward Plan:	Yes
Exempt Confidential Report:	/ No		

Summary:

Approval is sought to use the Sustainable Drainage & Flood Risk Information Note and the Flood Risk Pro Forma to support Development Management, which relate to the implementation of Local Plan policy EQ8 'Flood risk and surface water'. These documents will clarify and simplify the process for developers and staff. They will be a material consideration in assessing planning applications.

Recommendation(s):

- (1) Approve the Sustainable Drainage Systems and Flood Risk Information Note for Development Management purposes; and
- (2) Approve the Flood Risk Pro Forma for Development Management purposes

Reasons for the Recommendation(s):

Provide clarity of requirements and the expectations of the Local Planning Authority in Sefton to developers with regard to Sustainable Drainage Systems and flood risk requirements, whilst improving the efficiency of the service provided to support development management.

Alternative Options Considered and Rejected: (including any Risk Implications)

Not to develop these supplementary methods to support the Council in assessing planning applications in relation to sustainable drainage and flooding would have kept a process with a number of inefficiencies.

What will it cost and how will it be financed?

Agenda Item 8

(A) Revenue Costs

Contained within existing revenue budgets

(B) Capital Costs

n/a

Implications of the Proposals:

Resource Implications (Financial, IT, Staffing and Assets): There are no additional resource implications.
Legal Implications: There are no legal implications.
Equality Implications: There are no equality implications.

Contribution to the Council's Core Purpose:

Protect the most vulnerable:
Facilitate confident and resilient communities:
Commission, broker and provide core services: Improve the clarity and efficiency of the service provided by the Planning Authority to developers.
Place – leadership and influencer:
Drivers of change and reform:
Facilitate sustainable economic prosperity:
Greater income for social investment:
Cleaner Greener

What consultations have taken place on the proposals and when?

(A) Internal Consultations

The Head of Corporate Resources (FD5205/18) has been consulted and notes the report indicates no direct financial implications for the Council. The Head of Regulation and Compliance (LD4429/18) has been consulted and any comments have been incorporated into the report.

(B) External Consultations

Regarding the Pro Forma, consultation has involved the Merseyside Flood Risk Coordinator and discussions have been had at the Merseyside Tactical Flood Risk Partnership about undertaking a similar approach across Merseyside.

Consultation on the scope of the Sustainable Drainage Systems and Flood Risk Information Note took place in summer 2017, and comments received were considered in the preparation of the Information Note. Informal stakeholder consultation has taken place with the Environment Agency extensively, United Utilities and more recently MEAS. Public consultation was undertaken during Spring 2018 for the Sustainable Drainage and Flood Risk Information Notes, alongside consultation on various draft Supplementary Planning Documents. The comments received were taken into account and where appropriate amendments were made, as set out in summary of comments and the Council's response which can be found on www.sefton.gov.uk/newsdpd.

Implementation Date for the Decision

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

(Please delete as appropriate and remove this text)

Contact Officer:	Paul Wisse
Telephone Number:	Tel: 0151 934 2959
Email Address:	paul.wisse@sefton.gov.uk

Background Papers:

The following background papers, which are not available elsewhere on the Internet can be accessed on the Council website:

Cabinet Member - Planning and Building Control decision to allow public consultation on information notes:

Batch 1 <http://smbc-modgov-01/ieDecisionDetails.aspx?ID=10479>

Batch 2 <http://smbc-modgov-01/ieDecisionDetails.aspx?ID=10480>

Sustainable Drainage and Flood Risk Information Note

Flood Risk Pro Forma and guidance note

Summary of comments made during consultation on the Sustainable Drainage and Flood risk Information Notes and the Council's response to these

[https://www.sefton.gov.uk/planning-building-control/planning-policy-including-local-plan-and-neighbourhood-planning/sustainable-drainage-systems-\(suds\)-and-flood-risk-information-notes.aspx](https://www.sefton.gov.uk/planning-building-control/planning-policy-including-local-plan-and-neighbourhood-planning/sustainable-drainage-systems-(suds)-and-flood-risk-information-notes.aspx)

Agenda Item 8

1. Introduction/Background

- 1.1 Sefton Council as a Local Planning Authority assesses planning applications against the Sefton Local Plan (adopted 2017), which is set in the context of the National Planning Policy Framework (NPPF) and national planning practice guidance. Within this framework the Planning Authority must consult with the Lead Local Flood Authority (Sefton Council's Flood Risk management Service) on major planning applications (10+ properties or >1ha) to provide comment on the flood risk and surface water management.
- 1.2 Sefton's Local Plan goes further than the NPPF with regard to flood risk through the overall Policy EQ8 and a number of site specific policies. As a result the Lead Local Flood Authority is consulted on developments of 5 or more properties or sites of 0.5ha or more across most of Sefton.

2 Flood Risk Pro Formas

- 2.1 It is a common occurrence that not all of the flood risk and surface water drainage information is provided timely or collectively, this introduces delays and inefficiencies into the planning application assessment process.
- 2.2 The purpose of the Pro Formas are to pull together local (Sefton's Local Plan) and national (National Planning Policy Framework) requirements concerning flood risk and drainage into one document, to be completed by the applicant and submitted with a major planning application, to minimise problems of information not being supplied.
- 2.3 The first Pro Forma sets out what should be investigated and provided by an applicant as the bare minimum when submitting a planning application. This is to ensure that all applications have sufficient information for the Lead Local Flood Authority to assess and provide comments, without the need for objecting on the grounds of insufficient information provided.
- 2.4 The second Pro Forma sets out the information the applicant must supply to discharge conditions.
- 2.5 The guidance document, 'Completing your Pro Forma, is to assist applicants or developers with additional advice and information in order to complete the Pro Forma – this includes reference to the policy framework. It sets out the Lead Local Flood Authority's technical requirements for sustainable drainage (previously covered in part of the Information Notes). The Local Planning Authority have been consulted through the preparation process for these documents.
- 2.6 The documents referred to in 2.3, 2.4, 2.5 and 3.1 can be viewed by following this link.

[https://www.sefton.gov.uk/planning-building-control/planning-policy-including-local-plan-and-neighbourhood-planning/sustainable-drainage-systems-\(suds\)-and-flood-risk-information-notes.aspx](https://www.sefton.gov.uk/planning-building-control/planning-policy-including-local-plan-and-neighbourhood-planning/sustainable-drainage-systems-(suds)-and-flood-risk-information-notes.aspx)

3 Sustainable Drainage (SuDS) and Flood Risk Information note

- 3.1 The aim of the Information Note is to provide clear guidance to developers, agents and others in relation to policy EQ8 'Flood risk and surface water' in the Sefton Local Planning, the National Planning Policy Framework and existing Environment Agency and national planning guidance. This includes information and the Council's expectations on flood risk generally, including river and tidal flooding, and not increasing the risk of flooding elsewhere. The Information Note also includes information about related measures to manage, and where possible reduce, surface water generally. This links to the role of the Lead Local Flood Authority, which has been consulted through the Information Note preparation process.
- 3.2 While a series of draft Information Notes on separate topics were consulted on, these have now been consolidated into one, revised, Information Note. The revision reflects comments made during the consultation, the fact that some technical information is now in the Pro Forma and the associated Guidance note, and the on-going input of the Lead Local Flood Authority. In particular, the sequential and exception tests have now been simplified in relation to surface water flood risk to reflect national guidance more closely. Comments were received from Historic England ('no comment'), Natural England, Network Rail, Persimmon Homes Lancashire, Lancashire Branch and its Sefton District Group of the Campaign to Protect Rural England, Taylor Wimpey UK Ltd and United Utilities. A summary of these comments and the Council's responses is available alongside the Information Note on www.sefton.gov.uk/newspd.

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Agenda Item 9

Report to:	Cabinet	Date of Meeting:	26 July 2018
Subject:	Revenue Budget Outturn 2017/18		
Report of:	Head of Corporate Resources	Wards Affected:	(All Wards);
Portfolio:	Cabinet Member - Regulatory, Compliance and Corporate Services		
Is this a Key Decision:	No	Included in Forward Plan:	Yes
Exempt / Confidential Report:	No		

Summary:

To inform Cabinet of the revenue outturn position in relation to the 2017/18 financial year. In doing so the report will outline any key variations and where appropriate any impact on future years' financial performance.

Recommendation(s):

Cabinet is recommended to: -

1. Note the General Fund net surplus of £1.923m for 2017/18 that will be held in order to support any significant budget variations that may arise in the final two years of the Council's current three year budget (up to 2019/20); and,
2. Note the Schools Delegated Budget net surplus of £1.577m for 2017/18.

Reasons for the Recommendation(s):

The production of a revenue outturn report is a key feature of effective financial management and will allow Members to make informed decisions that will support service delivery and medium term financial sustainability.

Alternative Options Considered and Rejected: (including any Risk Implications)

N/A

What will it cost and how will it be financed?

Agenda Item 9

(A) Revenue Costs

All financial implications are reflected within the report

(B) Capital Costs

All financial implications are reflected within the report

Implications of the Proposals:

Resource Implications (Financial, IT, Staffing and Assets): None
Legal Implications: None
Equality Implications: None

Contribution to the Council's Core Purpose:

Effective Financial Management and the development and delivery of sustainable annual budgets support each theme of the Councils Core Purpose.

Protect the most vulnerable:
Facilitate confident and resilient communities:
Commission, broker and provide core services:
Place – leadership and influencer:
Drivers of change and reform:
Facilitate sustainable economic prosperity:
Greater income for social investment:
Cleaner Greener

What consultations have taken place on the proposals and when?

(A) Internal Consultations

The Head of Corporate Resources is the author of the report (FD5221/18)

The Head of Regulation and Compliance has been consulted and any comments have been incorporated into the report (LD 4445/18).

(B) External Consultations

N/A

Implementation Date for the Decision

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

Contact Officer:	Paul Reilly
Telephone Number:	Tel: 0151 934 4106
Email Address:	paul.reilly@sefton.gov.uk

Appendices:

There are no appendices to this report

Background Papers:

There are no background papers available for inspection.

Agenda Item 9

1. Introduction

- 1.1 The report details the revenue outturn position for the financial year 2017/18 and provides details of the major variations within that position for the General Fund and Schools' Delegated Budgets. Cabinet have previously received the capital outturn report for 2017/18 and this report should be read in conjunction with that document that was presented in June 2018.

2 General Fund Revenue Outturn 2017/18

- 2.1 The Council has completed the closure of the Authority's Accounts for 2017/18 and submitted the Statement of Accounts to Ernst & Young for audit. The timeframe for the overall closure of accounts process is as follows:

- Draft Statement of Accounts produced – 31 May 2018
- Audit & Governance Committee receive draft accounts – 27 June 2018
- External Audit Review – Planned completion 13 July 2018
- Audit and Governance Committee receive Final Accounts- 25 July 2018

It should be noted that from 2017/18 it is a requirement that the draft Statement of Accounts must be completed by 31 May (previously 30 June) with the audit completed and final Statement of Accounts published by 31 July (previously 30 September), hence the accelerated timeline for this closure of accounts process, which the Council is on target to deliver.

- 2.2 The outturn figures for 2017/18 are explained in more detail in section 3 but can be summarised as follows:

	<u>Budget</u>	<u>Actual</u>	<u>Variance</u>
	<u>£m</u>	<u>£m</u>	<u>£m</u>
<u>Net Revenue Expenditure</u>			
<u>Services</u>			
Strategic Management	3.110	3.134	0.024
Strategic Support Unit	3.758	3.626	-0.132
Adult Social Care	85.656	85.650	-0.006
Children's Social Care	27.225	28.774	1.549
Communities	10.248	9.872	-0.376
Corporate Resources	5.365	4.932	-0.433
Health and Wellbeing	23.257	22.993	-0.264
Inward Investment and Employment	2.562	2.565	0.003
Locality Services - Commissioned	18.336	18.232	-0.104
Locality Services - Provision	9.640	11.610	1.970
Regeneration and Housing	4.465	4.217	-0.248
Regulation and Compliance	3.655	3.480	-0.175
Schools and Families	25.096	25.487	0.391

Other Services	3.250	3.229	-0.021
<u>Total Service Net Expenditure</u>	225.623	227.801	2.178
Reversal of Capital Charges	-13.376	-13.376	-
Corporate Items	-4.792	-5.306	-0.514
Levies	31.555	31.555	-
Parish Precepts	0.921	0.921	-
<u>Total Net Expenditure</u>	239.931	241.595	1.664
Financed by:			
Council Tax Payers	-120.770	-120.770	-
Business Rates Top-Up	-21.575	-22.504	-0.929
Retained Business Rates	-61.760	-61.760	-
General Government Grants	-34.932	-37.590	-2.658
<u>Total Financing</u>	-239.037	-242.624	-3.587
<u>Amount Funded from General Balances</u>	0.894	-1.029	-1.923

3 **General Fund Revenue Outturn 2017/18 – Variation Analysis**

- 3.1 As shown in section 2, the outturn for 2017/18 shows that there was a transfer to General Balances of £1.029m as opposed to the use of General Balances of £0.894m that was budgeted for. This related to the approval at Cabinet in July 2017 for the 2016/17 surplus to be added to the Council's Redundancy Reserve. This reflects service expenditure exceeding the approved budget by £2.178m, however, with a surplus of £4.101m on the Council's corporate budgets and financing an increase in balances has been achieved and an overall surplus delivered.
- 3.2 As would be expected, during the financial year, there has been a number of significant variations in individual services. The major variances are highlighted in the following paragraphs: -
- 3.2.1 **Strategic Support Unit** - The net surplus on these services totalled £0.132m. This is mainly due to staffing savings achieved by not recruiting to vacant posts and reduced staff hours.
- 3.2.2 **Adult Social Care** – The outturn position for the Adult Social Care service showed a net surplus of £0.006m. Although the overall position for the service was in line with the budget there were a number of significant variations within the service as outlined below:
- The employee budget was in surplus by £1.167m due to staff turnover and savings due to vacancies being held during the year.

Agenda Item 9

- A surplus of £0.630m was generated on Specialist Transport expenditure due to a combination of new contract prices and the progression of the Day Care modernisation programme.
- Capitalisation of Community Equipment expenditure, totalling £0.306m, freed up revenue resources to assist with service pressures
- The Community Care budget was in a deficit position of £2.238m due to additional demand and cost pressures during the year.

3.2.3 **Children's Social Care** - Children's Social Care overspent in 2017/18 by £1.549m. This level of overspend was forecast consistently through the year. Major variations included overspending of £2.279m on Placements and Packages. This budget is demand led and as such particularly volatile depending on the increasing numbers of children becoming looked after and where they are placed. There were also particular pressures on Residential Agency Placements, with an over spend of +£1.025m. The overspend position on placements and packages was partially offset however, by the general level of vacancies held across the service, which generated a surplus of around -£0.818m. There was a restructure of the service that took place on the 1st October. The effect of this restructure is that a number of vacant posts have now been fully recruited to, and full year savings have been taken for public sector reform schemes and identified specific service savings.

3.2.4 **Communities**- the outturn position for Communities in 2017/18 was a net surplus of -£0.376m. This consisted of a number of key variations:

- Youth Services and Youth Offending Team staff vacancy savings and running expenses -£0.163m;
- Neighbourhoods had a surplus of -£0.153m due to staff vacancies and additional external income;

3.2.5 **Corporate Resources** – The surplus of £0.433m for Corporate Resources primarily relates to savings made against staffing budgets which is due to posts being held vacant in order to contribute to the overall budget pressures faced by the Council; the service was also successful in delivering an overachievement against its income targets.

3.2.6 **Health & Wellbeing** – A net surplus of £0.264m was brought about primarily due to a Public Health surplus of £0.318m was achieved as a result of the Substance Misuse contract being recommissioned and a surplus on residential rehabilitation service being made which is a demand led service.

3.2.7 **Locality Services - Commissioned** – There was an overall surplus of £0.104m on this service. The final outturn position was aided by surpluses on Landscape Services (£0.053m) and Coastal Services (£0.069m). Due to adverse weather conditions the Winter Maintenance service overspent by £0.308m. However, this was offset by increased Network Management income.

3.2.8 Locality Services - Provision – The service ended the year a deficit of £1.970m. Although Catering Services was in surplus by £0.105m (largely as a result of a successful trading year with schools), there were also a number of reported deficits including Cleansing (£0.807m) Security Services (£0.609m), Burials (£0.232m) and Building Cleaning (£0.183m). The issues affecting these services were as follows:

- The Cleansing service deficit is partially due to reduced income due to adverse weather conditions (e.g. for green waste) and the undertaking of additional works across the Borough.
- The deficit within the Security Service was caused mainly by insufficient income being generated to offset all of the short-term fixed costs of the operation. A restructuring of the service to address the issue has been delayed leading to additional staff costs above that expected.
- The financial performance of the Burials service has been compromised by a reduction in the number of cremations. This is partly due to the completion of a private cremation facility in Burscough and partly due to a reduced capacity at Thornton Garden of Rest whilst works were being undertaken to replace cremators and improve facilities. Whilst the facility at Burscough will continue to provide some competition this pressure should be lessened in future years with the council's facility being fully operational.
- The Building Cleaning overspend of £0.183m was mainly as a result of delays to the restructure of the service to achieve a PSR saving of £0.250m.

Due to the size and diverse nature of this overspend a full base budget review has been undertaken to reduce the inherent budget issue. However it is estimated that residual budget pressure of at least £0.5m remains in 2018/19. This area of the Council's budget will be the subject of robust financial management and monitoring during the year to confirm the deliverability of remedial actions and this will be reported to members

3.2.9 Regeneration & Housing - A net surplus of £0.248m was generated as a result of:

- A reduction in staffing expenditure £0.070m due to vacancies and receipt of funding for employees services.
- Improved income and funding £0.176m, received for planning and building control activities.

3.2.10 Regulation & Compliance - A net surplus of £0.175m was generated due to:

- Increase in cost of governance due to LCR allowances now being funded by Sefton (£0.033m).
- Improved income of £0.283m in relation to car parks.
- Additional staffing costs on Corporate Legal Services.

Agenda Item 9

3.2.11 **Schools & Families** - Schools and Families overspent in 2017/18 by £0.391m. This consisted of a number of key variations:

- Specialist Transport over spent by £1.024m. This was offset by a surplus on the School Readiness Commissioned services and staff vacancy savings - £0.192m;
- A surplus on School Improvement through additional traded income and vacancy savings of -£0.164m;
- SEN Inclusion and Psychology service staff vacancy savings -£0.064m;

3.2.12 **Corporate Items:** A net surplus of £4.101m was brought through the following:

- Debt Repayment / Net Investment – Members will recall that Cabinet / Council previously approved an amendment to the Treasury Management Strategy with regard to Minimum Revenue Provision for debt repayment. The impact of this in 2017/18 was an additional reduction in cost of £0.663m.
- As part of the Sefton's participation in the Liverpool City Region 100% Business Rates Pilot some of the S31 grants / top-up grant potentially available to the Council were uncertain or unknown at the time the budget was set. Therefore the Council took a prudent approach to the level of grant it might receive. The additional grants actually received totalled £3.571m.

As a result of the variations detailed within this report the overall Council-wide surplus generated in year of £1.923m represents the outcome of stringent financial management through the year as the Council continues to meet the extreme challenges of national government policy.

As was detailed within the Budget report presented to Council in March 2018, in addition to the need to respond to the decade long austerity programme, which will see the organisation having to deliver a further £20m of savings over the next two years, the Council continues to face unprecedented financial pressure particularly within Adults and Children's Social Care. This position is not unique to Sefton; however the challenge is significant and will require very careful financial management throughout the remainder of the current MTFP period. The Council acknowledged these risks in its budget report and endorsed the completion of a comprehensive Mid-Year Review exercise in order to gain full visibility on all financial issues and ensure steps are taken to mitigate financial risk and ensure that the Council's target of remaining financially sustainable is delivered. This process will take place over the summer and will be reported to Cabinet in September 2018.

4 Schools' Delegated Budgets Outturn 2017/18

- 4.1 The level of schools' balances as at the end of 2017/18 is £15.411m (£13.834m 2016/17). This overall sum consists of direct school balances of £15.001m (£13.467m 2016/17); Schools Supply Funding Pool £0.066m (£0.013m 2016/17) and the Schools Rates Pooled Account £0.344m (£0.354m 2016/17). The total balances represent 10.15% of schools' 2017/18 delegated budgets. Overall, schools' direct balances increased by £1.534m; similarly, the Schools Supply Pool balances increased by £0.053m; whilst the Rates Pool Account decreased by £0.010m.
- 4.2 The net increase in primary schools balances is largely attributed to the uncertainty of the proposed introduction, by the Government, to fund all schools through a new National Formula. The initial proposals indicated that Sefton Schools would lose in excess of £3m when the new National Formula was fully introduced. The Government has provided some additional funding to schools over the transition period 2018/19 – 2019/20 to ensure that all schools can at least be protected at the 2017/18 per pupil baseline funding but there is no guarantee what protection will be available from 1 April 2020 when the new "hard" National Formula is fully introduced. This has resulted in the net balances held by these schools increasing (note that 55 primary schools increased their balances with 20 seeing a reduction).
- 4.3 The level of balances across the maintained Secondary schools has reduced significantly by £0.856m. This is due to the transfer of a further secondary school to the academy sector and also the use of their balances to see them through difficult times caused largely by cash-flat funding settlements over the last few years, which have gradually eroded their spending power. Many of the remaining secondary schools are also experiencing financial difficulties and there are a number that have requested licensed deficit agreements from the Local Authority in 2018/19.
- 4.4 There is a slight increase in the level of special schools balances. The Local Authority is currently consulting all stakeholders within the High Needs / SEN sector over the significant overspend against the High Needs Block within the DSG. As a result headteachers and governing bodies within special schools are holding back on all but essential spending in case there are proposed changes to special schools funding to help mitigate the current overspend on the High Needs Block.
- 4.5 Nursery schools net balances also went up slightly (three increased with one decrease) but all nursery schools are potentially going to lose up to 50% of their current funding allocations from 1 April 2020 when the transitional protection in the Early Years Formula is reduced by the Government.
- 4.6 A sub-group of the Schools Forum will be examining the levels of all balances held, in October 2018, and where appropriate, schools were asked to demonstrate robust plans for the committed use of any surplus balances within the current challenging environment.

Agenda Item 9

5 Council Balances

- 5.1 The change in the level of Council and School Balances as at 31 March 2018 are set out as follows:

Revenue Account 2017/18	Schools £m	Non-Schools Services £m
Actual Balances at 31 March 2017	13.834	8.103
Plus: Schools' Delegated Budget Net Change 2017/2018	1.577	-
Increase in Balances in 2017/18	-	1.029
Provisional Unallocated Balances at 31 March 2018	15.411	9.132

6 Conclusion

- 6.1 In March 2017, the Council set a three year budget that would through its Framework for Change programme would meet the overall £64m shortfall estimated for the period. 2017/18 represented the first year of that budget and from the financial results reported in this paper it can be seen that this three year budget remains on target.
- 6.2 Whilst the position reported is favourable, in addition to meeting the funding shortfall that has arisen primarily due to central Government's austerity programme, the Council is also facing significant financial pressure from its main demand led budget, Adults and Children's Social Care. The experience in Sefton is currently similar to most local authorities across the country and as a result will require careful financial management in the forthcoming year in order that these pressures are aligned with the delivery of the overall savings target that the Council has to meet. This approach and pressure was identified within the Budget report of March 2018 and will be reflected in a comprehensive Mid-Year Review exercise being completed in addition to an update to the Medium Term Financial Plan.
- 6.3 The Council's accounts are currently the subject to review by the external auditor, Ernst & Young, and following final completion of the audit, the Accounts will be presented to the Audit & Governance Committee in July 2018 for consideration, together with the ISA 260 report that will reflect their findings and conclusions.

Agenda Item 10

Report to:	Cabinet	Date of Meeting:	26 July 2018
Subject:	Sefton Economic Strategy Framework		
Report of:	Executive Director	Wards Affected:	(All Wards);
Portfolio:	Cabinet Member - Regeneration and Skills		
Is this a Key Decision:	Yes	Included in Forward Plan:	Yes
Exempt / Confidential Report:	No		

Summary:

To :

- (1) Update members on the outcome of the consultation process of the Sefton Economic Strategy
- (2) Seek agreement to delegate approval of the final version of the Sefton Economic Strategy and associated action plans to Cabinet Member Regeneration and Skills

Recommendation(s):

That Members:

- (1) Note the outcome of the consultation process of the Sefton Economic Strategy
- (2) Delegate approval of the final version of the Sefton Economic Strategy and associated action plans to Cabinet Member Regeneration and Skills

Reasons for the Recommendation(s):

To update members on progress with this Key Decision and, to allow further time to align this work with the Council's Growth Programme, seek agreement to delegate approval of the final version and associated action plans to Cabinet Member Regeneration and Skills

Alternative Options Considered and Rejected: (including any Risk Implications)

None

What will it cost and how will it be financed?

Agenda Item 10

(A) Revenue Costs

£66,872 revenue was approved from the Growth Budget and Investment and Employment Team Budget to fund the development of both the Economic Assessment and Strategy Framework for Sefton. Following invitation to tender process the work was awarded to Regeneris Consulting.

(B) Capital Costs

None

Implications of the Proposals:

Resource Implications (Financial, IT, Staffing and Assets):
Consultation co-ordination activities was be undertaken by existing staff within existing budgets
Legal Implications:
None
Equality Implications:
The equality Implications have been identified and mitigated.
(Please delete as appropriate and remove this text)

Contribution to the Council's Core Purpose:

Protect the most vulnerable:
Inclusive growth is the core objective of the strategy framework to set a direction for action so that the impacts of economic growth reach many more of Sefton's residents including the most vulnerable
Facilitate confident and resilient communities
Inclusive Growth is the core objective of the strategy framework including a focus on 'People' to better connect economic opportunity to the lived experience of residents; Investing in education, skills and employability is also one of 7 key objectives
Commission, broker and provide core services:
Reconfiguring public services and community led delivery and generating new sources of finance to support growth are two of the 7 key objectives for the strategy

<p>Place – leadership and influencer:</p> <p>Repositioning and reprofiling Sefton is one of the 7 key objectives for the strategy</p>
<p>Drivers of change and reform:</p> <p>Reconfiguring public services and community led delivery and generating new sources of finance to support growth are two of the 7 key objectives for the strategy</p>
<p>Facilitate sustainable economic prosperity:</p> <p>Delivering new development and infrastructure, Creating and growing local, private and social enterprise and securing new inward investment are three of the 7 key objectives for the strategy</p>
<p>Greater income for social investment:</p> <p>Creating and growing local, private and social enterprise is one of the 7 key objectives for the strategy</p>
<p>Cleaner Greener</p> <p>Under Delivering new development and infrastructure reference is made to the mitigation of any adverse environmental impacts as a result of economic regeneration growth; the strategy also focuses on attracting new cleaner greener investment for Digital, particularly the roll-out of ultrafast broadband.</p>

What consultations have taken place on the proposals and when?

(A) Internal Consultations

The Head of Corporate Resources (FD.5217/18.....) and Head of Regulation and Compliance (LD4441/18.....) have been consulted and any comments have been incorporated into the report.

(B) External Consultations

Businesses

Developers

Investors

Professional Intermediaries & Networks e.g. Chambers of Commerce; Federation of Small Businesses; Professional Sefton

Other Liverpool City Region Local Authorities/Chief Executives

Combined Authority

Liverpool City Region Local Enterprise Partnership & Sector Boards

Agenda Item 10

Liverpool City Region Employment & Skills Board

Prime Contractors & Supply Chains

Members of Sefton Leadership Collaborative, including Further Education, CCGs,

Sefton Council for Voluntary Services

The ten Parishes

Organisations with insight into residents of Working Age especially Jobseekers, People on Low Incomes, and Equality Groups

Transport Providers/Commissioners

Any other relevant groups/organisations

Internal consultees:

Elected Members

All members of SLB & Programme Board

Yammer (Sefton Council)

Sefton Business Friendly Group

Implementation Date for the Decision

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

(Please delete as appropriate and remove this text)

Contact Officer:	Mike Mullin/Claire Maguire
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Appendices:

The following appendices are attached to this report:

- (1) Draft Sefton Economic Strategy Framework (March 2018)**
- (2) Sefton Economic Strategy Consultation report**

Background Papers:

There are no background papers available for inspection.

1.0 Background

1.1 Cabinet Member – Regeneration authorised the preparation of an Economic Assessment and Economic Strategy for Sefton at her meeting of 1st September 2016 and consultants Regeneris were appointed by open competitive tender on 10th October 2016.

1.2 In 2016 the council carried out a borough wide consultation and asked people what they thought was important for Sefton now and in for the future. Over 5,000 people took part and the information helped to develop the Vision for Sefton 2030. People told us what was important and this included:

- Looking after our town centres
- Having houses that people can afford to buy or rent
- There needs to be more jobs for people

1.3 The Sefton Economic Assessment, a factual statement of the borough's strengths and weaknesses, opportunities and threats, was approved by Cabinet Member – Regeneration at her meeting of 9th March 2017. The Cabinet Member also approved at the same meeting the preparation of a draft Strategic Framework for Action, or the building blocks of the Strategy.

2.0 Consultation exercise

2.1 Business and Public consultation started on 8 March and ended 4 May 2018; an extra week was added to allow for known late responses and letters of representation. The purpose of the consultation was to inform stakeholders of the Council's Economic Assessment, and to consult (seek views) on the draft Framework for Action, the building blocks of the Sefton Economic Strategy. The focus for the consultation was the actions arising from the findings of the Assessment:

- Creating more higher quality and better paid local jobs
- More people in work and in more productive jobs
- Strengthening the skills base to deliver economic growth and benefit communities
- Deliver new housing and employment land to enable growth
- Improve the digital infrastructure and extend its benefits
- Improve transport infrastructure for growth and sustainability
- Tackle health and well-being challenges experienced by some of Sefton's communities
- Make more of Sefton as a place to live, visit and invest in.

2.2 A stakeholder analysis was completed, which guided priorities for the consultation. The consultation methods were matched to the stakeholder analysis, and to the level of consultation. Focus groups in the north and south of the Borough were proposed to capture the views and input of job seekers and adults with learning disabilities on the key themes. The consultation plans were presented to the Public Engagement and Consultation Panel on the 17th November, 2017.

2.3 The following process was used:

- The draft Sefton Economic Strategy document (**Appendix 1**)
- A standard version questionnaire (on eConsult, hard copy and distributed to libraries)
- An Easy Read version of the questionnaire
- Information to the InvestSefton Business Mailing List (c.3,700), directing them to the on-line questionnaire
- A Business Focus Group

Agenda Item 10

- Focus groups in the north and south with Sefton@Work clients
- A Focus group with StrandbyMe attendees
- A Focus group with People First (Adults with learning disabilities)
- Information on the Sefton Council website and intranet
- Information on social media

3.0 Results

- 3.1 A copy of the full consultation report is attached as **Appendix 2**.
- 3.2 The consultation received an excellent response with a total of **189 returns** received through focus groups, online surveys, telephone contacts and written returns. This is a **65% increase** on a similar exercise carried out in 2014. The strategy's focus on Inclusive growth, which encompasses wellbeing, housing and infrastructure helped generate a larger response from **residents (49%)** and **Sefton's business community (30%)**. There was also a good geographical split with more **north Sefton responses (47%) than in 2014**.
- 3.3 The vast majority of respondents (91%) across all modes of engagement agreed that our Economic Strategy should focus on the three broad aims of **People, Place and Productivity**. Although online surveys provided many shorter responses, the more detailed and qualitative information we received came from the resident and business focus groups and these have been vital sources of intelligence in identifying recurring themes that Sefton should focus on for the coming period. The themes that have been expressed more frequently and strongly include the following:
- Sefton's strategy needs to make our **relationship with the Liverpool City Region** clearer and identify where Sefton's strengths should be at the sub-regional level. This includes a clearer outline of the **alignment with City region strategies** and policies that will impact our plans for Sefton. e.g. LCR Growth Strategy; Skills, Growth, SHELMA, BEIS Clean Growth; Northern Powerhouse. A similar approach should be undertaken with regard to national policies such as the government's Industrial strategy and Apprenticeship reforms.
 - The Council should develop a **Business Growth and investment** policy; There should be stronger reference to the Council's **Framework for Change-Growth objectives**
 - More support for businesses and start ups across the borough; While there is a need to do more to develop business growth and **attract inward investment**, we should also recognise and celebrate the borough's achievements and successes in these areas
 - Stronger reference should be made to Southport Business Improvement District and its links to the Council
 - The introduction of focus on **Sefton's Digital and Creative sector** was broadly welcomed and should be developed into key actions e.g. Business incubators; Investment in fast broadband internet connectivity in town centres
 - Many Sefton residents continue to need **personalised assistance** to enter and sustain meaningful work that lifts them out of the benefit system
 - We need to ensure that more effective **support is available for our vulnerable young people** to help them make the transition from learning in schools or college into sustainable careers
 - Sefton should **recognise and celebrate good local employers** willing to give opportunities to workless residents and vulnerable young people
 - Stronger reference to **Southport/Manchester rail link** and subsequent economic opportunities
 - Sefton should focus effort on ensuring that all residents have **access to second chance learning opportunities** to enable them to achieve their economic potential.

- **Improved transport connectivity** and **better signage** in the borough
- Sefton needs to secure the biggest impact in terms of **job creation, training and placements** for residents through the use of **Social Value** . This means greater leverage through Planning, Licensing and Commissioning of services across the Council and partners generating opportunity for local residents and businesses
- Stronger reference to **Bootle, Crosby and Southport Investment strategies**; more information on plans for other areas should also feature e.g Maghull, Formby
- Stronger reference to **Skills development, the Apprenticeship levy, Enterprise and Post 14 student work experience and Further/Higher Education establishments** and their role in the Strategy.
- More understanding about what **inclusive growth** means to those in marginalised groups
- Develop and improve **affordable housing opportunities to help retain younger people in Sefton**
- **Allay any fears** over the Planning system becoming too relaxed in efforts to attract new inward investment
- **Make better use of Council's own assets** including town halls, libraries , CPOs
- Better understanding of **third sector opportunities** arising from the reconfiguration of public services and community led development
- Being clearer about what our **current economic strengths** are and what our potential for future development could be

3.4 The totality of the response broadly confirms the original Objectives of the Sefton Economic Assessment approved by Cabinet Member in March 2017. These are listed on page 2 under Consultation but can be summarised as follows:

- More higher quality and better paid jobs
- More local people in work, upskilled and working in more productive jobs
- Increased housing and employment land to deliver growth
- Improve Sefton's fast broadband and digital infrastructure; create more digital/creative business and employment opportunities
- Improve strategic rail links and transport infrastructure for future growth including signage; coast and town centres
- Tackle health and well-being challenges in Sefton communities
- Make more of Sefton as a place to live, work, visit and invest in

4.0 Key opportunities & Priority actions

4.1 The Focus groups provided insight to both resident and business thinking on the key opportunities and actions arising from the strategy. Key themes included:

- **Health & Wellbeing** was the top priority for the People First and Strandbyme groups, noting that good health is a conduit to gaining work, **developing skills and increasing job prospects**; Education & Skills for people of all ages together with **better paid jobs** was also a key factor
- **Businesses need to better understand the specific needs of those with health conditions**, special needs or disabilities seeking work and how they can be valuable assets to the workplace
- Focus groups with workless residents principally highlighted the reducing support from national sources and their reliance upon locally driven services. This was particularly felt in the context of Universal Credit as “ digital by default”
- Having **faster internet access** also featured strongly in discussions

Agenda Item 10

- Businesses identified key thematic areas for action; **business growth, more sustainable start-ups; new investment and innovation; job creation, skills; physical regeneration in Sefton's coast, town centres; transport infrastructure and support for the social economy.**
- **Greater collaboration at city region level;** maximising external funds for the benefit of Sefton businesses and residents e.g. European; Devolution monies
- Firm up on agreed priority actions already agreed in Strategy but ensure they are both **deliverable and measurable;**

4.2 Those respondents who have requested to be kept advised of the final version and action plan will also be placed onto a database in line with GDPR. The Strategy is intended to provide a clear framework for action to assist the Council with its ambitions for:

- Business Growth & Investment
- Business Generation & Enterprise Culture
- Sector Development
- Nurturing new Growth Clusters
- Place Marketing and Inward Investment
- Town Centre Investment Strategies and Frameworks
- Post-Inspection Revision of the Local Plan (2017), including Land Availability for Housing and Employment
- Infrastructure Planning
- Strategic Transport Planning and Scheme Identification
- Workforce Development & Skills
- Employability and Inclusive Growth
- Public Sector Reform and the Council's Transformation Programme
- Social Value in Commissioning and Procurement

4. Regeneris Consultants have completed the first two phases of the contract (Assessment and draft strategy). Officers will work with Regeneris to finalise the report. The key next steps are:

- Update Cabinet on 26 July
- Present final consultation report to Public Engagement & Consultation Panel -14th September 2018
- Revise and produce final Sefton Economic Strategy based on key findings and feedback from the consultation exercise
- Present Final report to Cabinet Member before release
- Share final report and key actions with those respondents who have asked to be kept informed
- Build into Council's Growth Programme



REGENERIS

Economic Strategy Framework for Sefton

A Draft Report by Regeneris Consulting

March 2018

Agenda Item 10

Economic Strategy Framework for Sefton

March 2018

www.regeneris.co.uk

Contents Page

1.	Introduction	1
<hr/>		
2.	The Opportunities for Sefton	2
<hr/>		
3.	Strategic Objective and Focus	8
<hr/>		
4.	Priority Action Areas	10
<hr/>		
5.	Measuring Success	34



1. Introduction

- 1.1 Sefton needs to set itself an ambitious set of goals for change. The borough has untapped economic potential and intends to take full advantage of the opportunities within its reach. Sefton's residents and businesses can clearly generate wealth and succeed in the modern economy.
- 1.2 However, the proceeds and opportunities of growth are not evenly shared. Sefton has a prosperous middle, a comfortable but ageing North and real challenges in the South. It is time to take stock and to set out a bold plan for economic growth across Sefton. This must re-engage communities left behind by economic change and ensure there are real local benefits in pursuing growth.
- 1.3 This is the first draft of the framework for a new economic strategy for Sefton. Its purpose is to:
 - Identify the key economic and social challenges which should be the focus of the strategy.
 - Set the headline economic growth objective and the framework for action.
 - Outline the action areas that will guide delivery of the strategy, reflecting current, planned and new priority actions.
- 1.4 The challenges and opportunities outlined within this Framework underlines the importance of working in partnership with the Liverpool City Region, the private sector and alongside the community and stakeholders, to deliver the growth and improvements Sefton deserves. Sefton Council will actively use its role and assets to facilitate and enable growth but it will take the commitment and input from all stakeholders to create a new vibrant economy for Sefton.



2 The Opportunities for Sefton

The Big Picture

- 2.1 Sefton has assets in its **people, places, businesses and connectivity** to deliver economic growth which makes a real difference to the lives of its residents and communities. To achieve this, it must tackle historic economic weaknesses, make the most of its greater qualities, and ensure its businesses and workforce is resilient in the face of continuing economic, social and environmental change.
- 2.2 Despite a challenging economic back-drop over the last few years and an underlying pattern of under-performance, **new commercial investments** are being made into Sefton. There is strong interest from the market to do more at sites along the Dunnings Bridge Road corridor including Atlantic Park and Chancerygate. There is the potential for significant new commercial development around the Port and links to Port related trade, and scope to expand commercial activity at other key employment sites in the borough including Southport Business Park, where the transatlantic internet cable is received. The key will be to ensure that Sefton has the supply of sites for future commercial development that provide the scale, quality and location that give it the flexibility to respond to the needs of changing markets.
- 2.3 However, the borough remains what many would consider, too **over-reliant on lower paid sectors**. The visitor economy is a pillar of Sefton's economy and continues to be a priority sector across Merseyside, but it tends to offer relatively lower paid and seasonal employment. Whilst austerity has seen reductions in funding and employment in the public sector, (HMRC recently announced closure of all Bootle offices by 2020/21), central government functions based in Bootle, the local authority and the health/care sectors remain key employers. Some employment in these sectors are higher skilled and higher paid, but the majority of employment is lower value.
- 2.4 Securing more representation of higher value sectors, and better paid jobs for Sefton's residents, are central to tackling the borough's **productivity challenge**. Only 9% of Sefton's workers are employed in so-called knowledge intensive industries compared with 13% in the LCR and 15% in England. The rate at which the borough creates and sustains new businesses is lagging against comparable areas elsewhere, and larger businesses are significantly under-represented.
- 2.5 In many respects, Sefton is an attractive place to live with some high-quality towns and villages, an outstanding coastline and good connections to major employment centres in Liverpool and Manchester. These are strengths which have helped it to attract and retain



higher income households, entrepreneurs and middle class suburban populations working in Liverpool, the borough and beyond. However, this also underlines the contrast between more prosperous people and places, and those communities locked into a low-income local service economy, and those excluded from the benefits of growth.

- 2.6 There are **well-established regeneration priorities** for Sefton's places. **Southport has historically been the focus of significant amounts of public investment and**, like many coastal towns, continues to strengthen its destination appeal, by securing new investment that will regenerate and bring new attractions and spending to the resort. **Bootle, has also been the recipient of regeneration investment** yet more is needed, in order to place the area on a more prosperous and thriving footing. Delivery of major new regeneration in North Liverpool, opportunities that are arising out of the Port and ambitious plans for the town's retail and leisure core, provide the platform for change in Bootle. The retail and leisure core of **Crosby** village demands to be revitalised, with significant developer-led interest in this location. The desire to improve access to **Sefton's coast** and offer more to visitors and residents is recognised, balanced with the need for environmental protection and conservation.
- 2.7 Sefton has tried to tackle its **relative decline and underperformance** over the last 40 years during times where much more public investment was available to regenerate communities and stimulate growth. Although, some significant successes have been achieved by a range of interventions and programmes, there remains a **growing gap with other parts of the country**.
- 2.8 Too many households in Sefton have lived with **deprivation, mental health, poverty, low household incomes and other health-related challenges** for too long. Many of the borough's children get a good start in primary schools, secondary schools and colleges; however much more is required to prepare young people, to get the skills, ambition and know-how they need to succeed in the changing economic landscape.
- 2.9 Beyond Sefton and the LCR, the **UK's decision to leave the European Union** brings new challenges as well as opportunities and uncertainty for the borough's businesses, workforce and communities. Understanding what leaving the EU and the Single Market means for the country, the city region and for Sefton is crucial. Although it is too soon to determine precisely what the downside and upside impacts are likely to be, the key challenges for Sefton will be to anticipate and be prepared for change, and be flexible enough to adapt to the change that might follow. Clearly, the recent investment into Liverpool Port at Seaforth in Sefton sees the major site of national infrastructure prepared to embrace new transatlantic and Far East freight demands.



Key Challenges

2.9.1 Sefton's Economic Assessment (June 2017) has highlighted seven specific economic challenges for the borough:

1: Delivery of new housing & employment development, essential for growth and regeneration

2.10 The emphasis in the economic strategy framework must be on the delivery of land for housing and commercial development. The challenge is to translate the Local Plan's allocations, including sites owned and controlled by Sefton Council, into developments which provide the mix of housing and commercial premises that meets the needs of residents and businesses.

2.11 New housing will help to underpin regeneration in Sefton's towns, bringing new residents, spending and demand for services that will support their sustainability. Both new housing and commercial development will help to increase revenues through Council Tax, New Homes Bonus and new Business Rate income. The Local Plan identifies the need to provide 11,520 new homes in the borough over the next 15 years. This will require significant construction investment, creating a large number of construction jobs. Where possible, Sefton needs to capture the benefit of this activity for local people and companies through targeted initiatives to promote the inclusion of local residents in employment and relevant training opportunities and enable local companies to secure additional contracted activity as a result of these developments.

2.12 The key challenges for commercial development revolve around the scale, quality and location of employment sites in Sefton to meet future demand. Market preferences change over time and the borough must ensure it has enough flexibility and choice in its supply both to respond and to be anticipating this change in the longer term. The past few years have seen some significant changes in commercial development activity. Internet trade and direct customer delivery has seen substantial growth in the demand for logistics and distribution space. Demand for high spec office space has recovered but is unlikely to return to the levels that saw speculative development and large scale publicly backed schemes in the 2000s. There is also an undersupply of incubator/start up space, particularly for high value new businesses in the digital and creative sector. Modern manufacturing is also seeing a growing need for older stock and sites to be upgraded or replaced.

2.13 Ongoing work to identify the scale of employment land needed to support the growth of port-related activity, points to a very substantial need across the Liverpool City Region and Sefton, needs to determine how it best contributes to this, as well as to the wider



opportunities that stem from development at and around Liverpool 2 itself.

2: Need to make much more of Sefton's qualities as a place to live, work, invest in and visit

2.14 Significant parts of Sefton have a very good reputation as attractive places to live, visit and invest in, enhanced by good connectivity to Liverpool. The challenge for the borough is to make more of these qualities. Attracting new residents to move to the borough will help to generate additional spending potential in Sefton's retail and leisure businesses, reinforcing place-making investment.

3: The need for more, better paid, higher quality jobs in Sefton

2.15 Creating new jobs in Sefton is a primary objective for the Economic Strategy Framework. The borough's large resident labour force and its accessibility to people and businesses in the wider area, point to both a need and the capacity for employment growth. The emphasis must also be on the growth of *higher quality and better paid jobs*.

2.16 Generating better paid and higher quality local employment as part of activity to bring more jobs to the borough will deliver wider social benefits for Sefton's resident communities reflecting the strong links between decent work, income and well-being.

2.17 The recent rise of precarious employment is both a key barrier to people's engagement in Sefton's economy and an important contributory factor in the health and well-being challenges faced by some residents. Progressive action which enables more of Sefton's residents to compete for and secure better paid work must be an integral part of the economic strategy framework.

4: Investment in education and skills is key to delivering growth that benefits residents

2.18 The changing economic and employment landscape, education, skills and the impacts that they have on employability are key factors linking people to work in Sefton. Investing in education and skills is critical to the start that Sefton's residents have to their working lives, to their progression in work and to their ability to change direction or re-enter work in later years.

2.19 This challenge points to the need for action which links learning, employability and employers in Sefton, and which provides broader support extending both to the individual and families to enable more residents to enter and progress in work. Young people need the employability skills to ensure they are ready for work and to help them make the right choices about the academic and vocational pathways in front of them. Adults who are vulnerable or who suffer with ill health need access to high quality, accessible



interventions that are both person-centred and able to respond to the changing needs of the employment market.

5: Targeted investment in transport infrastructure & services to support growth

- 2.20 High quality infrastructure (transport, utilities, digital) is an enabler of growth and an important factor in what makes Sefton a good place to live, work and run a business. Securing new investment in Sefton's infrastructure, and commitments to improving transport services, should therefore be priority areas for action in the borough's economic strategy.

6: Need to improve digital infrastructure and ensure more residents and businesses benefit from it

- 2.21 Rapid change and growth in digital technology and services present both challenges and opportunities to Sefton's economy. Simply keeping up with a fast expanding market is a challenge but the borough needs to think 20 years ahead if its residents and businesses are to be successful in an age of digital services and automation. The digital economy will be a driver of economic growth and an enabler for the engagement of individuals and communities in the local economy.

7: Tackling health & well-being must be integral to growth strategy

- 2.22 The health and well-being of Sefton's residents are tightly bound into the area's economy. Whilst the borough ranks as one of the happiest areas of Merseyside, there are some significant and entrenched challenges in which economic factors are both a contributory cause and a potential solution.
- 2.23 Data indicates that too many people in Sefton continue to be disconnected from work and disengaged from economic growth. Large and growing numbers of Sefton's working age population claim sickness related benefits. Thousands of families exist without work and too many people are unemployed or in precarious work that does not give them sufficient earnings to enable their financial independence. The poverty this generates compounds and drives poor health, lower levels of life expectancy and sustains ongoing patterns of deprivation.
- 2.24 Sefton Council and its partners recognise the strong but complex connection between health, well-being and the economy. The connectivity between health and employment and skills underpins much collaboration and there is potential for more to be achieved. The absolute importance of the health and social care sector in terms of its size and skills requirements is also recognised. Concerted action to address the health issues faced by some residents will better enable them to access the opportunities brought by new jobs



and investment, and help ensure that the benefits of growth are experienced more widely across Sefton's communities.

- 2.25 The ability of some residents to create and take advantage of the opportunities around them is limited by mental health issues and this is increasing in prevalence. They are significant barriers to people securing work, as well as a challenge for people in work, particularly those in low paid and lower skilled occupations. The Council and its partners recognise that young people are at risk of suffering mental ill health and support a range of relevant interventions.



3 Strategic Objective and Focus

Inclusive Growth

- 3.1 Inclusive growth is the core objective of Sefton's new Economic Strategy Framework. The established cornerstones of an economic growth strategy – delivering new development, creating new jobs and businesses, supporting Sefton's established businesses to grow, and securing significant new inward investment - are all essential to increasing the borough's prosperity. Sefton must be receptive and encouraging to private, public and social enterprise, and it must create the conditions for it to be successful.
- 3.2 However, the new Framework must set a direction for action so that the impacts of economic growth reach many more of Sefton's residents. It must also better enable people to see that they are contributing to growth. This means:
- A drive for higher pay and higher productivity business and jobs in the borough, balanced with the priority given to generating more jobs.
 - More residents with the aspiration, opportunity and support to succeed in a changing economy
 - A more connected and accessible system of local support for residents of all ages to enter or re-enter the labour market after being excluded from it and prosper in employment or entrepreneurship
 - Different and new ways of connecting Sefton's economic, social and physical infrastructure.
 - Creative and practical approaches to delivering new private and public investment in a tough financial climate.
- 3.3 The concept of inclusive growth is not a new one, but it has become much more prominent in the aftermath of the UK recession. Flat productivity growth, static or falling real incomes and continuing economic inequality have focused renewed attention on how the benefits of economic growth are distributed. With it, there is also renewed focus on how exclusion limits the potential for people and places to flourish. Our commitment to Inclusive Growth in Sefton will require us to measure what we value, combining the results of our economic and social impacts.



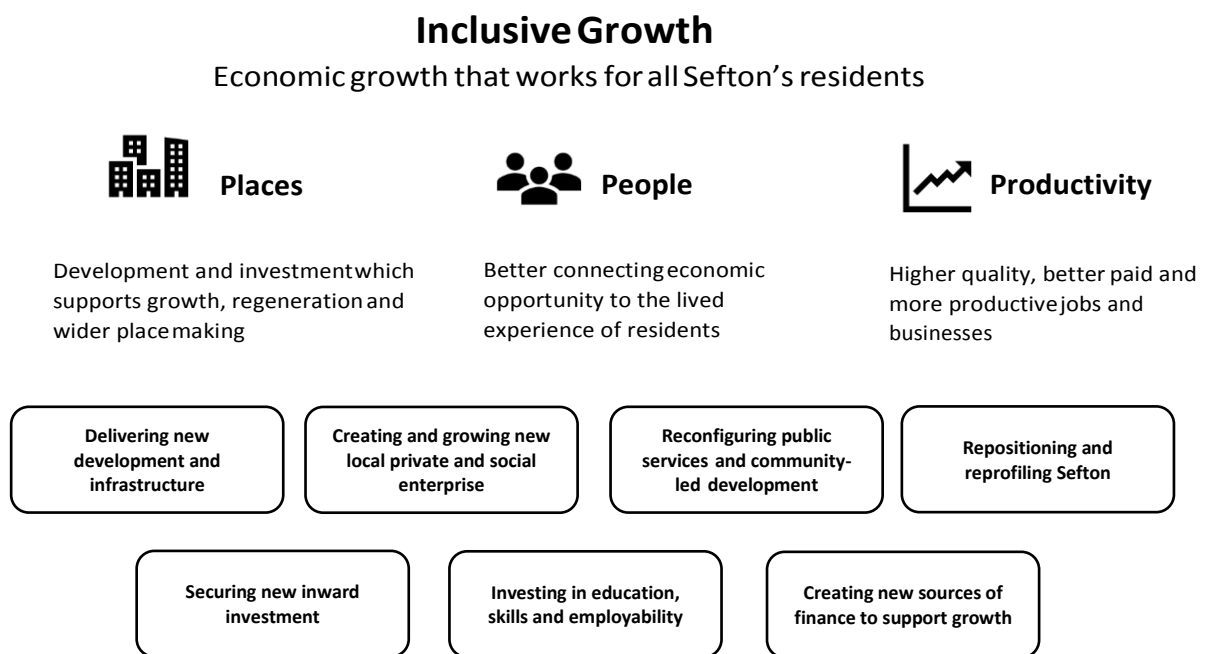
A Framework for Action

3.4 The focus of action revolves around three themes that link the key economic challenges for Sefton to the inclusive growth objective. They are:

- **Places** – giving priority to new housing and commercial development, the regeneration and revitalisation of Sefton’s towns and broader investment in place- making.
- **Productivity** – recognising that the priority of creating more jobs, more businesses and business growth in Sefton should be balanced with action to improve the quality of work and how much it pays.
- **People** – putting Sefton’s residents at the heart of the economic Framework and equipping them with the skills and confidence needed to participate in a tough labour market and make a positive contribution to Sefton’s economy.

3.5 Seven broad action areas follow from this, summarised in the diagram below.

Figure 1.1 Framework for Action



4 Priority Action Areas

4.1 This part of the Economic Strategy Framework sets out the priority action areas that will guide Sefton Council and its partners. It captures:

- Key activity that is already a priority and is being implemented.
- Planned activity which is yet to commence and which should be given priority.
- New lines of action for Sefton Council to consider looking forward.

4.2 A brief description is given for each action, including its main objective. Broad types of priority action are identified, with examples to show what delivery will mean in practice. This is **not** a detailed action plan, which will be developed by Sefton Council as it adopts its new Economic Strategy Framework.

Priority Action Areas

1. Delivering new development and infrastructure

4.3 Delivering new development, regenerating Sefton's towns and providing new, modern infrastructure which supports growth, is crucial to the economic strategy building on the work being undertaken to deliver the aspirations and ambitions outlined in the town centre Investment and Development Frameworks.

4.4 Sefton's newly adopted Local Plan targets the delivery of 11,520 new homes between 2012 and 2030, together with 82 hectares of employment and the infrastructure (transport, utilities, broadband) to support growth. This provides the platform for housing, commercial and other forms of development to drive economic growth and be a catalyst for change in Sefton.

Objective

4.5 The goal is to secure the delivery of new development in Sefton which supports the growth of its population, the creation of new employment and the delivery of major regeneration.

Priority Action Focus

4.6 **Delivering new employment sites and premises, improving the existing stock and ensuring choice:** This centres on the way that Sefton Council works with its own land and



assets and with private land/owners and developers to secure development on new and existing employment sites. Actions to achieve this priority should include the approach to public and private investment, in site preparation and infrastructure, development agreements and the securing of developers and occupiers.

- 4.7 Dunning's Bridge Road will be one focus of action, guided by the Economic Investment Strategy for this key employment corridor. This will centre on the delivery of new and upgraded premises on established sites (e.g. Atlantic Park, Chancery Gate) and new sites (e.g. employment land at Maghull East) supported by continued inward investment promotion. Responding to current high levels of demand for medium and large sized logistics sites across the City Region, with Dunning's Bridge Road a target location for operators, will be a key challenge. Beyond the delivering of its Local Plan allocated land for employment, Sefton Council needs to be considering now what steps to take to provide the long-term pipeline of sites that will enable it to make the most of changing demands from employers and developers, and to new opportunities to capture inward and growth investment that will inevitably emerge and which could not have been foreseen by its Local Plan.
- 4.8 **Capturing the benefits of Port-related trade:** Expanding trade linked to Liverpool 2 is likely to generate need for new sites and premises adjacent to the port estate around Seaforth and on the western side of Bootle, as well as creating opportunities for new investment linked to the handling and distribution of freight by road and rail.
- 4.9 Capturing new business serving the port will require premises and potentially sites to accommodate this growth in an area in which there is already a broad mix of established employment uses. Sefton Council will need to work with Peel Ports, and take due account of the Highways England proposals for a major port access improvement, to manage these demands so that they maximise the business and employment benefits to the borough whilst mitigating any adverse environmental and community impacts.
- 4.10 **Regenerating and redeveloping Bootle:** Capitalising on the Strand acquisition and the Council's land and premises in Bootle transforming the town by improving and expanding its town centre leisure offer, increasing and widening its market and affordable housing supply to bring more residents to central Bootle, and by capitalising on its role as an employment centre by modernising, upgrading or converting its large stock of offices.
- 4.11 Sefton Council and its partners should push opportunities to deliver new and innovative housing and other development which encourages people to think differently about the town. An initiative such as Depot Two Zero (new modern start up space in Merton House, Bootle) is a good example of repurposing town centre sites in ways which could generate new business and economic activity locally. Sites such as the Coffee House Bridge and emerging ideas for canal-side development present exciting opportunities for



development.

- 4.12 The town already benefits from a wide boulevard/grid layout, and improvements to its accessibility to town centre users and as a gateway to Liverpool by both car and public transport should be an integral part of its regeneration.
- 4.13 **Delivering new investment and regeneration in Southport:** Securing new investment in the resort's heritage, adding to the critical mass of year round visitor attractions and retaining a strong events programme are key. This includes investment in historic Lord Street, leisure, business conferencing and in Southport's beachfront offer. In respect to employment sites/premises, bringing forward new opportunities at Southport Business Park should be a priority and seek to capitalise on the unique ultrafast connectivity offered by the GTT connection located here. Southport's Development Framework provides a clear picture of investment priorities, including improvements to Lord Street, extending the family leisure offer on the beachfront, raising the quality of accommodation and improving its food, drink and niche retail offer.
- 4.14 The aim is to strengthen Southport as a visitor destination by broadening its offer and raising the quality on the range of facilities and activities it delivers for visitors, including its major events programmes and the potential to generate more conference trade. The town's role as a key employment centre in the north of the borough points to action that expands its supply of business premises and provides business support to enable new businesses to start and take off in the town.
- 4.15 **Regenerating Crosby Village:** Delivery of new retail, leisure and targeted housing development in and around Crosby Village, alongside investment to improve accessibility to the village centre. Opportunities should be pursued on key sites to bring new retail and leisure occupiers into the village centre as part of the wider strategy to increase footfall. The Council and its partners would also invest in public realm and other environmental improvements to the village centre.
- 4.16 **Coastal gateways:** New investment in visitor infrastructure at key access points to the borough's outstanding coastline is required. Actions are needed which enable Sefton to offer visitors more incentives to spend time and money in the area, balanced by the need to protect the environmental quality of the coastline. The key locations include Crosby Lakeside and Another Place, Crosby Coastguard Station/Hall Road, Formby Point, Ainsdale-on-Sea and sites on Southport's beach front.
- 4.17 **Deliver key strategic transport investments:** Sefton has an established transport investment programme and this will be its focus for action over the next few years. The key schemes include Maghull North Station, further dualling of the A565, improvements at Junction 1 of the M58 and the A59 through Maghull and Aintree and



the A570 south eastern approaches. The delivery of new employment development on the Dunnings Bridge Road corridor will also require investment to improve traffic flows, reduce congestion and respond to the expansion of port-related traffic.

- 4.18 The borough should work with Merseytravel to ensure that investment in Merseyrail's rolling stock results in improvements on lines that serve Sefton, together with continual monitoring and any improvements to bus services to ensure they respond to new housing and commercial development.
- 4.19 Beyond targeted investment within the borough, Sefton Council will need to work with rail franchise operators and Network Rail to deliver long-term improvements to services connecting Sefton's towns with locations to the east including Manchester and Preston, and to the national rail network. Continued dialogue with Peel Ports about port-side rail infrastructure and with the City Region, central Government and Network Rail about rail freight capacity on the Bootle Branch line, the west coast mainline and Trans Pennine routes will be important if the potential to move freight into and out of Liverpool 2 by rail is to be realised.
- 4.20 **Digital:** business parks and the centre of Bootle should be targets for accelerated roll-out of ultrafast broadband to help local businesses trade and innovate and to provide a set of hotspot destinations for digital investment. Bootle could be developed as digital test bed for social initiatives and business innovation.
- 4.21 Wi-Fi for public areas in Southport and Bootle could help attract a new generation of residents, visitors and shoppers drawn to attend and participate in events, networking and community development
- 4.22 Sefton should also be looking to secure Full Fibre networks and Ultrafast Broadband building on the investment that has resulted in 99% of the borough having access to Superfast Broadband
- 4.23 Investment in digital infrastructure should be complemented with programmes targeting schools and training provision to equip people with digital skills to promote digital inclusion.
- 4.24 **Delivery of high quality supporting infrastructure:** This is crucial to new housing and commercial development. Sefton Council should work with developers and infrastructure providers (e.g. utilities) to ensure that development sites and existing commercial premises secure the best possible provision of power and other vital services.



How does this action area contribute to inclusive growth?

- 4.25 New housing, commercial development and wider regeneration will generate new employment, new businesses and business growth in Sefton. It will have direct impacts, through jobs created in the preparation and construction of new development, and through their end uses as businesses and organisations occupy new commercial and other premises across the borough.
- 4.26 The opportunity for Sefton is to maximise social value opportunities by working with developers, occupiers and organisations in the public sector to link employment opportunities to Sefton's residents. Although it is a more difficult task, finding ways to encourage and support employers to deliver better paid and full-time work should also be a priority. Over time, targeted investment marketing in sectors which deliver higher/middle-level skilled employment should also be part of the strategy.
- 4.27 The action area will also have an extensive range of indirect impacts on inclusive growth. Both businesses operating in Sefton and public sector employers spend money on goods and services to support their activity. Some of this expenditure is already retained within the borough, but there is substantial scope to work with these companies and organisations to better enable businesses in Sefton, including new businesses, to compete for and secure supply chain contracts.
- 4.28 In its own right, transport and other infrastructure investment will generate economic benefits by unlocking investment, reducing costs to businesses and better enabling people to access employment. Collaboration between local stakeholders will focus on how employment opportunities generated from these investments can be captured and targeted towards local people who will benefit from these opportunities. High quality infrastructure will make Sefton more attractive to investors and to people considering moving to the area, both of which are important to the wider economic benefits of this type of investment. Giving the borough an edge in ultrafast broadband and digital skills to go with it will enable it to compete in an economy which will be increasingly driven by technology.
- 4.29 Finally, new housing and commercial development will contribute to increasing land values and the commercial returns from investing in Sefton. Whilst this effect must be balanced against the need to remain cost competitive and to safeguard the supply of more affordable housing, the upsides are positive signals to the development market as well as the potential to generate more revenue in the form of increased Council Tax receipts from new housing and higher business rate income.



Delivery Tactics

4.30 Sefton Council and its partners already recognise that working with private sector investors and developers, alongside public sector funding bodies, is essential to achieving its development and regeneration objectives. To make the most of new investment for the borough, the following should be at the core of the way that Sefton Council approaches delivery:

- Following through on regeneration and investment strategies for Bootle, Crosby, Southport and the coastal area so that they guide development over the next 10 years.
- Engaging early with preferred developers on specific development sites, particularly those owned by the Council and key strategic sites.
- Ensuring that the planning system operates as efficiently and positively as possible to minimise delays and reduce barriers to development.
- Working with developers, businesses and public sector organisations operating in Sefton to create opportunities for Sefton’s businesses (private and social enterprises) to secure contracts to supply developments and end users, building further on Invest Sefton activities.
- Connecting activity which provides training and support to the borough’s residents to employer recruitment, building further on Sefton@Work activities.
- Providing opportunities for residents to update their skills to rejoin the workforce through Sefton Adult Learning Service.
- Developing the case for strategic infrastructure funding targeting Sefton’s main infrastructure priorities.
- Ensuring that local training providers and FE Colleges receive timely intelligence about investments.
- Strategically expanding Sefton Council’s asset base and using its land and property holdings to pursue development objectives. This includes establishing investment vehicles for new housing and commercial development and developing the case for Extra Care housing for older people in Sefton, which would provide them with independent living accommodation, but also with on- site care services available.

2: Creating and Growing Local, Private and Social Enterprise

4.31 Sefton needs to increase the size of its business base to enable the business tax base to grow and to spread the benefits to residents through the creation of more jobs which they



have the requisite skills to access. Sefton has 50 businesses per 1,000 working age residents, which is considerably lower than the England average of 68. Sefton's reliance on public sector employment (24%) has left the borough exposed to austerity measures and private sector employment growth has not been able to compensate for the shrinkage in the public sector. Business start-up rates are low, generating 69 new businesses per 1,000 population which is significantly below the national average of 94.

- 4.32 We need to develop resilience to economic change through providing strong economic foundations for growth and a diverse business base. Substantial investment in major projects and infrastructure such as SuperPort and Atlantic Gateway will support the diversification of Sefton's economy, alongside support for key opportunity sectors such as Business and Professional Services, Construction and Low Carbon, Digital and Creative, Manufacturing, Port and Maritime the Visitor Economy, including Arts and Culture and potential Rural economy activities.
- 4.33 As public sector reforms reduce the breadth of services on offer, there is a potential role for the Third Sector to step into the breach and diversify and, where appropriate, commercialise their current offer. However, there needs to be a refreshed approach to partnership with Sefton's social enterprise base to identify where opportunities may exist, and a supportive environment to fully realise this potential.

Objective

- 4.34 Sefton needs to grow the business base through creating and growing new private and social enterprise. It must embrace growth and ambition across the business base, and provide more focused intervention to realise potential where it is considered greatest, which may include key opportunity sectors and target geographies.

4.35 Priority Actions

Sefton needs to facilitate the achievement of this objective through:

- Ensuring Sefton is well positioned to maximise the benefits from emerging Liverpool City Region proposals for a Single Investment Agency, Local Growth Hubs and post December 2018 European Structural Investment Funding.
- Aligning business growth and investment activities with the key regeneration programmes in Sefton's Framework for Change.
- Ensuring Sefton maximises the benefit of planned future UK Government, European/Post Brexit business growth, enterprise support and investment



programmes

- Ensuring business growth, enterprise support and investment activities and plans fit with Sefton (Vision 2030), National (UK Industrial strategy), City Region (LCR Growth Strategy); European Structural Investment Fund strategies.
- Ensuring the physical infrastructure to support start-up activity is in place, including serviced workspace, incubation space and associated support and facilitation.
- Opportunities to deliver a sector specific offer aligned to key opportunity sectors should be considered, for example, Southport Business Park and activity across the town could provide an opportunity to incubate and grow new digital businesses and digitise the business community in that area through an offer combining innovative office and work space with business support providing specialist advice on innovation, growth, funding and finance.
- Focusing on building up Sefton's start-up rates through a tiered business support offer, which includes lower intensity provision available universally to all business types and higher intensity provision targeting key opportunity sectors and scalable companies which have the greatest potential for growth. As part of this, action to maintain and further develop a single point of contact and frontline support framework should be a priority.
- Promoting a cultural change in attitude to enterprise, innovation and leadership which starts in school and which inspires and enthuses young people to be ambitious and optimistic about the future. This requires effective engagement by employers in delivering career inspiration activity to include: mentoring, visits, talks and work experience and for the education system to embed this offer into the curriculum and ensure careers advice and guidance is impartial. The Council has a (statutory) role to play in this agenda through securing impartial advice and guidance for young people who are not in employment and education (NEET) and Sefton seeks to ensure this service provision contributes to our Inclusive Growth agenda
- Facilitating peer learning through encouraging Sefton businesses to participate in benchmarking and best practice visits. This action recognises the good practice delivered by key industry sector programmes such as LCR 4.0, Onsite Insight (Manufacturing), LCR Activate (Digital & Creative) , Interreg Europe (HELIUM-Health & Life Sciences)
- Improve and increase communication with a wider cross-section of businesses, and provide a coordinated approach to networking with regards to key opportunity



sectors, such as Professional Sefton and Export Sefton aimed at developing collaborative activity, learning and innovation. This action seeks to encourage cross-sector networking and encourage market diversification in the supply chain. This work has also led to the creation of structured networks and innovation exchanges.

- Ensuring Sefton's businesses are fit for the future and aware of the potential opportunities presented by transformative technologies. For example, supporting businesses to identify the transformative power of digital as a cross-cutting theme across all sectors, including marketing and sales, supply chain opportunities, accounting, production processes such as 3D printing. Digital requirements should form a key component of the initial diagnostic undertaken with businesses, and targeted support provided where there is scope to drive innovative activity and productivity gains, particularly in key opportunity sectors and scalable companies.
- Mapping Sefton's social enterprise business base to pinpoint opportunities for growth and develop a support package to help them to grow and access new opportunities, including those presented by public sector reform.
- Supporting growth in new markets and supply chains including support for businesses on the implications of Brexit, and increasing the number of exporting businesses and value of exports in Sefton

Delivery Tactics

- Liverpool City Region seeks to produce a step change in the scale of enterprise and business activity, recognising that a healthy business base with strong business growth is crucial to increasing economic performance and competitiveness. The LCR LEP has made business start-ups and development of an entrepreneurial culture a key priority of the LCR Single Growth Strategy and ESIF Programme (2014-2020) and has developed a new Enterprise Strategy Framework which serves as a platform for future delivery. The Framework establishes key factors such as improving enterprise culture; more new businesses; business survival and growth; and workforce development. These align with Sefton's priority action areas and provide a supportive policy framework to aid delivery. These include:
- The LCR Business Growth Hub has been identified by the Department of Business Energy & Industrial Strategy (BEIS) as an exemplar initiative with its focus on local knowledge and delivery structures. The Local Growth Hub supports all businesses, but has a particular focus on the SME market. InvestSefton is the Local Growth Hub Broker in Sefton and provides 'light touch' support to start ups and new businesses including a triage service, initial advice, brokerage, business premises search and



managed referral to the Enterprise Hub. 'One to Many' events for individuals seeking to start their own business are also delivered.

- The LCR Enterprise Hub provides a complementary ERDF start up programme, delivered by a consortium of providers led by TWO (The Women's Organisation) and Liverpool Community College. The programme offers pre-start up and business start-up support to aspiring entrepreneurs. Support is targeted at young people; female entrepreneurs; social enterprises; rural; disadvantaged and under-represented groups.
- InvestSefton is the council's business growth, enterprise support and inward investment service. It leads on and supports economic growth in the borough. It delivers the LCR LEP/Government funded Sefton Growth Hub providing a single point of contact for businesses of all types and sizes. The team includes nationally accredited Business Advisers who provide advice; guidance, brokerage and diagnostic support on areas such as business planning, cashflow forecasting, accessing finance including help with financial applications, as well as providing access to and advice on legislative matters such as business rates, waste, and planning. The team also offers a free business sites and premises search service for businesses seeking to start, grow or locate in Sefton.
- InvestSefton is the city-region strategic lead for the LCR ERDF Business Growth Programme. It also delivers the Sefton element of the Programme which provides eligible SME's, who are disengaged or confused with current business support provision, with the capacity and support they need to grow and prosper. The project serves as a bridge between start-up and more bespoke, intensive or specialist support typically supplied by the private sector and which provides participating SMEs with a dedicated Business Growth Adviser. The Advisers provide diagnostic, business planning and brokerage into other specialist/commercial support
- The LCR Business Growth Hub also serves as a the primary gateway for providing sector support for Sefton businesses ensuring that they are aware of and aligned with City Region wide initiatives such as LCR 4.0, (Manufacturing) LCR Activate (Digital & Creative) as well as national programmes like Innovate UK and the Catapult Network. The Sefton Growth Hub (delivered by InvestSefton), working closely with partners at the LEP, will use existing and proven communications platforms to encourage manufacturing businesses to address productivity challenges as well as exploring new export and trading opportunities post-Brexit.
- InvestSefton provides access to finance support to businesses working closely with banks, and a range of financial institutions including Merseyside Special Investment Fund (MSIF) who provide a wide range of funding to businesses in the Liverpool City



Region and surrounding areas. Funding is available from £500 up to £2 million+ for a variety of business needs including start-ups, expansions, acquisitions and management buy outs/buy ins.

- The New Entrepreneurs Allowance programme which provides financial support and advice to help start or grow a business for people in receipt of certain benefits.
- Sefton Economic Forum is the key network business event for Sefton Council that is held twice a year. The forum provides a platform for engaging businesses on a wide range of economic development topics and opportunities for networking between business owners. The forum also hosts a Growth Hub marketplace where businesses can see what help and support is available across the city region.
- Internationalisation support including InvestSefton's Brexit Group and Sefton Export Network are also key business engagement initiatives. The latter has played a key role in Sefton's input into the LCRs International Business Festival activities.
- Continue building relationships with key business membership organisations such as Liverpool & Sefton Chambers of Commerce, Federation of Small Businesses and Southport BID to help align engagement activities in Sefton and ensure the views of businesses are fully represented.

How will this action area contribute to inclusive growth?

- 4.36 Sefton needs to ensure residents are better connected to job opportunities to facilitate inclusive growth. A focus on educational attainment and a skills and training offer, aligned to key sectors of opportunity and cross cutting themes such as digitisation will support this. Sefton's residents need to be part of the solution, and encouraging a positive attitude to entrepreneurship and developing core attributes such as leadership and management skills and a willingness to engage with and adopt new technologies as a driver of change.
- 4.37 Sefton needs to target geographical areas of need to align resident skills and entrepreneurial appetite with key sectors of opportunity. E.g. Enterprise Hub advice and support, business clinics.
- 4.38 Sefton needs to ensure jobseeking residents are better connected to employment opportunities arising from new business growth in the borough. A focus on dovetailing the employer offer through various LCR and ESF programmes with available business growth support will support this. InvestSefton work closely with Sefton@Work to draw attention to where employment opportunities are being created so they can support businesses with their recruitment needs and maximise the take-up of jobs by Sefton residents



3: Securing new inward investment

4.39 Sefton will endeavour to create more jobs which are higher value and make a more productive contribution to the local economy. Securing new investment (domestic or overseas) is part of the solution, which alongside efforts to create and grow local businesses, will help to increase employment and GVA. Sefton has a compelling proposition to present, linked to key opportunity sectors and major projects. However, the critical ingredient to 'sell' is the availability of quality sites and premises, 'shovel ready', and in the locations where businesses want to be as well as a local pool of skills and talent to tap into. The lack of available supply is a significant barrier to realising the inward investment opportunity.

Objective

4.40 Sefton will secure new inward investment targeting higher productive sectors. As public sector employment has shrunk, private sector employment has failed to make up the shortfall, leading to an overall net decrease in the number of jobs and a decrease in substantive positions capable of offering progression and sustainability in terms of earnings and employment security.

Priority Actions

4.41 Sefton needs to prioritise actions which:

- Ensure Sefton is well positioned to maximise the benefits from emerging Liverpool City Region proposals for a Single Investment Agency , Local Growth Hubs and post December 2018 European Structural Investment Funding. It needs to build on the existing LCR approach to inward investment particularly outbound national and international activities.
- Present a compelling investment proposition, linked to the LCR offer and showcasing the opportunity which exists in Sefton, including Labour Market Intelligence, sites and premises offer, supply chain activity, business support etc.
- Draw investors to spatial opportunities which the area development frameworks and investment strategies in Southport, Dunnings Bridge Road, Bootle Town Centre and Crosby help to support.
- Make it easier to do business in Sefton through a 'business friendly' approach across



the Council's business facing and regulatory services which provide a more professional "front door".

- Embed existing Sefton companies and investors with HQ functions located elsewhere by developing strong relationships, and bespoke solutions to ensure their needs are being met in the borough.
- Provide networking opportunities, working with LCR partners where appropriate, to realise cross-sector and supply chain market potential.
- Maximise local employment opportunities from new investment by encouraging investing businesses to demonstrate social value and corporate social responsibility through the pursuit of direct dialogue focused on local employment, training and supply chain gain.
- Link Place Marketing activities to emerging strategy for Sefton Visitor Economy to provide a diverse range of offers to attract new investment. E.g. Arts & Cultural, Retail, Leisure and Food and Beverage.

Delivery Tactics

4.42 The priority action areas need to align with existing and planned activities and use these as a platform to ensure Sefton's needs are met:

- InvestSefton delivers the current ERDF Place Marketing for Investment contract and also leads the LCR Investment board. The team supports new investment in Sefton through relationship management with developers, investors and existing major employers. This work is linked to LCR initiatives including the International Business Festival 2018 and Internationalisation.
- LCR Investment Board and place marketing which provides the inward investment proposition and activity across growth sectors needs to provide a platform to emphasise Sefton's unique assets
- Maximise Northern Powerhouse funding secured by LCR LEP to introduce Key Account Managers to work with Sefton's foreign owned businesses. Also, target resource to help continue building relationships with Sefton's major employers, investors and key decision makers to ensure the capture of new growth in the borough.
- 'Business Friendly Sefton' initiative which seeks to align Council business facing services with the economic strategy, with the aim of making the council 'easier to do business with' and 'treating businesses as valued corporate customers'.
- LCR Enterprise Executive Board and Sector Groups in place to develop key sectors



including manufacturing, energy and environment, Financial, Professional and Business Services, Digital and Creative, Life Sciences, Visitor Economy and SuperPort.

- Use of Memorandum of Understanding between strategic partners such as that being developed between Peel Ports and Sefton Council to help maximise local business and employment opportunities. This Collaboration Agreement covers Procurement of Local Goods and services, targeted recruitment and training, and integrated business support.

How will this action area contribute to inclusive growth?

- 4.43 InvestSefton work closely with Sefton@Work to draw attention to where employment opportunities are being created so Sefton@Work can endeavour to support investors with their recruitment needs and maximise the take-up of jobs by Sefton residents. This needs to be strengthened to ensure a line of connection between investments delivering jobs (opportunity) and targeting jobs to those of all ages who need them in the community. This requires a staged approach to planning, procurement and commissioning and a policy to support this.

4: Investing in education, skills and employability

- 4.44 Sefton's talent pool provides the means by which Sefton will secure economic growth and prosperity. Weaknesses in the current supply of labour are constraining Sefton's competitiveness, impacting on the ability of the borough to participate in higher value activity which tends to be characterised by a higher level of skill, enterprise and innovation. Businesses cite skill shortages and gaps as barriers to growth, and the anticipated scale of expansion and replacement demand in key opportunity sectors highlights the imperative for addressing these labour market deficiencies.
- 4.45 Sefton has a cohort of residents who are disconnected from the labour market, many of whom would like to work if they could, but face barriers to participation which put them at most risk of poverty and the negative consequences of economic shocks. There is a high prevalence of people of working age facing ill health and complex factors which have affected their capacity, skills and resilience, leaving many younger people and children being raised without exposure to positive working role models. Many residents are increasingly exposed to precarious forms of employment and can find themselves stuck in a low pay-no pay cycle where dependence upon welfare benefits continues for extended periods.
- 4.46 Sefton has a generally good level of education attainment and progression to HE, but there is a need to harness this capability and retain higher level skills and graduate talent. The



Sefton Economic Assessment identified a trend of underemployment, for example Sefton residents with graduate qualifications falling back into lower skilled/lower paid jobs which can displace those less qualified from their roles and constrain the potential of higher skilled individuals to drive productivity gains in the borough's economy.

- 4.47 Conversely, Sefton's business mix is such that there is less demand for higher-level skills than there could be, and this feeds back into resident labour force. A lack of opportunities for higher skilled jobs within Sefton may be a barrier to people aspiring to or seeking out the education and training to improve their skill levels.

Objective

- 4.48 Sefton needs to invest in its future talent pool to ensure young people get a good start in life and can access sustainable employment opportunities offering progression pathways to higher levels of pay and job satisfaction. Education-industry engagement needs to be facilitated to match the supply of skills to employer demands, and lifetime learning needs to be embraced to provide opportunities for reskilling and upskilling to meet changing skill needs.

Priority Actions

- 4.49 The types of action to pursue in this area include the following:
- The current system for careers and guidance for young people is recognised nationally as a weakness. Young people need to be inspired to make the right choices aligned to their interest areas and opportunities for employment. For example, key sector factsheets would showcase employment opportunities in Sefton and the LCR and provide a forward-facing perspective in anticipation of major projects and investments coming forward. Careers inspiration needs to begin at primary school and be embedded in the curriculum with active employer involvement. Sefton's young people need to be empowered to raise their aspirations and open their horizons to future opportunities and work should be undertaken in partnership with schools to ensure every young person has access to quality careers guidance provision that aims to maximize their potential
 - Facilitate a demand-led education system which responds to current and future employer needs and provides a quality education experience which inspires and enthuses the workforce of the future. A quality post-16 education and training offer will help to retain learners in the borough and provide them with a clear progression pathway to higher education, training or employment. Opportunities to provide a specialised offer aligned to priority sectors, such as the Port Academy's service to the



maritime cluster, will provide a strong focus on business needs.

- Grow apprenticeship participation, recognising the barriers to participation by employers include business composition (sector and size) impacts on both the quantum of places available and the quality of the apprenticeship experience from a learner perspective. In addition to targeting young people, there needs to be focus on older workers at risk of redundancy due to the changing shape of skills need, which presents a reskilling requirement. Interventions such as Apprenticeship Ambassadors, supporting companies with the introduction of the Apprenticeship Levy, access to AGE grants, and careers inspiration materials linked to key sectors of opportunities and vocational pathways will facilitate growth. Sefton Council's own successful apprenticeship scheme has provided many work placements and work experience opportunities, and can be an exemplar for other partners elsewhere.
- Supporting transition into adulthood in recognition that young people at Year 12 and 13 often struggle to transition successfully into employment. This action would align the practice derived from the Youth Employment Initiative, which has personalised budgets to help young people design their own pathway, with information advice and guidance provision which is currently contracted out to an external provider. This will provide young people with a clear line of sight from 16 to 19 year olds to facilitate a successful journey into employment, education and training.
- Sefton needs to support the retention of graduates within the borough and the LCR. Opportunities to work with employers to provide placements, internships, work experience and inspiration activity will develop the work readiness of graduates and help to embed them in local firms in roles which recognise their capabilities at an appropriate level.
- There needs to be a clear line of connection between investment delivering jobs within the borough, and a policy aimed at targeting jobs to those who need it. This requires internal procedures to be in place to enable a staged process to connect opportunity and need through the planning, procurement, and business support. Sefton needs to create an environment where recruitment of local 'talent' is the best and easiest solution for business.
- Sefton needs to be confident and clear in its intention to be the home of responsible businesses. It needs to work closely with investors to help them understand their corporate social responsibility to their staff and to the communities within which they are/hope to locate. This means being bold in its ask of employers to invest in their communities, for example through taking on apprentices, or working with the ILM project to provide valuable work experience and paid employment to unemployed



residents. Through providing a supportive business environment Sefton can help businesses to understand what 'good' looks like, helping businesses to grow and enable their investment in staff to provide more sustainable and better paying jobs.

- Sefton needs to proactively tackle the interlinked issues of poor health, employment and income which are driving deprivation in the borough. Support for health, households and work need to be triangulated to provide a holistic intervention which addresses the cause and effects of worklessness. Policy interventions such as the new Work and Health programme, Households into Work Pilot, Mental Health and Employment Task Group, and devolved funding at the city region level provides a platform for change in Sefton.
- Sefton needs to capitalise upon its track record of effective partnership delivery on employment and skills by continuing its work to support voluntary and community sector delivery, learning lessons from the experience of delivering programmes centering upon the congruence of public sector responsibilities such as Sefton Turnaround, support for parents through Early Help interventions, and the continued engagement with skills providers through Further Education, adult and family learning.

Delivery Tactics

4.50 The priority action areas will align with initiatives already underway, including:

- The recommendations of the Area Based Review for a single Sefton College. Merging four institutions through a two-stage process will help to shape the future curriculum to meet priorities for growth, higher level skills, and encourage greater specialisation. For example, the Port Academy Liverpool which offers specialised support to the maritime cluster. There will be a focus on growing Level 3 participation in support of skills for priority sectors including the visitor economy, engineering, IT and digital, and health and social care. A 'Sefton offer' is planned for higher education, providing local progression routes and increasing higher level skills in priority sectors, including development of higher level apprenticeships.
- Sefton@Work providing information, advice and guidance to Sefton residents aged 16+. Sefton@Work deliver the ESF 'Ways to Work' programme delivering employment advice, guidance, job preparation skills and paid work placements to workless residents. This includes a targeted 'Youth Employment Initiative' at those people under 29 years of age who have no work experience or little work history and provides access to a personalised budget to provide support in accessing training or employment. Through the Intermediate Labour Market (ILM) programme Sefton Council can provide grants to employers to take on local unemployed people in a training capacity whilst paying them a real wage and gaining valuable work



experience. Other initiatives include the Sefton Turnaround project; Carers in Employment initiative; Leaving Care; Think Differently, Cope Differently; L30 Neighbourhood project.

- Sefton Apprenticeship Scheme, providing support to local employers to provide apprenticeship places, including grants.
- An external provider delivers a targeted careers information, advice and guidance and tracking service on behalf of Sefton and targets those young people not in employment, education or training (NEET) or at risk of becoming NEET.
- Targeted Post-14 activity aimed at those at most risk of exiting from education and training at a young age (NEET prevention). However budgetary pressures are making it difficult to execute statutory and non-statutory responsibilities.
- Sefton Community Learning Service has a strong emphasis on preparing individuals towards employment, working alongside Jobcentre Plus work coaches and Sefton@work to deliver employability programmes for their clients.
- The Households into Work Pilot will launch in 2017/18 for a two-year period and will test new ways of working with families and households across the LCR. This will build on other family-based initiatives such as Sefton Turnaround and the Child Poverty Pilot.
- Sefton Mental Health Group has a strong focus on the development of employment opportunities for people with mental health issues.
- As part of the Liverpool City Region Local Growth Deal with Government, the City Region have been awarded £3.05m across 2016/17 and 2017/18 to deliver a Skills for Growth programme of training support to businesses including independent and impartial advice through a Brokerage Service working across the Liverpool City Region.
- Sefton needs to ensure that the Local Growth Hub becomes a key focus for engaging businesses across the LCR Skills For Growth agenda.

How will this action area contribute to inclusive growth?

- 4.51 Inclusive growth principles are at the heart of these recommendations, with a focus on the skills and employability of Sefton's residents and facilitating a match between local labour supply and the demand for labour presented by local firms and future investment plans. Sefton will pursue a strong Corporate Social Responsibility (CSR) agenda with businesses and investors alike and encourage them to support growth and prosperity in Sefton.

5 Reconfiguring public services and community led delivery

- 5.1 With public sector organisations, including the Council, under significant pressure to find



new ways of delivering local services, there is both a need and an economic opportunity to stimulate the growth of new enterprises led by Sefton's communities.

Objective

- 5.2 To build a critical mass of self-sustaining community-led enterprises delivering services and running community assets in Sefton, which are creating jobs and bringing new social investment to the borough.

Priority Actions

- 5.3 **Identify assets for future community management and ownership:** Sefton can already point to good examples of its communities taking on responsibility for managing local assets. Action that starts by supporting communities to run such assets is a pathway to community ownership and enterprise, and the Council with other public sector organisations need to plan ahead for future assets to be transferred in this way.
- 5.4 **Build community capacity:** Lessons from elsewhere show that up-front investment to build the capacity of communities to form enterprises and run services is essential. Action should include supporting the capacity of groups and individuals to organise themselves to manage assets and form enterprises which might provide community services.
- 5.5 **Support the development and growth of new local community businesses:** Sefton Council and its partners will need to work with new social enterprises to ensure they have access to the ongoing advice, guidance and resources that enable them to operate sustainably in the long-term. Sefton Council is already seeking to support this sector through dedicated Business Advisers.
- 5.6 **Support the development of public enterprise and Council spin-outs:** Part of the process of public service reform is to generate new enterprise directly from the Council's activities.

Delivery Tactics

- 5.7 Steps are already being taken by Sefton Council and its partners including:
- Further embedding social value into Council planning, commissioning and procurement, and working with other public sector organisations to develop a consistent approach across the borough.
 - Continuing to support Enterprise Hub activities which are bringing together start up support and partner organisations including Community Trusts and which can assist in establishing social or community enterprises.
 - Identifying and where necessary supporting the process of securing social finance



for investment in new types of community enterprise. This might build on existing funds already operational or on developing the case for new funding bids.

- Working with organisations already active in Sefton and Merseyside (for example, Public Services Lab) to drive forward service reform and create opportunities for new social and community enterprise.
- Running pilot initiatives and then rolling them out where they have been successful.

How will this action area contribute to inclusive growth?

- 5.8 This action area is at the core of inclusive growth. Private-sector led job and business creation alone cannot provide the step-change in economic engagement that Sefton is aiming for. Enabling new types of enterprise to be formed and to succeed within the borough will help retain more of the benefits of growth for Sefton. It will enable the borough to become more economically resilient and self-reliant in the face of significant financial challenges.

6: Generating new sources of finance to support growth

- 5.9 Sefton Council, along with many public sector organisations, faces unprecedented financial challenges from the impacts of public sector spending constraints. This means that the Economic Strategy Framework will be delivered in a climate when the financial and personnel resources available to the Council and its partners are scarce. Developing new mechanisms to secure finance to reinvest in the borough, and creatively working with partners to lever in private and public sector investment are areas for action in their own right.

Objective

- 5.10 To generate new sources of income and external resources to invest in Sefton, and ensure that these resources are sustained in the long-term.

Priority Actions

- 5.11 The financial constraints Sefton Council and its partners are already operating under have triggered new thinking about how to generate investment resources. This has culminated in the production and adoption of a range of Investment Frameworks to cover key priority locations across the borough. The Council is also at an advanced stage to consider the establishment of a wholly owned Housing Development Company to drive forward development on Council owned sites. This is a good example of the type of action that should be pursued. Other types of action should include:



- 5.12 Exploring and developing new partnerships with the private sector: The Council has recognised that engagement and facilitation with the private sector will be central to delivering new development and regeneration in the borough. It will need to continue and extend this activity, identifying and then supporting preferred development partners for key sites, and potentially establishing joint ventures or other forms of investment mechanism to secure private sector investment alongside Council resources.
- 5.13 Higher value housing development at target locations: Sefton Council should ensure that a good proportion of new housing development is large sized (4 bedroom +) housing stock, a segment which Sefton's Economic Assessment is comparatively under-represented at present. Net increases generally in Sefton's housing supply should in turn increase receipts of Council Tax income, but increases in larger and higher value homes would be expected to generate higher revenues. However this also needs to be balanced with the need to provide affordable housing, for those households unable to access higher value market housing.
- 5.14 **Making more of existing assets, and investing in new Council owned commercial assets:** Additional sources of income for the Council could be generated by investing to improve existing commercial assets held by the Council (for example, business premises) where upgrading could yield higher levels of rental income.
- 5.15 Selective investment in larger commercial assets – including land and commercial property – also has the potential to create new income streams for reinvestment, or from the sale and development of land. The Council's financial investment strategy should identify both short and longer term opportunities for this type of asset investment.
- 5.16 **Strengthening its case making for external investment:** Sefton faces increased competition for European, national and city region level investment. This puts extra emphasis on the need to develop business cases for investment that are clearly identified as strategic priorities for the borough backed by compelling and robust evidence to justify funding.

Delivery Tactics

- 5.17 The emphasis is on Sefton Council and its partners to:
- Continue to explore how other local areas in the UK and perhaps overseas have been successful in creating and boosting their incomes through new investment.
 - Open-up new dialogue with developers and investors for specific sites and development schemes, and encourage new entrants into Sefton.
 - Push forward with new thinking about investment risk taking and its strategy for



generating sustainable new income streams in the long term.

- Further embed commercial thinking about its assets and development priorities into the Council so that it is integrated across its services and activities.

How will this action area contribute to inclusive growth?

- 5.18 Securing finance will be essential to delivering new development in Sefton and to regenerating its towns. Sefton Council and its partners are working more closely with the private sector to facilitate new investments. Better enabling the Council to generate its 'own' resources will increase the options available to it to pursue key regeneration priorities and to invest in supporting programmes which widen the economic opportunities available to its residents.
- 5.19 Success in this action area also has the potential to generate income to Sefton Council for re-investment in the wider range of public services to support Sefton's residents. There has been growing use by local authorities of returns generated from land and property development to feed general funds at a time when many are facing further real term reductions in core funding.

7: Repositioning and reprofiling Sefton

- 5.20 Sefton has been held back by external views of the borough and its towns that too often focus on the negative. It is not sufficiently recognised for its many strengths, and for what makes parts of the borough particularly attractive places in the Liverpool City Region. The social and economic challenges it has faced in the past 20-30 years have also negatively affected people who live and work in the borough. Restoring or encouraging a renewed sense of pride in the place was amongst the main themes of the Imagine Sefton 2030 initiative. Investment and action which delivers a new and improved product in Sefton must provide the springboard to reposition the borough and change external and internal perceptions of it.

Objective

- 5.21 To change internal and external perceptions of Sefton so that the borough's strengths, qualities and ambitions are increasingly recognised and there is a shift away from negative perceptions.

Priority Actions

- 5.22 The types of actions for this area identified in the Economic Strategy Framework cut



across several action areas described above, including those centred on development, regeneration and inward investment. New buildings, facilities and attractions, coupled with targeted improvements in Sefton's public spaces will all help to change perceptions of the place.

- 5.23 Invest Sefton has already put in place a promotional strategy which targets inward investors and connects physical investment (sites and infrastructure) to business support and evidence about what makes the borough a good place to invest, work and live in. Efforts to reposition and reprofile Sefton will centre on this type of activity but could also include the following:
- 5.24 **Generating positive, profile raising material out of new development:** Sefton Council and its partners should seek opportunities to externally showcase new and innovative development and regeneration in the borough. This should focus particularly on Bootle and South Sefton. For example, modern and high quality canal-side housing development would be something new in Bootle and the chance to encourage people to think differently about the town.
- 5.25 **Establishing Sefton as an excellent place to do business:** Activity should focus on the way Sefton Council works positively with businesses and the services and support it provides with its partners. At the same time, Sefton should be confident about working with businesses to promote social value in their activities in the borough.
- 5.26 **Reposition Bootle as the northern gateway to Liverpool:** The major programme of commercial, leisure and housing development under way in North Liverpool, including the proposed development of a new dockside stadium for Everton FC, should be used as the opportunity to establish the town as Liverpool's northern gateway. Coupled with the opportunity to redevelop central Bootle with the Council's purchase of The Strand, the Council and its partners should make the most of the opportunities this will create to raise the town's profile.
- 5.27 **Developing a new visitor economy strategy:** With Sefton's visitor destinations already a key investment priority and with an active place marketing strategy, a new visitor economy strategy would give the opportunity to better mark out its attractions as a destination and its role in the wider visitor economy of the Liverpool City Region. The redevelopment of Liverpool's northern docklands area, new investment in leisure attractions in Southport and improvements to facilities along Sefton's coastline provide the platform. The borough could make more also of its established events programme and look to deliver new events.
- 5.28 **Secure national recognition for its approach to inclusive economic growth and regeneration:** Looking ahead, Sefton Council could aim to be winning awards for new



development and regeneration, enterprise and employability initiatives that will happen over the next few years.

- 5.29 **Clarify Sefton’s key strengths, assets and opportunities and distil this in to a clear and concise outbound message.** Build greater capacity and connectivity around assets and opportunities, connecting physical assets and hard infrastructure with soft infrastructure, R&D and Education.

Delivery Tactics

- 5.30 There is no need to reinvent the wheel in this action area. Sefton Council and its partners in the Liverpool City Region are already investing in activity and organisations whose functions include promoting the borough and widening its external appeal. This means:

- Collaborating with developers to exploit opportunities to highlight new development activity in the media and with investors outside the borough.
- Using the Council’s influence with public and private sector partners to ensure that the key messages about Sefton’s strengths and ambitions are consistently understood and used in their promotional activity.
- Working with the Liverpool City Region Destination Management Organisation to ensure Sefton is clearly positioned in the LCR’s visitor economy strategy and destination management plan.

How this area will contribute to inclusive growth

- 5.31 One of the key aims of this action is to help engage more of Sefton’s communities in its economic future. Although it is hard to measure, a borough which is bold about its future and the positive changes happening should see the impacts of this change filter through to its residents and businesses.
- 5.32 Successful action should see Sefton develop a stronger and more positive external profile, an outcome which will be integral to attracting new residents and new inward investment. Both will be key factors in the extent to which Sefton’s economic strategy delivers growth that improves the lives of its resident communities.



6 Measuring Success

- 6.1 It is important that Sefton's captures the change that results from the delivery of its new Economic Strategy Framework. Monitoring performance will help ensure that action and resources are directed where they deliver the maximum benefit, and that activity is adapted where performance measures point the need for a different course to be followed. Measures of success need to be clearly understood by Sefton's communities and businesses if the borough is to sustain commitment to its growth strategy over the next 10-15 years.
- 6.2 This section provides the first draft of a performance framework for the Economic Strategy. The principle is that it captures the full range of impacts of delivering in the action areas described above, combining quantitative and qualitative measures. Those highlighted in **bold** could provide the key measures for the framework.

Economic Measures

Indicator	What To Measure
Employment	Growth target - driven by Sefton employment forecast from Liverpool City Region?
Earnings	Increase in lower quartile workplace and resident earnings; increases in household income?
Economic Activity	Increase in economic activity rate and employment rates
Business Formation	Increase in number of new starts in Sefton and survival rate of new businesses over 1, 2, 3 years; include social/community enterprises; track change in different sectors
Business Growth	Increases in turnover and staffing of micro-businesses and SMEs
Inward Investment	Value of new inward investment in Sefton Growth in number of jobs created by new inward investment
Labour Supply	Growth in number of economically active, working age residents
Productivity	Potentially, use of change in local GVA but caution needed about reliability and value of this indicator
Skills	Increases in resident and workplace skill levels; increase in demand
Education	Higher attainment levels in schools and FE; increase in residents; Reduction in NEET
Training	Increases in number of apprentices/apprenticeships offered in Sefton; increases in number of residents in training; increases in number of training opportunities offered by employers



Visitors	Increases in value of visitor economy and volumes of visitors; increases in town centre footfall and retail/leisure spending in town centres
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6.3 In addition, measures relating to the volume and value of development in Sefton should be part of the impact framework. These measures include:

- Take up of housing and employment land (quantity)
- Change in the stock of housing and characteristics of new stock
- Change in commercial property supply (completions, deals)
- Change in the value of housing land and development values
- Change in commercial land values; change in sales and rental values.

6.4 Finally, indicators relating to improvements in Sefton’s infrastructure should also be part of the performance framework. These could include:

- Improvements to congestion on key routes into and through Sefton. Time savings benefits can be translated into economic benefits.
- Increases in the use of public transport, walking and cycling, capturing modal change and recognising the wider social benefits of reducing car use.
- Number of businesses and residents connected to ultra-fast broadband; number of new starts of digital businesses from within Sefton.

Financial Measures

Indicator	Target
Council Tax income	Change in stock of higher Council Tax band properties; Increase in total Council Tax income generated;
Business rate income	Increases in business rate revenue generated in Sefton – rateable value of premises; total rate revenue generated
Sefton Council income	Increase in own resources generated by Council assets and new investments; increase in funding from external public sector sources
Public sector cost savings	Reductions in the cost of delivering core local services?
Investment yield	Capital growth from investments made?
Welfare costs	Reductions in costs of unemployment and other benefits in Sefton



Wider Social Value

Table 6.3 Measuring Social Value	
Indicator	What To Measure
Well being	Improvements in happiness and well-being of Sefton residents
Health	Improvements on range of indicators linked to economic
Local physical environment	Change in indicators including pride in community; quality of neighbourhood;
Financial inclusion	Measures of residents' financial well-being

Environmental

Table 6.4	
Indicator	What To Measure
Carbon emissions	Progress in reducing or limiting growth of carbon emissions by type of activity
Low carbon sector	Number of businesses in low carbon sector; workforce employed in low carbon sector





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A Consultation Report:

Draft Sefton Economic Strategy



Start date: 8th March 2018

End date: 4th May 2018

Agenda Item 10

Draft Sefton Economic Strategy- A Consultation Report

Executive Summary

Following the production of Sefton's draft Economic Strategy early in 2018, an extensive consultation exercise was undertaken by the Council. The aim of this exercise was to elicit the views of delivery partners, local, regional and national agencies, local businesses and residents across the Borough on how well the Strategy represents a way forward that everyone with a stake in Sefton's future could endorse, as part of our VISION 2030 ambitions.

The consultation received an excellent response with a total of 189 returns received through focus groups, online surveys, telephone contacts and written returns. This is a 65% increase on a similar exercise carried out in 2014. The strategy's focus on Inclusive growth, which encompasses wellbeing, housing and infrastructure helped generate a larger response from residents (49%) and Sefton's business community (30%). There was also a good geographical split with more north Sefton responses (47%) than in 2014.

The vast majority of respondents (91%) across all modes of engagement agreed that our Economic Strategy should focus on the three broad aims of People, Place and Productivity. Although online surveys provided many shorter responses, the more detailed and qualitative information we received came from the resident and business focus groups and these have been vital sources of intelligence in identifying recurring themes that Sefton should focus on for the coming period. The themes that have been expressed more frequently and strongly include the following:

- Sefton's strategy needs to make our relationship with the Liverpool City Region clearer and identify where Sefton's strengths should be at the sub-regional level. This includes a clearer outline of the alignment with City region strategies and policies that will impact our plans for Sefton. e.g. LCR Growth Strategy; Skills, Growth, SHELMA, BEIS Clean Growth; Northern Powerhouse. A similar approach should be undertaken with regard to national policies such as the government's Industrial strategy and Apprenticeship reforms.
- The Council should develop a Business Growth and investment policy; There should be stronger reference to the Council's Framework for Change-Growth objectives
- More support for businesses and startups across the borough; While there is a need to do more to develop business growth and attract inward investment, we should also recognise and celebrate the borough's achievements and successes in these areas
- Stronger reference should be made to Southport Business Improvement District and its links to the Council
- The introduction of focus on Sefton's Digital and Creative sector was broadly welcomed and should be developed into key actions e.g. Business incubators; Investment in fast broadband internet connectivity in town centres
- Many Sefton residents continue to need personalised assistance to enter and sustain meaningful work that lifts them out of the benefit system
- We need to ensure that more effective support is available for our vulnerable young people to help them make the transition from learning in schools or college into sustainable careers
- Sefton should recognise and celebrate good local employers willing to give opportunities to workless residents and vulnerable young people

- Stronger reference to Southport/Manchester rail link and subsequent economic opportunities
- Sefton should focus effort on ensuring that all residents have access to second chance learning opportunities to enable them to achieve their economic potential.
- Improved transport connectivity and better signage in the borough
- Sefton needs to secure the biggest impact in terms of job creation, training and placements for residents through the use of Social Value. This means greater leverage through Planning, Licensing and Commissioning of services across the Council and partners generating opportunity for local residents and businesses
- Stronger reference to Bootle, Crosby and Southport Investment strategies; more information on plans for other areas should also feature e.g. Maghull, Formby
- Stronger reference to Skills development, the Apprenticeship levy, Enterprise and Post 14 student work experience and Further/Higher Education establishments and their role in the Strategy.
- More understanding about what inclusive growth means to those in marginalised groups
- Develop and improve affordable housing opportunities to help retain younger people in Sefton
- Allay any fears over the Planning system becoming too relaxed in efforts to attract new inward investment
- Make better use of Council's own assets including town halls, libraries , CPOs
- Better understanding of third sector opportunities arising from the reconfiguration of public services and community led development
- Being clearer about what our current economic strengths are and what our potential for future development could be

The totality of the response broadly confirms the original Objectives of the Sefton Economic Assessment approved by Cabinet Member in March 2017. These are listed on page 2 under Consultation but can be summarised as follows:

- More higher quality and better paid jobs
- More local people in work, upskilled and working in more productive jobs
- Increased housing and employment land to deliver growth
- Improve Sefton's fast broadband and digital infrastructure; create more digital/creative business and employment opportunities
- Improve strategic rail links and transport infrastructure for future growth including signage; coast and town centres
- Tackle health and well-being challenges in Sefton communities
- Make more of Sefton as a place to live, work, visit and invest in

Key Opportunities & Priority actions

The Focus groups provided insight to both resident and business thinking on the key opportunities and actions arising from the strategy. Key themes included:

- Health & Wellbeing was the top priority for the People First and Strandbyrne groups, noting that good health is a conduit to gaining work, developing skills and increasing job prospects; Education & Skills for people of all ages together with better paid jobs was also a key factor
- Businesses need to better understand the specific needs of those with health

Agenda Item 10

conditions, special needs or disabilities seeking work and how they can be valuable assets to the workplace

- Focus groups with workless residents principally highlighted the reducing support from national sources and their reliance upon locally driven services. This was particularly felt in the context of Universal Credit as “digital by default”
- Having faster internet access also featured strongly in discussions
- Businesses identifies key thematic areas for action; business growth, more sustainable start-ups; new investment and innovation; job creation, skills; physical regeneration in Sefton’s coast, town centres; transport infrastructure and support for the social economy.
- Greater collaboration at city region level; maximising external funds for the benefit of Sefton businesses and residents e.g. European; Devolution monies
- Firm up on agreed priority actions already agreed in Strategy but ensure they are both deliverable and measurable;

Those respondents who have requested to be kept advised of the final version and action plan will also be placed onto a database in line with GDPR. The Strategy is intended to provide a clear framework for action to assist the Council with its ambitions for:

- Business Growth & Investment
- Business Generation & Enterprise Culture
- Sector Development
- Nurturing new Growth Clusters
- Place Marketing and Inward Investment
- Town Centre Investment Strategies and Frameworks
- Post-Inspection Revision of the Local Plan (2017), including Land Availability for Housing and Employment
- Infrastructure Planning
- Strategic Transport Planning and Scheme Identification
- Workforce Development & Skills
- Employability and Inclusive Growth
- Public Sector Reform and the Council’s Transformation Programme
- Social Value in Commissioning and Procurement

Next Steps

Regeneris Consultants has completed the first two phases of the contract (Assessment and draft strategy). Officers are currently determining the level of Regeneris’ involvement in completing the strategy. The key next steps are:

- Present final consultation and key findings report to O&S Scrutiny (Regeneration & Skills) -3 July and Cabinet 26 July 2018
- Update report for Regeneration & Skills Cabinet Member briefing-5 July 2018
- Present final consultation report to Public Engagement & Consultation Panel -14th September 2018
- Revise and produce final Sefton Economic Strategy based on key findings and feedback from the consultation exercise.

- Share final report and key actions with those respondents who have asked to be kept informed
- Build into Council's Action Plan for Growth

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Background

Cabinet Member – Regeneration authorised the preparation of an Economic Assessment and Economic Strategy for Sefton at her meeting of 1st September 2016 and consultants Regeneris were appointed by open competitive tender on 10th October 2016.

In 2016 we carried out a borough wide consultation and asked people what they thought was important for Sefton now and for the future. Over 5,000 people took part and the information helped us to develop the Vision for Sefton 2030. People told us what was important and this included:

- Looking after our town centres
- Having houses that people can afford to buy or rent
- There needs to be more jobs for people

The Sefton Economic Assessment, a factual statement of the borough's strengths and weaknesses, opportunities and threats, was approved by Cabinet Member – Regeneration at her meeting of 9th March 2017. The Cabinet Member also approved at the same meeting the preparation of a draft Strategic Framework for Action, or the building blocks of the Strategy.

The Consultation

The purpose of the consultation was to inform stakeholders of the Council's Economic Assessment, and to consult (seek views) on the draft Framework for Action, the building blocks of the Sefton Economic Strategy.

The focus for the consultation was the actions arising from the findings of the Assessment:

- Creating more higher quality and better paid local jobs

Agenda Item 10

- More people in work and in more productive jobs
- Strengthening the skills base to deliver economic growth and benefit communities
- Deliver new housing and employment land to enable growth
- Improve the digital infrastructure and extend its benefits
- Improve transport infrastructure for growth and sustainability
- Tackle health and well-being challenges experienced by some of Sefton's communities
- Make more of Sefton as a place to live, visit and invest in.

Methodology

A stakeholder analysis was completed, which guided priorities for the consultation. The consultation methods were matched to the stakeholder analysis, and to the level of consultation. Focus groups in the north and south of the Borough were proposed to capture the views and input of job seekers and adults with learning disabilities on the key themes. The consultation plans were presented to the Public Engagement and Consultation Panel on the 17th November, 2017.

The following information resources were used:

- The draft Sefton Economic Strategy
- A standard version questionnaire (on eConsult, hard copy and distributed to libraries)
- An Easy Read version of the questionnaire
- Information to the InvestSefton Business Mailing List (c.3,700), directing them to the on-line questionnaire
- A Business Focus Group
- Focus groups in the north and south with Sefton@Work clients
- A Focus group with StrandbyMe attendees
- A Focus group with People First (Adults with learning disabilities)
- Information on the Sefton Council website and intranet
- Information on social media

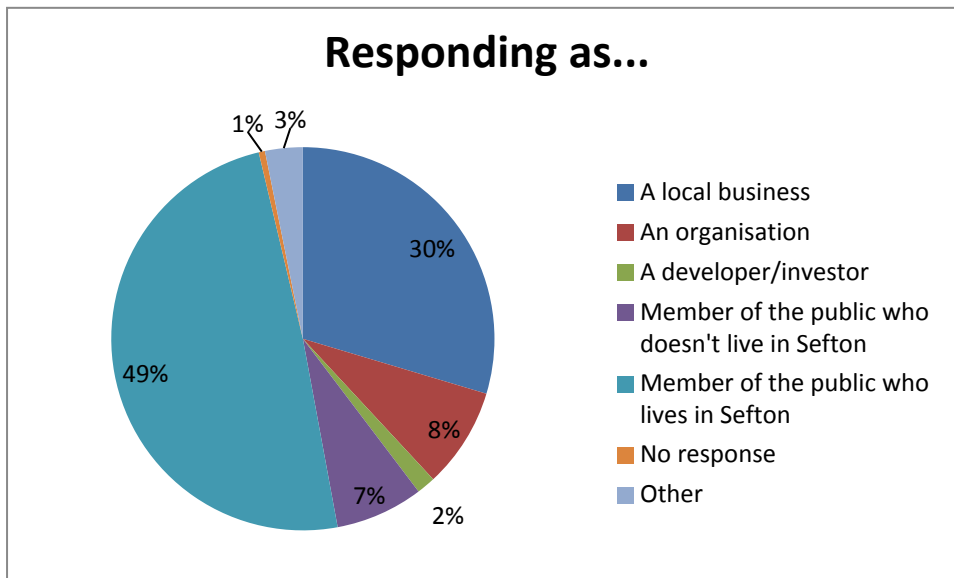
The Results

Questionnaires

Between 8 March and 4 May 2018, 189 questionnaires were completed (164 on line; 24 of these were Easy Read and 1 standard hard copy). It should be noted that whilst 189 people started to complete the questionnaires, some were only partly completed. To comply with Data Protection, all questionnaires, whether on-line or hard copy and whether a standard version or Easy Read, had a Privacy notice outlining the reasons the data was being asked for and what would be done with it afterwards.

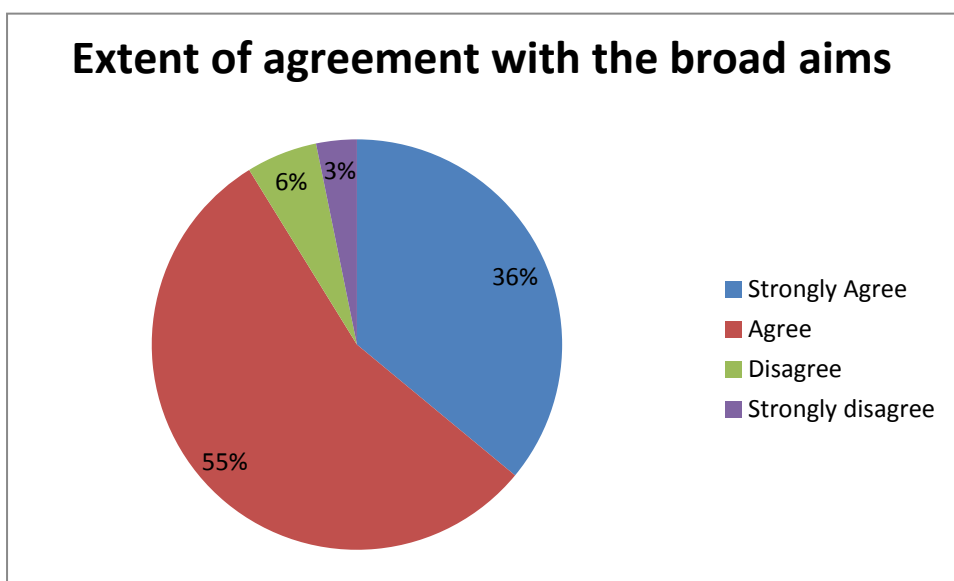
Questionnaire results

1. Who responded?



The above graph shows that the two main groups of people who responded were members of the public who live in Sefton (49%) and local businesses (30%). It should be noted that this is actually an increase of 65% on the 2014 Sefton Economic Strategy consultation. Strategy consultations are not renowned for attracting large responses particularly at a time when there are other competing consultation exercises across the city-region. However InvestSefton, Sefton@work and the Consultation and Engagement Lead undertook a range of follow up activities and focused events to help increase interest and capture more qualitative data.

2. To what extent do you agree or disagree with the three broad aims (People, Places and Productivity)?



The above graph shows that of the 125 people who completed this question, **91% either**

Agenda Item 10

agreed or strongly agreed with the three broad aims of the draft Sefton Economic Strategy. This was reinforced at the focus groups with residents, stakeholders and businesses.

3. Comments – 39 comments received.

The comments were broad and wide ranging; consequently it is difficult to glean any dominating key themes. More qualitative information came from the focus groups in Bootle and Southport in a face to face setting when discussing key opportunities. While the overwhelming number of respondents agreed with the broad aims, some of the comments received did provide a number of shared views which are summarised below:

People

- Local jobs, linking employment to health and well being
- Apprenticeship levy and what it can bring to the area
- Strategy needs greater alignment with Liverpool City Region Skills for Growth strategy
- Strategy appears 'too off the shelf'.....'repetitive and ambiguous in places'
- Strong focus on Inclusive Growth but need to understand more about issues faced by those from marginalised demographics
- Post 14 students should have compulsory work experience with businesses, schools should not have to identify businesses themselves
- There should be more places like Sefton@work
- Housing needs to be more affordable; Bootle and South Sefton are low income areas so need affordable housing and to refurbish existing housing stock/vacant properties
- Resurrect Neighbourhood Action Groups to allow greater control of budgets at a local level

Places

- Concern over planning system becoming too relaxed in order to attract industry
- Weak links to Liverpool City Region and national policies; UK Industrial strategy; SHELMA; LCR Growth strategy, Northern Powerhouse; BEIS Clean Growth Strategy
- Digital & creative sector welcomed and could be transformational for Sefton; need to attract this type of investment/business and develop supporting infrastructure e.g Investment in internet connectivity in town centres
- Strategy seen as bold and innovative
- Bootle, Crosby and Southport are distinct areas , each needing a markedly different approach
- More support to attract new investment and business growth
- Southport's retail ,leisure and tourism issues/opportunities raised several times e.g. Businesses closing; low cost HMOs diluting the availability of beds servicing the conference and tourism market
- Have we looked to other areas for inspiration? e.g. Teeside? Haslemere? Harrogate?
- The Southport to Manchester rail link and subsequent economic

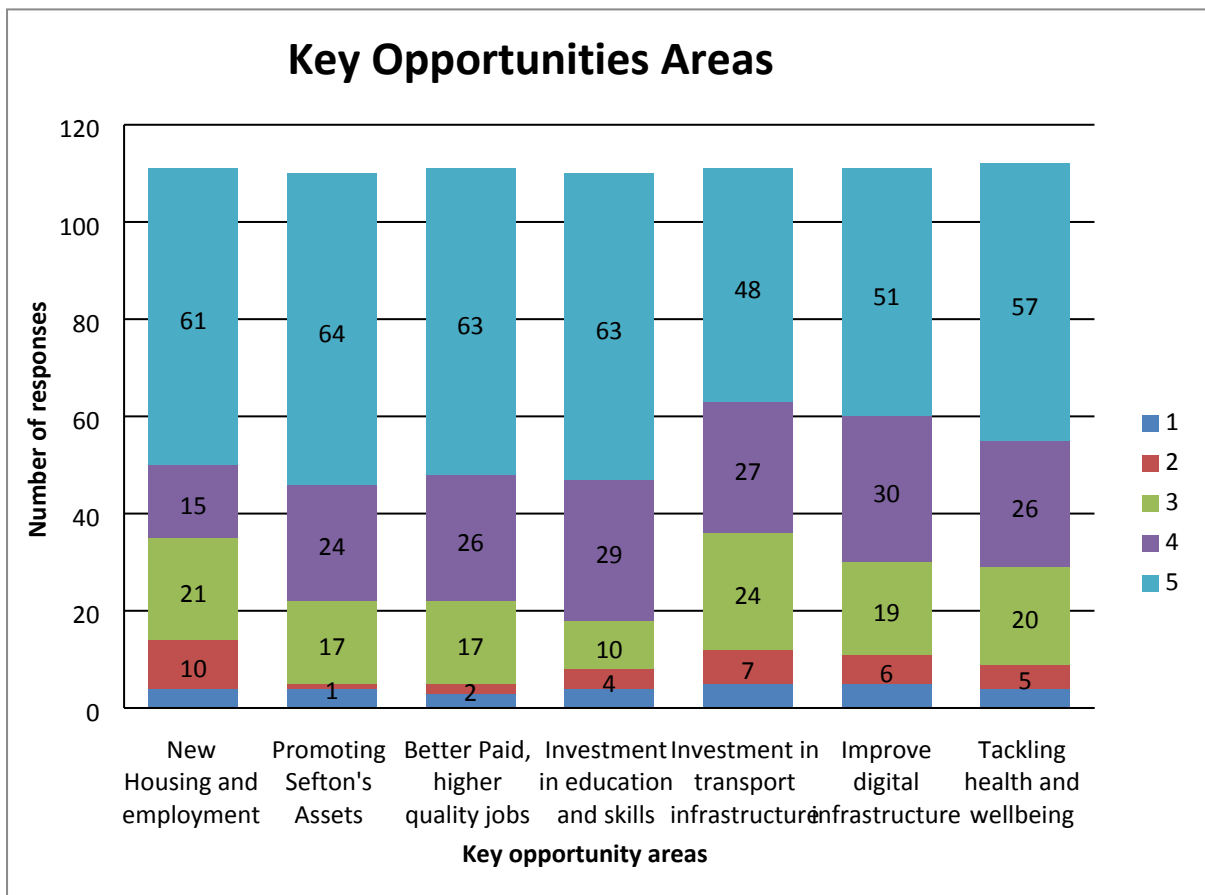
- opportunities and benefits arising from this is not made clear
- Transport connectivity, better signage, entry and exit routes to the borough and address parking issues in town centres

Productivity

- Council needs a policy on more support to attract new investment and business growth
- Need to focus on growth businesses to create new jobs
- Greater alignment required to Liverpool City Region strategies and plans
- Greater focus on Sefton's key and important sectors
- ..."Strategy is very expansive, each area is important but the ability to deliver across all simultaneously will prove elusive"
- More focus on business start-ups and digital/creatives
- More support for skills development
- "We have had great support from InvestSefton at a local level but wider support and brands are too confusing"

A full list of the comments can be found at Appendix 1

- How important are the Key Opportunity areas? (1 not important – 5 is very important).



Agenda Item 10

The above graph shows the seven key opportunity areas identified in the draft Sefton Economic Strategy. Participants of the survey were asked to rate the 7 areas, with 1 being not important to 5 being very important – each rating of 1 – 5 is identified by a colour (legend on the right-hand side).

The columns show for each opportunity area the number of people who rated that opportunity between 1 – 5, for example, 61 people ranked 'New Housing and Employment' as a 5 – being very important to them. All seven areas are deemed very important (rating score of 5).

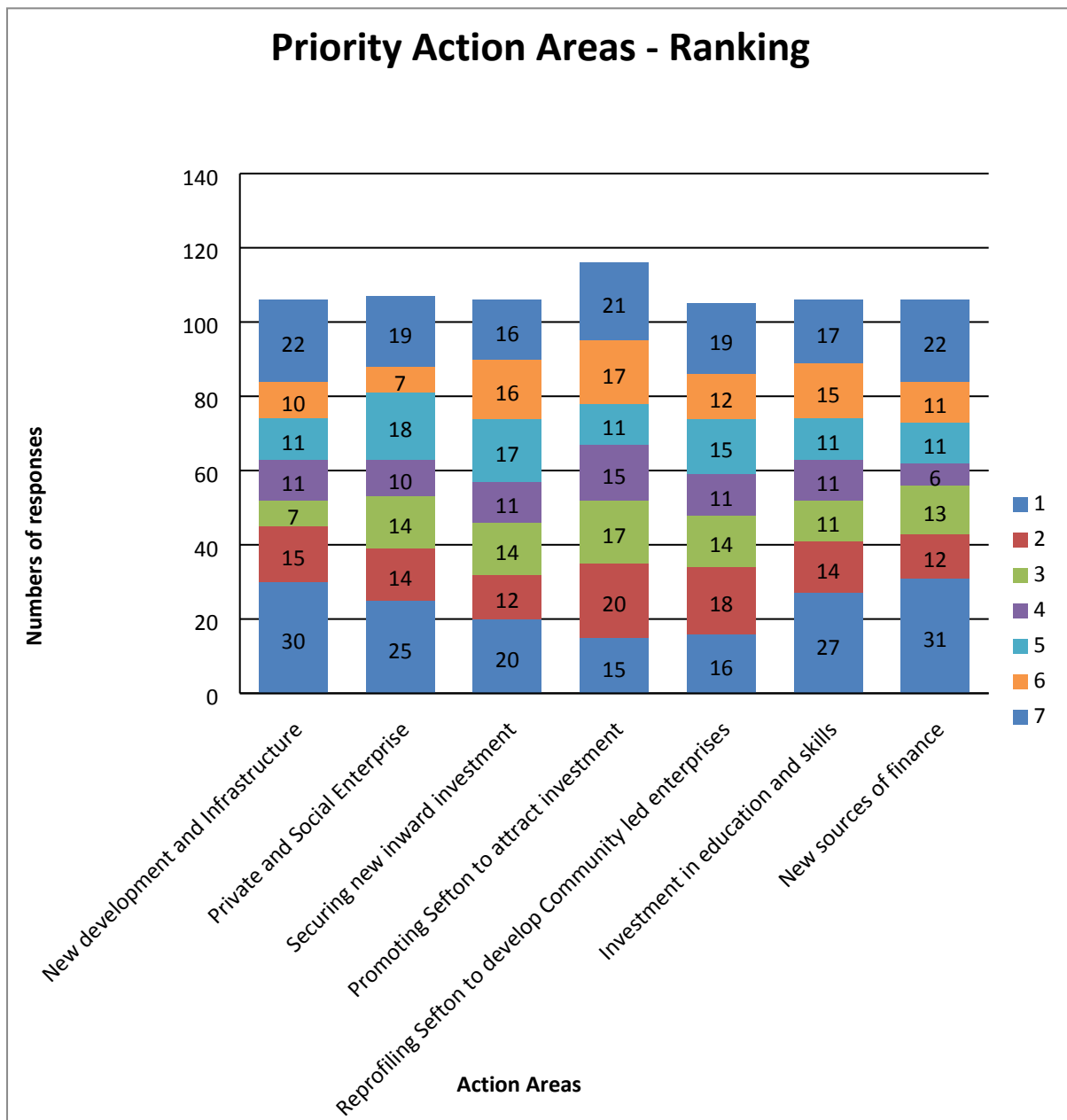
5. Thirty three comments were received in connection to the Key Opportunity Areas. Again there were a wide range of comments but the general consensus was that each of the key opportunity areas also present their own unique challenges for the borough although, **jobs, skills and assets** featured most prominently.

Responses can be summarised as follows:

- Make better use of Council's own assets, refurbish town halls, revitalise and reimagine libraries
- Reduce number of charity shops on high streets
- Install attractive signage around the borough
- No reference to Southport BID and its objectives
- Internet infrastructure is key to obtaining economic growth
- Spending on economic growth should not be prioritised at the expense of the most vulnerable
- Provide support to help improve the capability and performance of those SMEs with greatest potential for growth
- Need robust action plans for each priority
- Sort out ownership issues with Southport Rail Station

A full list of the comments can be found at Appendix 2

6. How important are the Action Areas? (1 being the most important – 7 being the least important)



Respondents had the opportunity to rank in order of priority seven Priority Action Areas and were asked to rank from **1 being the most important to 7 being the least important**. On review of the responses, those who completed this question either ranked the priority action areas as instructed or chose to complete using multiple responses; for example, ranking several priority action areas the same. It has been agreed to use all the information provided whether completed as instructed or where multiple responses were provided. Either method still provides more or less the same outcome in terms of overall ranking.

Each ranking of 1-7 is identified by a colour (legend on the right-hand side). The columns show for each Priority Action Area the number of people who ranked the Action Area. For example, 31 people ranked New Sources of Finance as a 1 – being the most important to

Agenda Item 10

them.

From the responses in the graph above, the priority action areas that are the most important to the respondents (rating number 1) are ***new sources of finance*** and ***new development and employment***.

7. Twenty eight comments were received in connection to the Priority Action Areas All mixed and, in line with previous questions, some recurring themes:

- “Fast Broadband is key, we want to see small independents offering Sefton residents and businesses a world class connection”
- “Need to attract external, private creative investment to bring people back into Southport, make the most of our amazing USPs”
- ...”strategy refers to the Port and surrounding area.....what are the plans for Maghull and Formby?”
- “Slaidburn Crescent has B2 industries nearby....environmental issues for residents.....this area would be ideal for new incubator/start up space instead”
- “Emphasis on community led enterprises is commendablebut how committed will they be to productivity and output”
- “The action areas are all important....Bootle’s destination as Liverpool’s Northern Gateway could be better explored.....limited mention of the increasingly commuter based economy...”
- “...Don’t spend too much time reconfiguring the council, energy should be concentrated to serve those that require support and not drained through constant reorganisation”
- “Council has a vital role to play working collaboratively with Liverpool Region organisations.....make use of its own assets, land assembly, use of CPOs where necessary acting as a broker through use of prudential borrowing, maximising funding from external sources, prepare development/planning briefs.....”

A full list of the comments on the Priority Action Areas can be found at Appendix 3

8. I would like to be kept informed and being part of the development of the Sefton Economic Strategy.

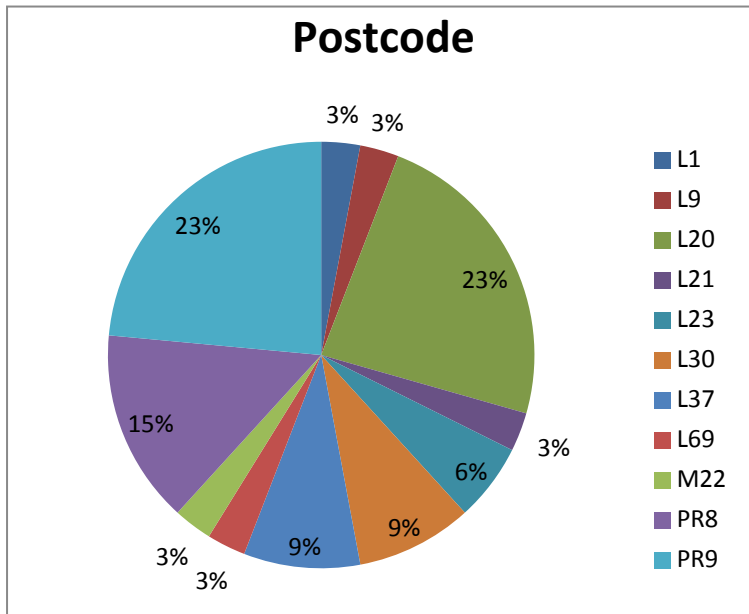
Fifty seven respondents indicated that they would like to be kept informed of the development of the Sefton Economic Strategy. Twenty seven of these were local businesses. Thirty seven respondents also indicated that they would be interested in being part of the development of the Sefton Economic Strategy, with 24 from either a business or organisation.

These respondents will be engaged and kept informed by InvestSefton. Where applicable this will also include follow up support including any employment related assistance from Sefton@Work.

9. Equality Monitoring

Members of the public were asked if they wanted to complete the equality monitoring questions and were told that this was optional and they could answer as much or as little as they wished.

Postcode

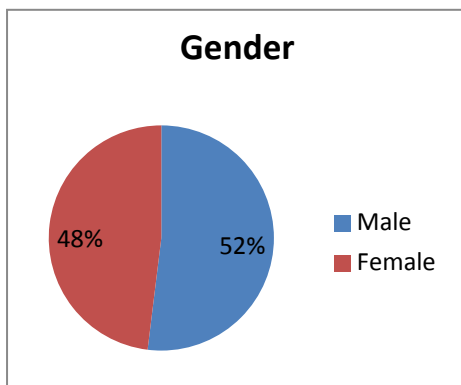


The above pie-chart shows the geographical areas by postcode of the people who responded to the survey. There was a reasonable spread of responses from across the borough, approximately:

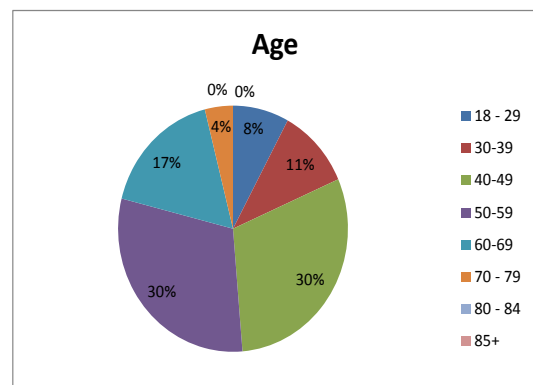
North Sefton-	47%
Mid Sefton-	21%
South Sefton-	29%
Outside Sefton-	3%*

*Includes stakeholders/ Liverpool City Region partners

Gender



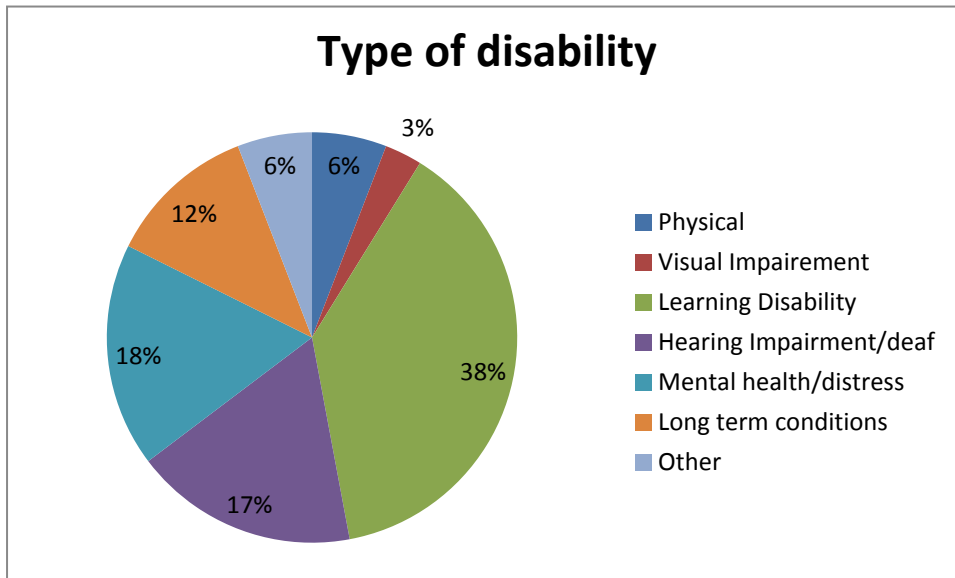
Age



There were no comments directly related to gender and although no direct comments were related to age from an equality perspective, there were two comments that referred to Sefton's rapidly ageing population and post-14 education.

Agenda Item 10

Disability: Do you have any of the following (please tick all that apply):



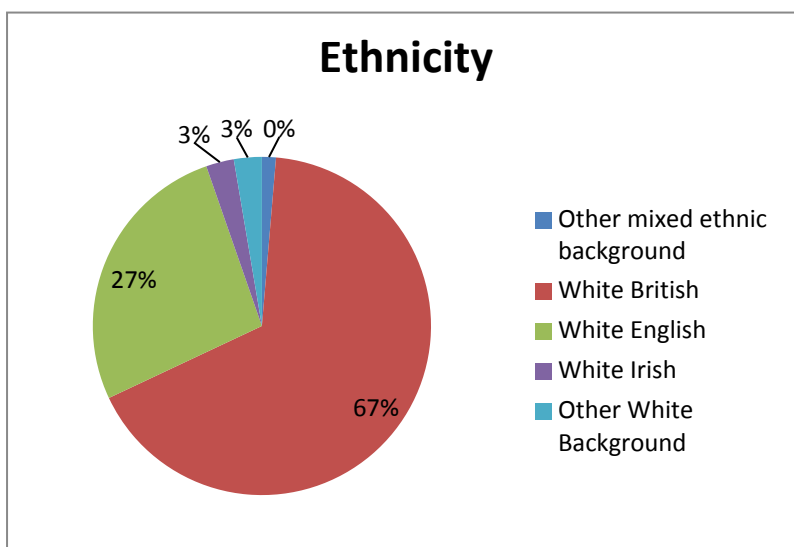
The other types of disability mentioned were: Autism and Dyslexia.

Fifteen of the respondents answered 'Yes' to the question about whether they considered themselves disabled, under the legislation.

An analysis of the raw data for disability and the comments received for the questionnaires shows that no comments received were related to disability.

There was however a focus group undertaken with members of the People First Merseyside organisation, where feedback was given in relation to people with learning disabilities finding and securing employment and mental health. Mental health impacts on employment were also discussed in the other three focus groups. Further details of this can be found in the Focus Group section of this report.

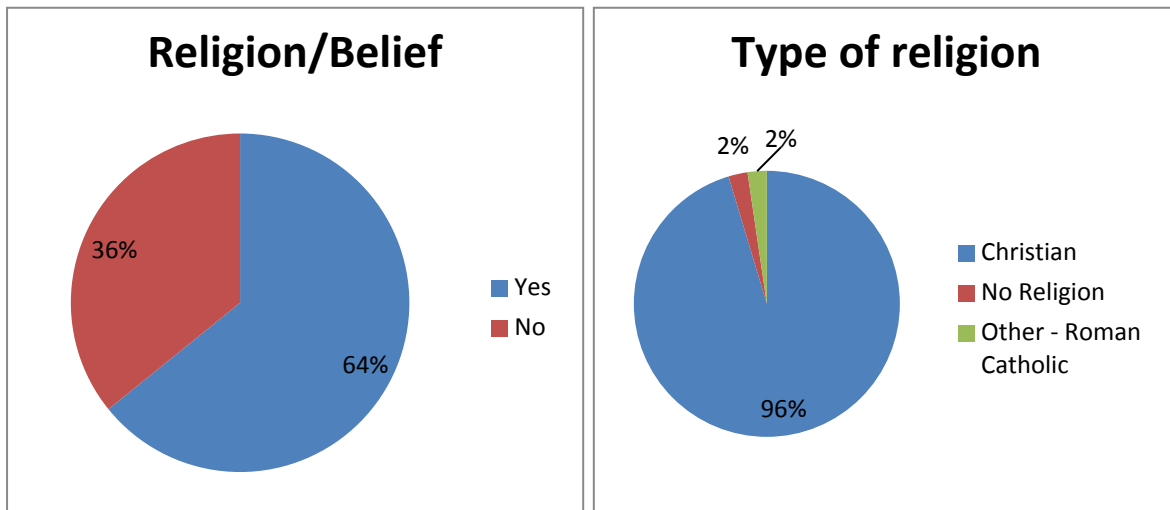
Ethnicity



Seventy five people responded to the question about ethnicity and the results from the ethnicity of the respondents can be seen in the graph above.

No comments received in the main body of the questionnaire were related to ethnicity.

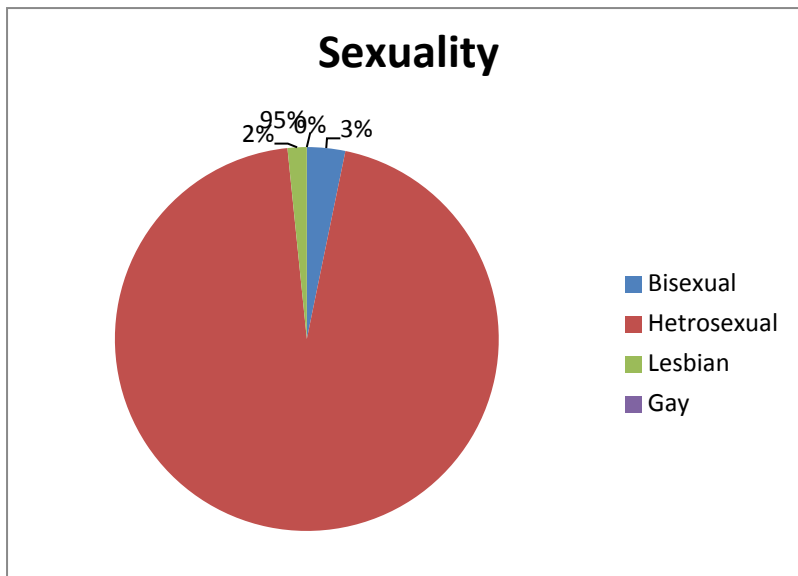
Religion



Sixty seven people responded to this question. Just over two thirds declared that they have a religion/belief and the responses are detailed in the graph above. The main religion for those responding was Christian.

There were no comments received in the main body of the questionnaire related to religion.

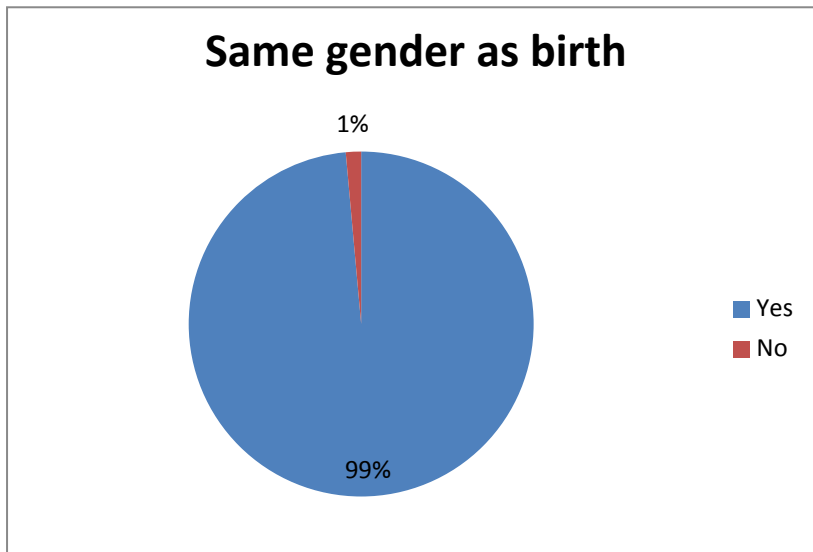
Sexuality



There were no comments received in the main body of the questionnaire related to sexuality.

Agenda Item 10

Gender reassignment



Ninety nine percent of people who responded to this survey are living in the gender that they had at birth.

There were no comments received in the main body of the questionnaire that were related to gender reassignment.

Focus groups

Four focus groups were set up with support from Sefton@Work colleagues, Sefton CVS and People First Merseyside. The aim of the focus group sessions was to:

- Find out from you what the important things to focus on are
- Understand why you think these are important areas
- Understand your preferred way of receiving information and what we can do to make this easier

At each session, the questionnaires (in the Easy Read) versions were used as a guide and completed during the session. An interactive 'game' was devised to help people identify the Key Opportunity areas and these were explored in more detail using a set of questions and probes. An additional question was asked at the end on communication and awareness to understand more on how people currently hear about jobs and what their preferred method was.

The feedback was captured as below:

Wednesday 18th April 2018

People First Merseyside (11 participants)

Key Opportunity	5 (very	3 (in the	1 (not very
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Agenda Item 10

	important)	middle)	important)
Housing	10 votes	1	0
Tell people the good things about Sefton	11 votes	0	0
Better Paid Jobs	9 votes	2	0
Education and Skills	8 votes	3	0
Roads and Transport	10 votes	1	0
Faster internet	9 votes 4 -1 votes	0	1
Health & Wellbeing	11 votes		

Gaps:

More funding for advocacy in Sefton

Customer Service needs to be better, especially with people who have a Learning Disability

Members scored “Health and Wellbeing” as their priority for the borough.

But members did focus on jobs too and said if you aren’t in work you feel:

- Sad if you are home all day.
- Feel lazy and sick.
- Stops us having heart attacks and Long Term Conditions
- It’s harder to get a job if you are special needs/disability. People with Learning disabilities do not get the job before other people who do not have a LD
- People with special needs feel they need to tell lies on application forms so they can get an interview.
- Employers won’t even interview you if you declare a problem. They should ignore that people have a disability. People should not be discriminated.
- Even with qualifications it’s still difficult to get real work experience. People need a chance to get experience so they can get a job.
- They would like more chances for people with additional needs.
- Companies need to understand more about employing people with special needs. Managers need to accept what a disability is and know a bit more about how it is in an interview for someone who has a disability.
- Can employers get some training to employ people with disabilities?
- Working can change your lives
- “I am a qualified sewing machinist and have certificates but not able to get a job. I have evidence of work and skills and a reference from a college, but do not help. Give people a chance”

Wednesday 2nd May 2018

Strandbyrne Health and Wellbeing Shop (4 participants)

Key Opportunity	5 (very important)	4	3	2	1 (not very important)
Housing	2	1	1		
Tell people the good things about Sefton	1		3		
Better Paid	3			1	

Agenda Item 10

Jobs					
Education and Skills		3	1		
Roads and Transport		4			
Faster internet	1	3			
Health & Wellbeing	3			1	

Gaps:

- To get people in full-time employment and off benefits
- The elderly generation and people with disabilities
- More social clubs for young people in Sefton – day and evening

Jobs

- There are not enough jobs out there at the moment.
- Low paid jobs impact on benefits and being able to pay for nurse fees
- There needs to be more awareness of Sefton@Work and the support they offer
- When looking for jobs – people with disabilities/partially sighted are disadvantaged
- People who want to get a job do not get a response back from employers
- People want 'proper jobs' – feel cheated about the system
- Being a volunteer is sometimes better than a job

Barriers

- Having a disability/epilepsy is a barrier
- Some people don't like to travel
- The pay can be a barrier – needs to be able to support self and family
- Full-time employment will help to become independent

Health and Wellbeing

- Support for people with mental health – more advice needed. People are listening but not necessarily doing.
- People who are not working get isolated and can get depressed – don't go out – get in a rut
- Part-time work for some people is better – working a few hours a day – full-time work can be tiring.

New housing

- Some people want to move out and be independent – more supportive living in Formby.
- It's the type of housing that is available.
- The local environment is getting more run-down – windows getting smashed. 'makes me feel scared and not safe' (ASB)
- There is not much choice with Housing Providers

Communication and Awareness

Agenda Item 10

- Currently hear about jobs by:
- Phone, Internet, Universal Job Match, Indeed
- There are language barriers – some jobs that are advertised are worded in a way that we don't understand what they mean.

Thursday 4th May 2018

Sefton@Work Clients – Bootle (5 participants)

Key Opportunity	5 (very important)	4	3	2	1 (not very important)
Housing	3	2			
Tell people the good things about Sefton		3	2		
Better Paid Jobs	3	2			
Education and Skills	3	2			
Roads and Transport		5			
Faster internet		3	2		
Health & Wellbeing	2	3			

New housing

- Being able to move, i.e. from a two bedroomed property to a one bedroomed property
- Think about converting properties, rather than building new properties
- Should be able to stay in the area you are living in – but a chance to move also, if needed
- If the area is improved and the quality of living accommodation is good, then this helps people feel better
- Housing needs to be affordable. Bootle and Sefton are low income areas so need affordable housing

Jobs

- Would prefer jobs to pay more money than the national minimum wage
- Ideally you need a job that suits current needs and then have the opportunity to progress
- Developing skills and experience are building blocks to getting a (better) job
- Money is important as you need to pay bills. Having a decent wage helps to improve self-worth – feeling valued
- Low pay affects benefits
- A variety of businesses need to be in the area – more diverse shops in The Strand

Agenda Item 10

Education and skills

- Need to invest more in people
- There should be more places like Sefton@Work
- It's about having the right skills
- On the job training is important – but it will depend on the job. Example – “in a previous employment, 70% was on the job training – I learnt about people’s medical conditions and how to handle things/different situations”

Roads and Transport

- Public transport is needed to be able to get to jobs, including jobs that are after-hours (shifts)
- Some jobs are not economically viable because of travel and shift patterns
- Some people can't afford to run cars

Internet

- The internet as a whole has some positives and negatives

Health and Wellbeing

- Not being in work can have an effect on physical, mental and emotional health. It can lead to depression and affects self-worth and confidence – feel useless and not be able to contribute. Its difficult having to cope with something (being out of work) when it is something you haven't done before.
- There is a little bit of pressure to work because of the benefit gap and family demands
- “I enjoyed work, but circumstances at work affected me physically – demands from employers and extra responsibility – which meant I had to leave work and start from scratch”

Communication and awareness about jobs/courses

Hear about jobs/courses from:

- Newspapers
- The internet
- The Job Centre
- Sefton@Work
- Social Media
- Emails
- Job search sites

Friday 5th May 2018

Sefton@Work Clients (Southport) – 4 participants

Key Opportunity	5 (very important)	4	3	2	1 (not very important)
Housing				4	

Tell people the good things about Sefton	3				1
Better Paid Jobs	3	1			
Education and Skills	4				
Roads and Transport	1	1	2		
Faster internet	3	1			
Health & Wellbeing	4				

Housing

- The current housing stock should be refurbished. Old buildings should be adopted. New build homes are like dolls houses. New build estates are spread about which results in a lack of community.

Telling people about the good things about the borough

- More advertising needed for events. Southport needs a university to attract young people
- Lord street is full of empty shops – people need to go home with a positive experience.

Better paid jobs

- The barriers are – more training and education provided by the employer and more training provided that is higher than level 1.
- Southport has a high care sector with low pay. Also it is mainly tourism jobs that are available.
- It needs to be a mixture between training on the job and training before getting a job. And different types of training should be available.
- Pay, progression and working conditions are all important.
- Would like the opportunity to do courses whilst working to help self-development and there isn't much opportunity to do that. "I have a 16 hour contract – with no set days/times. I find out 3 days before when I will be working the next week, so I find it difficult to take up training or commit to anything".

Skills and education

- More work skills/training in Southport.
- Getting the education right at an early age helps as people can progress as they get older.
- There should be access to education for all ages.
- The Liferooms in Southport is a nice environment and they do an employability course there.

Agenda Item 10

Roads and transport

- The train links are good generally. There is a lack of public transport in rural areas. There should be more use of minibuses or small 'comfy' buses.
- Transport links to Liverpool are good.
- The cost of travelling can be a barrier for some people.
- "I work nearby, so I walk"
- Some people don't drive, so it limits the possibilities

Internet

- Everything has to be done on the internet now when applying for jobs/benefits.

Health and Wellbeing

- It's good to have the 'feel good factor' – if people feel good about themselves, it helps.
- Not being in work affects what you can afford. Mental health issues are rising – need to have people who can support you.

Communication and awareness

- Currently use the following to find out about work and courses:
 - Internet
 - Sefton@Work Advisors
 - Work coach at Job Centre+
 - Jobs in shop windows
 - Liferooms - outreach

Business Focus Group

Twenty businesses attended a Business Focus Group in Bootle Town Hall on 19th April at a special event organised by InvestSefton. The Council's Executive Director led the discussions outlining the rationale for the economic strategy which sets out Sefton's key priorities, challenges and opportunities and plans for future growth. Businesses were also advised how the strategy links to the Liverpool City Region Single Growth Strategy and the council's own Public Sector Reform and Economic Growth and Prosperity objectives.

A number of thematic areas for consultation have emerged including **business growth, enterprise, investment, innovation, job creation, physical regeneration, the coast, town centres, infrastructure, skills, employability and the social economy.**

Feedback

The group were asked if they broadly supported the broad aims of the strategy; **the general consensus was that the strategy captured all the key opportunities** but in terms of moving forwardt **"there needs to be a robust implementation Plan"**.

Businesses were advised that the council was at a crucial stage of developing its Action Plan

for Growth but was not yet in a position to share. This would form part of the next steps in terms of finalising the strategy.

The Council's role in the strategy is to act as a key enabler and commissioner; other organisations and institutions also need to share responsibility in the key thematic areas.

Businesses were also advised that there are three Investment Strategies that focus attention on three distinct areas of the borough.

Other key questions/comments/observations are summarised below:

"More joined up thinking required, strategy lacks depth and requires plan of action"

"There is a disconnect in Southport with the council.....the retail offer is dismal.....A key retailer David Robinson Jewelers' is now leaving"

"Strategy is quite generic in content but Sefton's uniqueness is its diversity focusing on Southport/Crosby/Formby and south Sefton (Mini-economies); more attention is required in terms of distinguishing these areas, also our proximity to Preston/Lancashire"

"Southport is a great dormitory town to places like Preston, we should use this to generate residency in the area".

"We have contradicting objectives in that we want to increase visitors to the area but the visitor economy itself is a low wage sector, something we want to change"

" Our Chamber of Commerce is a waste of time and poor.....Chambers should be fundamental to growth.....Why doesn't the council take over Sefton Chamber like Wirral Council has done"

"We need a 'beacon' of a place where businesses can go for support"

"Housing development seems to be getting pushed on us and there is an imbalance with available land for business"

"Health and well -being needs more focus and clarity.....needs joining up.....need to engage NHS, colleges, FE etc"

"The Business element should be the heartbeat of the Strategy and education is needed to help support that and the pressure of housing is being pushed into the Strategy.....There needs to be a balance between land for business and land for housing".

"Need to address support for young people,59% classed as NEETs including a range with social issues, need to break the cycle of school leavers not moving into employment"

" in the USA NEETs are referred to as Youth Opportunities and businesses proactively seek to support and mentor.....there is a different mentality and approach"

"Business and education, skills and training need to work and talk better together"

"Sefton Education Business Partnership which was originally set up by the council offers support in this area"

"Graduate retention is key.....Sefton and LCR losing large numbers of graduates moving away from the area"

"Skills and training are important for being job-ready"

Sefton@work have recently supported 100 people into ILM employment, mostly those

Agenda Item 10

furthest away from the labour market.....Careers Connect also focussed in this area offering an array of solutions....joined up work is evident in this area

“People not prepared to travel to work even from Maghull to Southport.....this is an endemic issue that needs to be addressed”

“Funding elements are critical”

“Sefton should have its own media creative centre”

Letters of representation

There were three letters of representation received and one respondent who completed a questionnaire included additional comments. These are available as background documents. The main points from these representations are:

Crosby resident/stakeholder

“ the framework is welcome in broad terms but overall reads as if it has rather been pulled off the shelf.....the concept of ‘Inclusive Growth’ and the accompanying ‘framework for action’ could have been written about anywhere, so what is special/specific to Sefton and what is its unique selling point (USP)?”

“...there is need for an update summarising how the various national, regional policies and strategies impact Sefton”

P4.6 “ No reference to the SHELMA study, What has been the impact of the SHELMA study on Sefton?.....does Sefton have an adopted Asset Management plan?”

P 4.13 “the role/potential of Southport Town Centre as an economic driver needs further consideration, there is an urgent need to rethink Southport’s retail offer”

P4.17”considers Strategic Transport Investments but does not appear to recognise nor consider the implications for Sefton’s economy of TfN’s ‘Major Road Network for the North’; ‘Port Connectivity Strategy’, ‘The Freight strategy for the North (led by Merseyravel)’ “Port of Liverpool Rail Strategy”

Delivery tactics: ...strategy needs to be translated into and followed through with a consistent and systematically monitored Programme of Action”

P4.20 “ Digital-There are emerging aspirations and policy initiatives from the Metro-Mayor of the Liverpool City Region”

“Consideration should be given to:

- Metro-Mayor ambitions/initiatives for post 16 (tertiary) education*
- The impact of Sefton’s ageing population on labour supply and on the quality of workforce as it increasingly ages*

“ Generating new sources of finance to support growth- p5.14 & 5.17: There should be explicit recognition of the role of the council as an ‘Enabler’. How the Council makes use of its own assets-land and property; land assembly assistance; use of Prudential borrowing etc.....this will play a key part in delivering elements of the Sefton Economic Strategy”

“ Repositioning and Re-profiling Sefton-Environmental Coastal assets should be seen as a

key driver of this process”

“Other-There is a need for a bibliography and glossary of terms”

Waterloo resident/stakeholder

“.....No consultation has yet been held with local residents on funding for the CLAC.....the CLAC is a fine facility.....there would be synergy between ‘Another Place’ and the CLAC were the latter to be adapted to act as a visitor centre for the former, with the exploration of art work and appropriate souvenirs of the district, its historic links and heritage”

....”The Coastal Park is a valuable Green Asset and will be all the more important should the Council fail to overturn the short-sighted vandalism proposed for Rim Rose Valley”

....” Elderly and social care-Council should emphasise opportunities for third sector providers.....is there any way the Council can be more generous with funding for care facilities so that the private sector would respond with new businesses”

....” Sefton or the Combined Authority could adopt a policy similar to GLC in the 1970’s by providing mortgage finance to young people to help revitalise older housing stock?.....

“Sefton has a fine record of attracting investment, the draft report has failed to acknowledge fully the progress made in recent years”.....

Southport Business

A Southport based business produced a detailed response to section 2: Creating and growing Local, Private & Social Enterprise. The response is comprehensive and has attempted to link proposed key actions to the strategy:

Strategic Objectives - *Our overall strategic objective will be to increase our wealth creation capability and improve economic performance by:*

- 1. Delivering inclusive growth and providing world class business support solution*
- 2. Maximizing the number of successful high growth potential new business startups*
- 3. Maximizing the number of businesses achieving sustained growth*
- 4. Maximizing our HE institutions contribution to improving the performance of our economy*
- 5. Become a beacon of best practice for economic regeneration*

Objective

Sefton needs to grow the business base through creating and growing new private and social enterprise. It must embrace growth and ambition across the business base, and provide more focused intervention to realise potential where it is considered greatest, which may include key opportunity sectors and target geographies

Priority Actions

Agenda Item 10

- *Introduce improved new business startup workshop and business mentoring program targeting key opportunity sectors and scalable companies which have the greatest potential for growth*
- *Ensure the physical infrastructure to support start-up activity is in place, including serviced workspace, incubation space and associated support and facilitation*
- *Provide world class business support solutions that will enable our high growth potential businesses to build capability, embrace best practice, improve productivity and ensure they are delivered by people who are the best in the business*
- *Work with our HE institutions and businesses to help eliminate skill shortages*
- *Ensure all our businesses take full advantage of Industrial Digital Technologies associated with 'Industry 4.0'*
- *Strengthen relationship between our HE institutions and high growth businesses to enhance knowledge transfer, technological development and commercialization*
- *Establish effective processes for sharing solutions and best practice between collaborating businesses*
- *Fully exploit the opportunities present by reshoring*
- *Fully exploit the opportunities present by existing manufacturing businesses looking to set up operations within the borough / region*
- *Simplify and rationalise administration of business support services to improve communications, add more value and build a stronger relationship with the leaders of our high growth potential businesses*
- *Ensure Sefton's social enterprise businesses build their capability and exploit opportunities for growth, including those presented by public sector reform.*
- *Increase the number of exporting businesses and value of exports in Sefton*

Appendix 1

Comments on the three Broad Aims of People, Place and Productivity

This will be especially important as the HMRC are leaving Sefton for Liverpool. This is going to have a massive impact.
Saying this is OK - it's doing it
Yes, I strongly agree that there needs to be more housing and more jobs in Sefton to help people get better jobs and better housing
Yes, I would like to get in a full time job when I move over to Universal Credit. Then I would like to on the rent to buy scheme by getting a house
As a Sefton person, I don't really agree that there are better paid jobs and businesses
Investment in place making is top of my list. Add to their attractiveness and much follows. Your idiosyncratic use of the word 'productivity' is unusual. You want better, more remunerative work, but although easy to call for, it is not easy to create. Putting residents at the heart of the economy is laudable, but it should be appreciated it is worth doing for its own sake. The education and training benefits locally and externally for the rest of the country,

not just for our borough.
Bring more work placements and training to Southport
These all need to be looked at as a whole if Sefton is to succeed in delivering the ambition of the Economic Strategy.
Nothing on Internet Connectivity in Crosby, Bootle etc. We are moving 24 jobs out of Sefton into Liverpool next months because we simply cannot operate on the slow speeds we have now, as a digital business, this no doubt will be consequences for the indirect jobs.
The language used in this diagram is not very accessible to enable a fuller comment
Really exciting strategy - it will be essential to deliver bold actions to really bring it to life. Very positive to see creative and digital brought out as a priority sector - embracing this could be transformational for the area.
I agree with the broader concept that there has to be economic growth to sustain healthy, viable communities but find a lot of the literature to explain and promote these concepts repetitious and with a lack of sincerity. Reading the framework I find the term ' well-being ' overused and of little relevance in connection to residents in my locality where we have seen planning permission in the past being granted to anyone and everyone in order to fill every space available in a very small and condensed area. This 'economic development' is Slaidburn Industrial estate which nestles into a highly populated residential area and causes nothing but problems. Planning has given no consideration in the past to resident's well-being. Commercial enterprises would be more acceptable but engineering companies etc. with all the attendant noise and other pollution should be in other peripheral areas, NOT amongst housing.
Support for business is crucial if Council is serious about its growth ambitions
Wellbeing, call it happiness if you like, should be the key aim. All I can see is blueprint for more of the same strategies that never get us anywhere
To many assumptions have been made not enough detail and changes in council policy to bring in new businesses, commercial growth for existing private enterprises and new horizons for all residents.
We are particularly interested in ensuring there is sufficient efforts in growing the local visitor economy. Unfortunately due to the high level of visitor accommodation being developed for low cost Houses of Multiple Occupations this has diluted availability for beds servicing the conference and tourism market. Sefton Council needs to seriously consider the effect this will have in developing Southport as a visitor attraction, there appears to be a lack of understanding the visitor economy is not entirely focused on Lord Street. The number of empty shops in Lord Street reflect the lack of local economic growth. Indeed, when compared to other resorts in North wales for example, local councils appear to take an active part in growing the visitor economy. Llandudno has a vibrant economic "buzz" with very few empty shops in the main pedestrian areas.
While the aim may be valid the potential for achievement is so unlikely as to make it ridiculous.
The aims are on the whole agreeable however they are broad, wide ranging and as such can they actually be achieved?
Growth must mean more traffic on our roads and this means roads on valuable green space
Focus on investment the rest will follow
Our borough strongly needs investment. Some parts of Sefton have been forgotten which is sad. Hopefully with the 2030 plan more investment and strong will of people the borough can hold its own again in the future
The framework is not ambitious or radical, perhaps best described as 'safe' or 'risk adverse'.
But it needs more detail on how internet will be "fixed" and a firm plan around that with demonstrable action points we feel.
Knowledge is key, the people of Section understand their environment, and have a good holistic eye for our future pulse.
I broadly agree with the basic aims of the Framework for Action, but I feel it was compiled with unnecessary attention to language which distracts from the content.

Agenda Item 10

A strong strategy which covers all the key areas. For it to be truly bold and brave, innovative approaches and tangible actions will need to be taken. Pleasing to see that creative and digital is identified as a focus sector - as embracing this could be transformational for the area.

I think the strategy is very worthwhile but too generic in many respects. I believe that a more direct style of urban planning is required to make sure that communities are well designed and we don't wind up with fringe housing estates with few facilities, inadequate employment areas, desolate town centres and overstretched health and education services. The three parts of the borough are distinct and each probably needs a markedly different approach. And we should not be afraid to look at best practice elsewhere. Can Teesside offer lessons to Bootle; could Haslemere be a model for Formby; is Harrogate an example for Southport to study?

Understanding that all aspects are linked. Most important aspect for me is developing estate and infrastructure designed specifically for digital business yet making it affordable for SME and start ups

It needs doing as soon as possible.

This strategy needs to be integral with the Liverpool City Region strategies given that Sefton is part of the wider functional economic geography - An integral strategy should drill down to the local authority and focus further on the realising of the Liverpool City Region priorities and the unique offers and challenges of the local authority. Sefton as one of the key partners in the Liverpool City Region Combined Authority is not really set in context and very little mention of the benefits this can bring and subsequent recognition of the activities being undertaken at this level of which Sefton is an integral part. 2.18 / 2.19, no mention of membership of Combined Authority, Liverpool City Region Skills Strategy, Skills for Growth Action Plans, Apprenticeship Growth Plan, Local Area Review (and the impacts this is likely to have on delivery) and the devolved Adult Education Budget. 2.21, no mention of the Skills for Growth Action Plans of which Digital Skills is a specific one. 4.13, no mention of Southport BID in this section or the Visitor Economy LEP lead. 4.30, this should build on the Local Area Review and harness the changes this will bring to delivery going forward - should mention the Liverpool City Region Skills Strategy and the Sector Skills Data which gives valuable information relating to replacement demand and potential future job opportunities which should feed into FE provision going forward. 4.36/4.48, no mention of building on the Raising Participation Age agenda, AEB devolvement. Also no mention of Apprenticeship Levy for larger companies and the opportunities this can bring. In "Priority Actions", "Delivery Tactics", there is a strong Sefton focus on provision. Apprenticeships (4.49) and Guidance (4.50) are well recognised in the report, but the role of Liverpool City Region delivery set out in the Skills Strategy Plan (which is not mentioned) needs to be included with AEB, the Apprenticeship Hub and the planned Careers Hub. A casual reader would assume that Ways to Work and Youth Employment Initiative are Sefton initiatives. Good to see focus on Households Into Work as a Liverpool City Region initiative, but no recognition of opportunity for further devo asks to respond to shared challenges. The focus on graduates is important but misplaced as it focuses on graduate retention (4.46) without reference to creating the necessary graduate level jobs. Some images or case studies of various aspects of Sefton's economy would help the readability of this document. Charts breaking down the sectors of the economy and types of businesses would also improve understanding. Good to see a focus on Inclusive Growth, but there is no mention of the gaps faced by those marginalised demographics of gender, race, and disability; with no approach to narrow these gaps. This inclusive growth needs to recognise the importance of well-being, be accessible and not increase car dependency.

Skills-Education and young people being prepared for work

I agree with the broader concept that there has to be economic growth to sustain healthy, viable communities but find a lot of the literature to explain and promote these concepts repetitious and with a lack of sincerity. The literature, as often does, appears to be a 'one size fits all' commissioned piece. Reading the framework I find the term 'health and well-

being ' overused and of little relevance in connection to residents in my locality where we have seen planning permission in the past being granted to anyone and everyone in order to fill every space available in a small and condensed area. This 'economic development' is Slaidburn Industrial estate which nestles into a highly populated residential area and causes nothing but problems. Planning has given no consideration in the past to residents well-being .Commercial enterprises would be more acceptable ,but engineering companies etc. with all the attendant noise and other pollution should be in other peripheral areas ,NOT amongst housing. I am concerned about some of the points made within the Economic Strategy Framework for Sefton literature:- I e.4.30 DELIVERY TACTICS 'Ensuring that the planning system operates as efficiently and positively as possible to minimise delays and reduce barriers to development' My concern here is that it suggests that planning consideration will not be given due diligence and any recommendations to mitigate potential problems could be overlooked by the need to ' push things through' PRIORITY ACTION AREAS Identity - the priority here appears, first and foremost ,to serve industry and this has been apparent in previous planning applications and approvals where the overriding factors have been to sanction business development at any cost to surrounding neighbours. What confidence does this give communities that their needs will not only be listened to but taken into account more proportionately in the future? Our neighbourhood has, at last, seen one planning application refused, but it has taken 4 years from everyone's lives to achieve this and could have been avoided by Sefton planning observing their own identified concerns prior to granting approval. Ensuring (4.30) that the planning system operates as efficiently and POSITIVELY (positively on whose behalf ?) to ' minimise delays and reduce barriers' to development does not bode well in relation to Sefton's concerns to its residents health and well-being.

I agree with the concept of the framework and the need to look toward future economic growth. However, having read the Framework I am concerned with some of the proposals which I perceive to be weighted in favour of industrial growth i.e. engineering etc. and the recommendation that (Delivery tactics 4.30) " the planning system operates as efficiently & positively as possible to minimise delays and reduce barriers to development " - I feel this rush to push through planning approvals may compromise and measures to mitigate problem applications. .Sefton is a large and quite diverse area . I live in Southport and have experienced the encroachment of B2 class industries being squeezed into (at any cost) highly residential areas. The Economic Framework asks about identity. Southport identifies strongly as a leisure destination - an area where people from industrial Ares escape TO. Sefton as a council need to be more mindful about how and where it develops new enterprise. The Economic Framework uses 'buzz' words such as 'Person centred' 'Health and well-being' etc. Sefton council needs to recognise the connection between health and well-being, economic growth and its planning decisions. It needs to enshrine in any recommendations, a way to resolve existing problems along with developing new models for the future.

The aims listed are great, let's see them come to fruition.

One aspect that seems to be missing is what we can do to help ourselves by spending our (the Council's) money within Sefton. Accepting that we have to take into account the overall cost there is a value to retaining spending within the borough in terms of it then being spent locally - should we take this into account in our spending?

I think there needs to be greater emphasis on the links between economic growth, health and wellbeing and sustainability - in terms of growing the economy whilst cutting (limiting) greenhouse gas emissions. For the national view this is set out in BEIS Clean Growth strategy <https://www.gov.uk/government/publications/clean-growth-strategy/clean-growth-strategy-executive-summary#next-steps> I see in the 'wider social value measures' it does reference measuring 'Progress in reducing or limiting growth of carbon emissions by type of activity', yet I think in such a high profile and ambitious document it should provide context to wider benefits of minimising the negative environmental impacts growth can bring and enhancing the positive opportunities for residents and business.

Agenda Item 10

Needs to be more emphasis on proving business support services that help improve capability and performance of our SMEs that have most potential for achieving significant growth

Overall, the Strategy comes across as being rather general and could have been written for almost anywhere. It needs to be much more 'Place' specific and tackle in a much more detailed way the implications of certain major developments, e.g. the Liverpool 2 Superport ; the impending relocation of HMRC away from Bootle Town Centre; changes in retailing and the impact on town centres. It is poor on context, e.g. the Government's Industrial Strategy; the 'Northern Powerhouse' Independent Economic Review for Transport for the North; the LCR LEP's Economic Strategy, the SHELMA, and the implications of all of these for economic development in Sefton.

Appendix 2

Comments in connection to the Key Opportunity areas

But do they listen and do they provide it or is it a one way system.

You run new housing and employment development into one category which will steer the responses to this questionnaire. I would rate employment as a '5' and housing as a '3'. Improving the existing housing stock would rate a '5'. Much of Sefton is high quality environment, except for areas of Seaforth and parts of Bootle. Council investment should enhance distinctiveness of place. A small outlay on attractive signage for instance, disproportionately enhances the environment. Public money for Buxton's restoration of its Conservation Areas was matched 2 to 1 by private investment.

If there was more integrated delivery across the LCR then not everything would need to be delivered in Sefton.

Each point in the categories above is of high relevance. However, as I have already commented the last point in relation to ' Health and well-being ' needs to be considered more by the council during its planning processes. Myself and neighbours have fought hard with companies and council bureaucracy to achieve levels of health and wellbeing which council literature past and present (as in the framework) promote but did not uphold. There has been a lack of development in all areas but can we PLEASE have growth which is meaningful, well thought out , creative and sustainable . There is also talk of cultural needs and growth. Where are the local libraries- SHUT. What happened to the beautiful museum in the Botanical Gardens ,Churchtown- SHUT The Town Hall ,where many wedding events occur- filthy and screaming out for a coat of paint and the glass display boxes pinned to the wall filthy and containing yellowing, Sun scorched paper. These aren't necessarily tasks that require framework, meetings and never ending levels of beaurocracy. Visitors/Tourism - I wrote a letter (of disgust) several years ago about Southport's filthy streets and its visually depressing vista when walking out of the train station. I received a very robust reply from the Mayoral office. However, the multi ownership of the station complex appeared to create difficulty in allowing any development of the concourse. Filthy footpath running between Morrison's petrol station and the swimming baths -strewn with plastic bags, wine bottles, beer cans and observed on a flower show day when walking through to the park. Apparently the council do not know who has responsibility for this. Overall, Southport is a beautiful place where I have lived for 40 years and there are some good initiatives. There needs to be a balance, but it is not seen as an industrial area. It is seen by many as a place to escape to FROM an industrial area. We should concentrate more on commerce, education and developing an overall place of well-being for both residents and visitors alike.

Find ways to bring people together

Better commuter links (fast train service) to Manchester and Liverpool will bring access to higher paid jobs to local residents and bring higher earners to Sefton. Better cycle routes within Sefton (it's ideal it's flat!) and good public transport will ease traffic congestion and improve health of local residents. More focus and support for start-ups. Better digital

infrastructure is important here.
5. I think Peel Ports & Mersey Rail/Travel should make bigger financial investments into Sefton. 6. How can you improve digital infrastructure, there are so many projects and support for technology in Sefton, but we know we must keep up with the advancement of technology. 7. How can Sefton tackle health and well-being, for the people who live in the South of the Borough, residents don't know what pollution is pumped into the air at night and never will,
All fine targets but we need to remove existing political dogma and current council strategies to have any chance of realising these well-meaning aims.
Employment - this will bring people into the area to work which will in turn benefit the local economy as new money is spent within the area.
Our roads are at capacity now
Have read the document I acknowledge the (possible unique) diversity of the borough both socially and economically means this is a difficult plan to pull together and means pressure on limited resources is exacerbated
Investment is the catalyst as is good transport and connectivity, there needs to be more emphasis on the immediate needs as some of the rest will follow naturally
All the points above are all relevant for Sefton We are lacking in a lot of the above points
There is already too much housing development within certain parts of the Sefton borough - as there is insufficient infrastructure in place to cater for the number of people who already live in the area.
Internet infrastructure is key to obtaining the region's economic growth we feel, one that is independent and not using BT, Virgin or any national providers.
The strategy is very expansive. Each area is important but the ability to deliver quality across all simultaneously will prove elusive. The first two areas would give strong foundation for generating the income to deliver the others.
Transport is a big one, the importance of access and exit smoothly transitioned. Adequate parking where it is needed.
There needs to be a greater emphasis on how vulnerable people are protected and provided with the support they need. Spending on economic growth should not be prioritised at the expense of the vulnerable
With reference to education and point 4.49, I would suggest that it should be incumbent on business to provide work experience placement to post 14 students. It should not be a case of schools compiling their own lists of employers. Students on vocational courses post 14 should have at least one day a week on placement to enable them to develop a realistic view of the range of opportunities available to them, to begin to learn the full demands of work and, for the employer, gives the opportunity to shape the future work force and indeed the possibility of a "prolonged interview process" where they have the chance to select and guide the best students. Controls will have to be in place to prevent abuse of the scheme, both employers using it as a source of cheap labour or students as a rest day. Parents must take some responsibility for this. In order to get our graduates to return to the region more companies should offer sponsorships. The current situation with regard to student fees and the cost of accommodation is ideally suited to this. Companies get payback through summer and work placements with 'their own students' when they get the opportunity to further shape them and a guaranteed period of retainment following graduation.
Everything is vitally important. My particular interest is transport and it is evident that Sefton Council is not being proactive enough in making the case for infrastructure and connections. The loss of the Southport-Manchester Piccadilly rail service is an example, and we should have been strongly promoting the A570 upgrade to dual carriageway.
The overall project should be achieved in phases. Get the infrastructure right, change/increase local business which will then create demand and support additional housing. To look at increasing housing first potentially creates more issues. More people to find jobs and of course educate but no way of achieving these goals. The percentage of Sefton residents not in higher paid jobs in the area will only decrease!

Agenda Item 10

Education as to keeping the area clean as safe should be a top priority to attract business, growth and prosperity.

The action areas are all important. In terms of the agreed Liverpool City Region growth sectors: • Advanced manufacturing is not mentioned, despite the opportunity in Liverpool 2 for an International Exemplar for Marine Ballast Water Treatment, CNC Robotics, and Mast Group. • Digital and creative is highlighted, with good exploration of how borough can contribute to digital economy (particularly 4.20, 4.21, 4.22, and 4.23). Minimal mention of creative. • Financial and Professional Services and briefly mentioned, but with no drill down into Sefton's unique offer in being national headquarters to Santander. • Health and Life Sciences is not mentioned, despite opportunities evident with Mast Group. Also not mentioned is the Grant Funding Agreement that Hugh Baird College are close to agreeing a for a pioneering £3m Health, Engagement and Training Hub to deliver a training academy and base for Levels 1 to 6 Health and Social Care training delivered in partnership with Mersey Care. • Low Carbon Energy is not mentioned, despite a Sefton Carbon Management Plan. Key failure to mention: o On shore investment in local FE colleges (Skills Capital) o Priority Area Zone identified in Sefton for onshore commercial wind potential o Current 10 MW of operational large scale wind turbines at Seaforth Docks o Potential Southport and Formby DGH scheme o Bootle Docks Biomass energy plant. • Maritime and logistics is highlighted, with good exploration of how borough can further contribute to Liverpool City Region growth. Mersey Reach's developer Chancerygate is misnamed as Chancery Gate. • Visitor economy is mentioned, but this does not widely explore and exploit all of Sefton's offer, key failure to mention: Sport: Aintree and conferencing, Golf and the Liverpool City Region golf coast, Southport FC's new stand and conferencing; Tourism - National Trust Formby; Hotels and Spas; Southport as "England's Classic Resort"; No mention of Marine Park, cited in the key Liverpool City Region Visitor Economy Strategy and Destination Management Plan: comprehensive development of the Marine Park site to provide a regional visitor attraction ; Sefton Coastal Path; Southport Pier; Southport Pleasureland; Dune Splash World, The Atkinson

Education/training linking in better with local business

A place to LIVE and VISIT Southport identity is not in my opinion, synonymous with industry. Its heritage and culture has been built on holiday makers and day trippers. A population that wants to escape FROM industry, not live amidst it or be visually surrounded by it .An erosion of culture and high quality retail / accommodation has taken place along with services. Some of this is obviously due to trends and 'perceived ' progress. Some is due to bad policy making by government and councils. - LOCAL LIBRARIES - closed - BOTANICAL GARDENS museum, Churchtown - closed - TRANSPORT (bus) - taken off /re-routed/unreliable - LOCAL HOSPITAL - facilities reduced - PODIATARY SERVICES - several months wait /currently waiting - SOCIAL SERVICES ASSESSMENT - several months wait/ currently waiting - GP APPOINTMENTS (seldom used) - redirected to Ormskirk 'walk in'(x3) I do not think the above illustrates the quality of service or infrastructure that the current population deserve in order to support their Health and Wellbeing. Sefton need to be addressing these existing problems before encouraging further housing development and population growth.

All of the above points (Q1) add to the quality of both individuals and community. However ,there is little evidence of how infrastructure will be developed to sustain a growing population with increased housing and employment .Although some of the present deficits are a combined result of both council decisions and governmental policies a radical overhaul and expansion of services would be necessary:- TRANSPORT (bus) - there has been a steady decline in reliability - some services have been cut/ re-routed HEALTH AND WELL-BEING - Regarding health and access to services. My 86 yr old aunt diagnosed with diabetes and registered with severe visual impairment has just received a Podiatry appointment after 5 months. She is still (after 5 months) awaiting a social assessment and cannot, as yet, access services to which she's entitled. I have rarely used my GP surgery/ resources but on the last 3 occasions have been told there are no

<p>appointments and to go to the 'walk in' centre in Ormskirk. Will new surgeries be built and staffed. Will there be more resources to meet these demands as they cannot with the present population PLANNING DECISIONS have a huge impact on health and well-being. These decisions have been detrimental to people's health and well-being to date.</p> <p>EDUCATION -</p>
<p>no road through Rimrose - better to be unemployed rather than killed by yet more roads</p>
<p>Employment development is essential for growth but you don't necessarily need to "regenerate" a whole area. Investment in current housing stock & residents is vital too.</p>
<p>All of them are important and to some extent interlinked so it is difficult to prioritise between them. I would be more inclined to look at geographical targeting of resources to reduce inequality.</p>
<p>Need to beat the vicious circle. jobs by Strand lost, less people use Strand, more people lose shop work jobs. shops close. Thus the Council needs to find activities that will bring people back. People will head to Liverpool. Better, safer environment, little difference in public transport costs (why get off at the Strand) . Cinema mentioned but Switch Island and Liverpool One Odeon both have their strong attractions.</p>
<p>New housing should include possibly up to 50% for social housing, as this will encourage the local community to believe that the Local Authority also has their interest in mind. Education is very important and the work Sefton is engaged with for apprentices are encouraging. Perhaps Sefton MBC could also enter the field of recruitment as a third party not for profit agency. Tackling health and well-being is a laudable aim but would the LA take a view on a concentration fast food, off licence and betting outlets in a particular area. What type of free enterprise would you be happy to see develop? However, on the plus side Sefton have an Active Workforce team that vigorously promotes the health and well-being of its staff and acts as an encouragement to the wider public. The biggest challenge for Sefton in the coming decade will be elderly care which perhaps is not quite right and with funding pressure may get much worse. The need for more, better paid, high quality jobs is a marvellous aspiration and the creation of a highly skilled and educated workforce is a prerequisite together with a business friendly environment, so it is to be hoped that such groundwork will be sufficient incentive for the type of employers that are sought. Exeter for example has a Scientific and technology Park created for exactly such employers. Other authorities may had tread this path before. Those who live and work in Sefton appreciate the quality of the area and the tourism industry does its share to promote itself. Sefton put great effort in staging events e.g. Flower Show, Air Show, Fireworks Competition etc. and should be proud of what is achieved.</p>
<p>Form closer links between business community, local authorities and academic institutions via LEP Make more effective use of our assets</p>
<p>Regeneration initiatives need to be much more actively pursued, particularly by the use of brownfield land and in Sefton's town and local centres. The potential for economic development arising from the Superport investment needs much fuller recognition and related to infrastructure improvements from TfN's 'Strategic Transport Plan'. The implications (and opportunities!) of Sefton's rapidly ageing population need spelling out.</p>

Appendix 3

Comments on the Priority Action Areas

<p>Businesses are important for the economy</p>
<p>Bring more money/training to the Southport area. Reduce charity shops - encourage more business</p>
<p>To attract and support SME cheaper or frozen rents and rates in The Strand and Marion Square Shopping centres</p>
<p>It is hard to rank them as they are all important however I think that growing existing businesses is the key.</p>

Agenda Item 10

<p>again broadband is key here, not bothered by town centres, its fast broadband which is key, and not BT, we want to see small independents offering Sefton residents and businesses a world class connection</p>
<p>All areas scoring 3 would be totally dependent on the type of new investment and re-profiling. NO engineering in residential areas. We have commercial enterprises occupying beautiful green spaces in Kew and heavy engineering (B2 status) squeezed into Slaidburn Industrial estate with all the attendant activities metres from residential housing. What foresight was given to people's ' Health and well-being' during the planning process on this occasion and there's little ability to rectify these errors. There seems little evidence that Sefton council has recognised the connection between approval of historical planning applications and health and well-being.</p>
<p>Maghull town centre badly needs renovating</p>
<p>One of the best things that happened in recent years, was the NAGs, this gave the communities the support and options of what happened in their area, I am referring to the devolved budget were local people sat on monthly meetings with council staff & local councillors and decided what was needed most in their neighbourhood e.g. Alley gates.</p>
<p>Again who could disagree, but as before council policy requires a complete rethink in its relationship with the private sector. Who decided to have 1 to 5 with 5 as the highest and then 1 to 7 with 1 being the highest? This is a serious document not a test.</p>
<p>All of the above is needed but not at the cost of more traffic</p>
<p>As a local business owner in Southport who has invested to revitalise buildings and now employs 25 local people I am aware the town is at a critical cross roads with regards to economic development. We cannot miss this opportunity as I fear the town may pass a point of no return. We need to attract external, private, creative investment to bring people back into the town. Make the most of our amazing usps and tell the rest of the country</p>
<p>These tick box questions are misrepresenting the responses and whilst useful to an extent they run a risk of over simplifying the principles</p>
<p>No consistency in question ranking - in question number 1 - 1 was ranked low and 5 was ranked high - in this question 1 is ranked high and 7 is ranked low. Likely answers will be mixed up as a result.</p>
<p>Explore the work of 'Challenger Banks' as case studies & who have supported investments in Sefton & Liverpool City.</p>
<p>A difficult list to rank. Much depends on the capability of existing Council staff and partnerships they work in.</p>
<p>Do not agree with over reliance on community to deliver projects at the expense of specialist workers employed by the public service. It will result in poorer outcomes and patchy unreliable service provision. Invest in the public sector and secure jobs for the younger generation.</p>
<p>Section 2 of the strategy refers to areas of growth: the Port and surrounding area; Dunningbridge Road; Southport Business Park. What are the plans for Maghull and Formby? With regard to Southport, what will be the employment mix? There are two further employment areas: Crowland Street and Salidburn Crescent. Crowland Street certainly falls into the category of "older stock and sites to be upgraded or replaced." placing undue train on Slaidburn Crescent. This is a very small employment area, which now has B2 industries with hazardous waste situated no more than ten metres from residential property. Point 2.22 states: "The health and well-being of Sefton's residents are tightly bound into the area's economy." The noise and air pollution hazards of industry at Slaidburn Crescent have huge potential for a detrimental effect on all those living cheek by jowl to the factories. Point 2.12 states that there is also an undersupply of incubator/start up space. I would suggest that Slaidburn Crescent is an ideal area for start-up and footloose industries. It is most certainly the wrong location for B2 industry.</p>
<p>The emphasis on community led social enterprises is commendable but these will tend to be worse paid than private companies. I also worry about how committed they will be to productivity and quality of output. Too many firms working as contractors to local</p>

<p>government are very inefficient with poorly trained staff. How will Sefton ensure it gets value for money? The acquisition of the Strand is controversial and the strategy really says nothing about how this will be justified in the long run.</p>
<p>Main focus on getting business ready first. Close links/relationship/partners with local education can then follow to get people educated and supported into the industry. Digital start-ups getting financial help from Sefton (even through reduced rate office space) should enter into a partnership to support education in the local area.</p>
<p>The action areas are all important. The Bootle designation as Liverpool's Northern Gateway (4.12 and 5.26) could perhaps be better explored in relation to the post-industrial change of the area from blue collar dock work, to 1960s office roles and beyond to the potential to better exploit a housing offer to suit commuter demand, given the area's excellent journey times into Liverpool as an accessible, inclusive location. This should build on the natural and transport assets connecting north and south. This strategy should focus on the activities relevant to the borough and build on the existing recognised investment strengths. There is limited mention of the increasingly commuter based economy in 2.5. If further explored, this could inform a focus on quality of life offer that might further realise stated ambitions in 4.29. This could tie in well to the focus on higher value housing stock (5.13) and canal-side housing (5.24). The limited mention of food (4.13 and 4.41) could be linked to provide a focus on agriculture, local food provenance and niche quality food retail offer.</p>
<p>I am concerned about the term 're-profiling Sefton' which suggests ,to me, that its identity is to be changed. Sefton spans a large area with varying needs, uses and identities. Southport is not identified as an industrial area and I do not want to see heavy industry developed in this area. We have plenty of natural attributes which should be drawn on and enhanced (what will happen when the beach has finally disappeared) The beach has been one of Southport's major assets and although there has been solutions put down to kill off the grass over the years I have never seen (in 40 years)any mechanical device (like abroad) to clean the sands. Not all is negative and there have also been some wonderful retail and service developments .However, I'm opposed to industrial growth- this is not our identity and which is why I have marked down the development for new businesses as the statements are ambiguous and do not identify specific investment type.</p>
<p>Whilst I agree with the terms 'investment' 'developing new enterprise ' I cannot score some of these points higher as these terms are understandably still ambiguous. I agree with more commerce but NOT the development of heavy industry. Talk of Southport town centre and how its ' gone down' has been a talking point for years and understandably shopping trends, rates etc have had an impact on the town centre shops. But constant junk mail inside empty shops? Filthy shop fronts? A' cemetery 'outside of the station (coffin like seats) - fly tipping in Wright street and Bath street. Copious amounts of litter on a path between Morrison's petrol station and the swimming baths (the council stated they do not know who has responsibility for this?) Prestigious hotels and holiday camps taken over by a hotel group that expects paying guests to reside in near squalor. The statement 'repositioning' and ' reprofiling' concerns me - what do these terms mean?</p>
<p>There is not enough investment in shopping & living in the area. E.g. vast improvements are needed in Maghull town centre. Higher quality shops, restaurants & social meeting places.</p>
<p>All of them are important and to some extent interlinked so it is difficult to prioritise between them. I would be more inclined to look at geographical targeting of resources to reduce inequality</p> <p>Create an educated and skilled workforce for employers and they will stay if this is available. Don't spend too much time reconfiguring the council. Energy should be concentrated to serve those that require support and not drained through constant reorganisation. The average 'man in the street' may be forgiven for thinking many of the above actions are that same activity dressed up in different descriptions. Earlier outlines described things quite clear Educate, Improve skills, Invest in Housing and Enterprise, Improve digital access and Improve transport and infrastructure.</p>
<p>The emphasis must be on wealth creation</p>

Agenda Item 10

The Council has a vital role to play by working in partnership with Regional, City Regional and local organisations through: Use of its own assets (Asset Management Strategy); a role in land assembly; use of CPO's where necessary; as a 'broker' and 'enabler'; through the use of prudential borrowing; maximising funding from external sources; preparation of Development/Planning Briefs and SPD's.

Report to:	Cabinet	Date of Meeting:	26 July 2018
Subject:	Housing DevCo – Land Assembly		
Report of:	Head of Commercial Development – Christian Rogers	Wards Affected:	All;
Portfolio:	Cllr. Patricia Hardy		
Is this a Key Decision:	Yes	Included in Forward Plan:	Yes
Exempt / Confidential Report:	No - but the Appendices to the report are NOT FOR PUBLICATION by virtue of Paragraph 3 of Part 1 of Schedule 12A of the Local Government Act 1972. The Public Interest Test has been applied and favours the information being treated as exempt.		

Summary:

The approved Business Case for Sefton Council’s Housing Development Company proposes numerous sites for possible development. In some cases, in order to maximise the viability and potential returns of a specific site, the Business Case recognises the need for land assembly through the strategic acquisition of sites. This report proposes the acquisition of a site.

Recommendation(s):

(1) To approve the recommendations in Appendix 1.

Reasons for the Recommendation(s):

The reasons for this recommendation are detailed in the attached commercial proposal at Appendix 1.

Alternative Options Considered and Rejected: (including any Risk Implications)

An options appraisal is contained in the attached commercial proposal at Appendix 1.

What will it cost and how will it be financed?

(A) Revenue Costs

Should the acquisition of the site proceed, the Council will incur debt charges based upon a 5 year loan. However, the anticipated income stream following the sale of houses will be used to finance the borrowing cost.

Agenda Item 11

(B) Capital Costs

Acquisition of the site will require the Council to borrow from the Public Works Loan Board.

Implications of the Proposals:

Resource Implications (Financial, IT, Staffing and Assets): All resource implications are contained within the attached commercial proposal at Appendix 1.
Legal Implications: This Cabinet Report complies with the requirements of Paragraphs 3 of Part 1 of Schedule 12A of the Local Government Act 1972.
Equality Implications: There are no equality implications.

Contribution to the Council's Core Purpose:

Protect the most vulnerable: N/A
Facilitate confident and resilient communities: In creating more good quality housing in viable locations, the Council can enable more Sefton residents or people moving to Sefton to enter into the housing market and thus help diversify it. The ability of a diverse mix of buyers to obtain housing in the borough will not only inspire confidence through being able to set down roots here, but also create a more resilient community of people at different stages in their life and on the property ladder. The proposed land assembly allows for the creation of a larger and more viable site, which in turn support the Council in achieving these goals.
Commission, broker and provide core services: Projected returns to the council, as sole shareholder, from the Housing DevCo will provide revenue to contribute towards service provision. The proposed land assembly will help to maximise that return.
Place – leadership and influencer: Quality housing is a significant contributor to building a sense of place. The land assembly proposed will help to maximise the number of quality houses developed.

Drivers of change and reform:

Improving physical infrastructure generally and housing in particular is a significant contributor to and catalyst for change in terms of improved outcomes for Sefton residents. The proposed land assembly will help to maximise these benefits.

Facilitate sustainable economic prosperity:

The new quality housing that will be delivered by the Housing DevCo will make a significant contribution to the local economy both in terms of local construction and engineering employment opportunities but also providing more housing choice to attract people who wish to live and work in Sefton and the wider city region.

The proposed land assembly supports the Housing Development Company in achieving these goals.

Greater income for social investment:

Through the development and sale of housing, the Housing DevCo will deliver new revenue to the council for social reinvestment.

Cleaner Greener

The housing developed on the larger site will be fully compliant with all national and local regulations (including Building and Planning regulations) as well as Sefton cleaner and greener policies.

What consultations have taken place on the proposals and when?

(A) Internal Consultations

The Head of Corporate Resources (FD 5216/18) and Head of Regulation and Compliance (LD 4440/18) have been consulted and any comments have been incorporated into the report.

In addition the report author has worked closely with a range of officers in the Council including, the Executive Director.

(B) External Consultations

A number of specialist professional consultants have advised on the business case for the Housing DevCo (which was approved by Cabinet in October 2017), including, Ridge, Keppie Massey and Arcadis. This included assessment of the acquisition proposed in this report.

Agenda Item 11

This advice included detailed site investigations and risk assessments as well design options and valuations.

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:

The following appendices are attached to this report:

Appendix 1 – Commercial Proposal

Background Papers:

Please refer to the Housing Development Company Business Case.

1. Introduction/Background

- 1.1 The Sefton Local Plan identifies the need for 11,000 new housing units (all types and classifications), to be built by 2030 at a rate of circa 650 units per year.
- 1.2 The private and third sector already operate and provide housing at all levels, however supply is in shortfall currently. Access to land identified in the Local Plan requires a different approach to risk and the Council is in a good position to lead on delivering on these sites (if proved viable) particularly where there are environmental or community sensitivities that require thorough engagement and consultation.
- 1.3 Where the Council does elect to lead, develop, and deliver housing it will do so with due consideration to each community that will be affected, after significant appraisal and consultation with communities, and managing the consequences of unforeseen issues.
- 1.4 The attached commercial proposal for land assembly will support the objectives of the Housing DevCo, which ultimately supports the realisation of Sefton’s Vision 2030.