

## **Scrutiny Management Board**

**Wednesday 12 November 2025**

### **PRESENT:**

Councillor Coker, in the Chair.  
Councillor McLay, Vice Chair.  
Councillors Allison, Freeman, Murphy, Raynsford, Ricketts, Steel and Stevens.

Apologies for absence: Councillors Holloway (Raynsford Substituted), Blight (Stevens Substituted) and Poyser (McLay Substituted).

Also in attendance: Paul Barnard (Service Director for Strategic Planning and Infrastructure), Councillor Sue Dann (Cabinet Member for Customer Experience, Sport, Leisure and HR and OD), Elinor Firth (Head of Public and Partner Relations), Thomas Fowler (Programme Manager), Ian Trisk Grove (Service Director for Finance), Ross Jago (Head of Devolution and LGR), Tracey Lee (Chief Executive), Emmanuelle Marshall (Project Manager for Local Government Reform and Devolution), Councillor Chris Penberthy (Cabinet Member for Housing, Cooperative Development and Communities), Chris Squire (Service Director for HR and Organisational Development), Councillor John Stephens (Cabinet Member for Strategic Planning and Transport), Paul Stephens (Head of Corporate Performance), Olliver Woodhams (Head of Finance), and Elliot Wearne-Gould (Democratic Advisor).

The meeting started at 9.30 am and finished at 12.54 pm.

*Note: At a future meeting, the Panel will consider the accuracy of these draft minutes, so they may be subject to change. Please check the minutes of that meeting to confirm whether these minutes have been amended.*

### 27. **Declarations of Interest**

There were no declarations of interest made.

### **Appointment of a Vice-Chair**

The Board agreed to appoint councillor McLay as Vice-Chair for this particular meeting.

### 28. **Minutes**

The minutes of the meeting held on 24 September 2025 were agreed as a correct record.

### 29. **Chair's Urgent Business**

There were no items of Chair's urgent business.

30. **Plymouth City Council's Draft Local Government Reorganisation Proposal for Devon**

Councillor John Stephens (Cabinet Member for Strategic Planning and Transport (Deputising for the Leader)) introduced the report and discussed:

- a) Councillor Stephens was attending in place of the Leader of the Council, who was unwell. The Board sent its best wishes to the Leader for a speedy recovery;
- b) The proposal responded to the Government's statutory invitation to bring forward local government reorganisation proposals for the whole of the existing Devon area. The Council was required to submit its proposal by 28 November 2025, with Scrutiny's comments feeding into Cabinet and City Council consideration on 24 November 2025;
- c) This was a period of significant uncertainty and concern for many dedicated local government employees across Devon. Their professionalism and commitment to public service during such a challenging time were deeply respected;
- d) The current two-tier system operated by neighbouring authorities created confusion, duplication and artificial barriers. The Government had given the area a rare opportunity to reduce this fragmentation and improve joined-up public services for residents;
- e) Plymouth, Exeter and Torbay had worked together to propose four unitary authorities across the Devon area:
  - i. an expanded Plymouth;
  - ii. a new and expanded Exeter;
  - iii. an expanded Torbay;
  - iv. a new Devon Coast and Countryside authority;
- f) For Plymouth, the proposal sought a modest boundary extension to include 13 South Hams parishes which already formed part of Plymouth's functional economic area (places where people worked or learned in Plymouth and regularly used facilities that only a city could provide);
- g) The proposed extension would add approximately 30,000 residents to Plymouth's existing population of approximately 270,000, bringing the new authority to approximately 300,000 residents;
- h) The proposal was not an "empire building" exercise or "land grab", but an attempt to correct outdated boundaries which currently cut through growing communities and prevented proper strategic planning for housing, transport and infrastructure;

- i) The existing Joint Local Plan with South Hams demonstrated that these areas already operated as a single functional area and the proposal would make the governance arrangements match the lived reality;
- j) The benefits of the proposed structure went beyond council efficiency and were central to unlocking wider public service reform across health, employment and community safety;
- k) Major programmes, such as the Connect to Work plan and the development of integrated neighbourhood teams for health, could not be delivered by any single agency, but instead required the ability to convene partners such as the NHS, police and skills providers to tackle complex challenges together;
- l) Under the current two-tier structure, there was often no single body capable of exercising that systems leadership effectively across the whole place. The four-unitary model would create authorities with sufficient strategic scale to be credible convening partners, but still local enough to understand and deliver what communities actually needed;
- m) The Council was taking a genuinely developmental approach to community engagement and neighbourhood governance, proposing to establish neighbourhood networks from vesting day, but recognising that empowerment would look different in different places;
- n) The Council was committed to working with communities to co-design neighbourhood arrangements rather than imposing a rigid model. The Government was expected to bring forward detailed regulations about neighbourhood governance, powers and duties, which Plymouth would work with flexibly to support locally appropriate solutions whilst maintaining consistent standards across the expanded area;
- o) The approach would mean continuous dialogue with communities, not just occasional consultation, and would aim to give people real influence over decisions that affected them;
- p) The proposal treated Plymouth as a continuing authority, thereby minimising transition costs and risks compared to creating a wholly new council;
- q) The alternative to the proposed reorganisation risked a path of “managed decline” in which Plymouth, if locked within its existing boundaries, would struggle to grow, plan strategically or fund the services residents deserved. This would not only affect existing residents, workers and students in the city, but also those living in the 13 parishes Plymouth proposed to serve as the governing authority;
- r) The proposal rested on three key arguments:
  - i. that decisions should be taken closer to communities rather than in distant council chambers, and that the model would protect the culture

and identity of all communities in an expanded Plymouth through strong local decision-making;

- ii. that the two-tier system had “failed Devonians”, cost too much, and left many core services in significant difficulty with serious impacts on residents;
  - iii. that Plymouth needed room to grow, to capitalise on Freeport and Langage opportunities, and to secure the full benefits of “Team Plymouth” and the defence dividend;
- s) Councillor Stephens noted his thanks to Council staff who had contributed to the submission, including those who had volunteered to facilitate engagement sessions with the 13 South Hams parishes, six localities across Plymouth, and a wide range of stakeholders and interest groups.

Tracey Lee (Chief Executive) added:

- t) This work was about shaping the structure of local government for the next 50 years, and it was difficult to imagine a more important decision in terms of how councils were organised;
- u) The way councils were organised mattered because of the leadership they provided to communities and the way in which public services were delivered on the ground;
- v) Concerns that if councils over-expanded there were risks of losing grip, pace and quality of delivery, whereas if they were too small there would be challenges with viability. The four-unitary model sought to establish an appropriate balance;
- w) The proposed approach meant four councils within the Devon system. While this would result in one more Director of Children’s Services and Director of Adult Services than at present, it would also significantly reduce the overall number of councils and therefore other statutory senior posts across the area;
- x) The proposal had been developed in partnership with Exeter and Torbay. The proposition was exactly the same as Exeter’s submission and closely aligned with Torbay’s, with the only difference being that Torbay proposed to remain on its existing boundary. This alignment demonstrated a clear sense of unity among the urban areas of Devon regarding the preferred way forward;
- y) Changes to local government boundaries would need to be aligned with evolving place-based arrangements in health and other services rather than treated in isolation;
- z) In her view, the Council was coming to the end of “phase one” of the process (developing the proposal) but there would be many further phases

ahead if Government decided to proceed, and that it was therefore vital to submit the best possible proposal, aligned with partners' submissions.

Ross Jago (Head of Devolution and Local Government Reorganisation) added:

- aa) The Council first received formal notification that Local Government Reorganisation (LGR) was likely in December 2024, when Government released its white paper, and that this had been followed by a statutory invitation requiring proposals for the whole Devon area;
- bb) The Government had been very clear that the abolition of the two-tier system was its stated policy intention, and therefore, change was guaranteed for Devon;
- cc) Plymouth had developed an interim plan which was agreed by Council in March 2025, and had undertaken significant stakeholder engagement including a parish conference and targeted engagement across South Hams and the city, alongside work with all Devon councils via a shared data room and regular officer meetings;
- dd) The Government's criteria for assessment included:
  - i. proposals covering the whole of Devon;
  - ii. authorities of the "right size". Guidance indicated an ideal population around 500,000, but with flexibility to consider local alternatives;
  - iii. prioritisation of high-quality, sustainable public services;
  - iv. evidence of joint working;
  - v. support for future devolution arrangements;
  - vi. strengthened community engagement and local accountability;
- ee) In practice, reaching 500,000 residents in an authority built around Plymouth would have required a very extensive and, in his view, unrealistic boundary extension. Plymouth therefore argued that around 300,000 residents was the "right size" for a resilient, viable unitary authority, comparable to several metropolitan authorities in Greater Manchester and London;
- ff) Devon was a complex mosaic of different communities with varying levels of deprivation, connectivity and need. The four-unitary model was deliberately designed to reflect those differences;
- gg) The Government had required Plymouth to bring forward a "base case" proposal based strictly on whole district boundaries under the Local Government and Public Involvement in Health Act 2007, while also allowing for more complex modifications where there were compelling reasons;

- hh) The legally compliant base case effectively replicated the current structure (Plymouth and Torbay as unitary authorities, Exeter as a district within a larger Devon), leaving Plymouth and Torbay with smaller populations and weaker tax bases, and creating a very large county-wide authority for the rest of Devon;
- ii) Other options proposed in Devon included a single large unitary, and a “1-4-5” model promoted by districts, both of which left Plymouth stranded on its current boundary and created significant imbalances in tax base and population;
- jj) The modified four-unitary model recommended by officers proposed:
  - i. an expanded Plymouth (current city plus 13 South Hams parishes);
  - ii. an expanded Exeter (Exeter plus surrounding parishes across parts of Teignbridge, East Devon and Mid Devon);
  - iii. an expanded Torbay (on its existing boundary but with an expanded functional role);
  - iv. a new Devon Coast and Countryside authority tailored to rural and coastal communities;
- kk) This model delivered four resilient and viable unitaries with more balanced populations and tax bases, coherent functional economic areas, and clearer urban–rural distinctions to support tailored service delivery;
- ll) The proposal emphasised neighbourhood networks as the core of local governance, but deliberately avoided being overly prescriptive about their final form until Government regulations on powers and duties were published and further co-design with communities could take place;
- mm) Stakeholder engagement had included 19 public events, an online survey with approximately 11,000 website visitors, and 17 stakeholder meetings with public sector bodies and local institutions, alongside targeted parish and locality engagement. A comprehensive engagement report was included in the pack;
- nn) Feedback from South Hams parishes had highlighted concerns around rural identity, planning, infrastructure and potential domination by the city, while feedback from Plymouth had focused on growth, inclusion, and improved service outcomes, though with many common issues such as affordable housing, homelessness and access to schools;
- oo) There was broad recognition among partners that the removal of the two-tier system could be beneficial for the delivery of services, even where bodies were understandably cautious about endorsing particular boundary configurations at this stage.

Paul Barnard (Service Director for Strategic Planning and Infrastructure) added:

- pp) In addition to the Government's six criteria, Plymouth had developed a set of "Plymouth principles" in March 2025 to guide its thinking, which had been endorsed unanimously by Full Council with one abstention. The principles included the need for:
- i. a financially viable boundary change with appropriate population size;
  - ii. preservation of the character and identity of existing Plymouth neighbourhoods and communities in the extended area;
  - iii. respect for existing unitary and county boundaries;
  - iv. minimising organisational impacts on Dartmoor National Park;
  - v. using parishes as the basic building blocks for any boundary extension rather than relying solely on whole district lines;
  - vi. supporting Plymouth's long-standing growth agenda, including the Joint Local Plan with South Hams and West Devon, and the step-change expected from Team Plymouth initiatives, the dockyard, the proposed "town in the city" concept for the city centre and new housing growth;
- qq) The proposed extension into 13 South Hams parishes reflected these principles by aligning with the functional economic area and existing planning arrangements.

Oliver Woodhams (Head of Finance) added:

- rr) Officers had compared projected financial sizes of the proposed authorities with existing single-tier councils across the country, using graphical analysis contained in the financial appendix;
- ss) Officers had built a complex financial model using data from 2025/26 budgets and most recent statements of accounts, projecting forward three to four years into a future structure of councils which did not yet exist. As a result, there was a high degree of uncertainty in projections;
- tt) The model incorporated prudent assumptions about savings including moving from 11 councils to 4, estimates of transition costs, and the harmonisation of council tax bases, and used national expert advice on income projections (including Revenue Support Grant and business rates);
- uu) Under the modified four-unitary model, all four proposed authorities showed a modest surplus of income over expenditure in the medium term, whereas under the base case some smaller authorities, notably Exeter, and to a lesser extent Plymouth, faced more acute viability challenges, with modelled costs exceeding projected income;

- vv) Modelling suggested potential annual savings of around £6 million across the system in steady state, with transition costs of approximately £14.9 million (over several years), to be funded from one-off resources and repaid over three to four years through efficiencies;
- ww) Income predictions, particularly national funding streams and business rates, were inherently uncertain, but officers had adopted a prudent and cautious approach, avoiding some of the more ambitious assumptions used elsewhere in the country. This included not building in unproven savings in high-cost areas such as adult social care;
- xx) Officers had deliberately not included some speculative savings in the viability analysis, focusing instead on those that could be reasonably evidenced at this stage. External experts had been commissioned to validate key aspects of the modelling.

Elinor Firth (Head of Public and Partner Relations) added:

- yy) The Council had undertaken an intensive programme of engagement as part of the 'Big Community Consultation', including well attended in-person events in both Plymouth and the South Hams, online surveys, web content and targeted sessions with stakeholders;
- zz) While many residents in the South Hams had initially attended meetings expecting a predetermined decision, feedback indicated that residents felt genuinely listened to, with officers presenting a blank-page approach rather than telling communities what would happen;
- aaa) Some attendees remained opposed to the proposal but nonetheless felt the process itself had been fair and respectful, and that their views had been properly heard;
- bbb) Although demographic data for event attendees were limited, officers had observed a broader age mix, including younger people, than might traditionally be seen at parish-based events;
- ccc) The next phase of consultation would be the Government-led statutory consultation on whichever proposals Ministers considered viable;
- ddd) Officers had already launched detailed web pages explaining Plymouth's proposal in accessible language and intended to continue updating those pages, using questions and concerns emerging from communities to shape further content.

In response to questions, the Board discussed:

- eee) Concerns that councils were being asked to plan for the next 50 years while key policies, including the shape of Integrated Care Boards, SEND reforms, social care funding and elements of the devolution framework, were still changing or unknown;

- fff) Risks that the Government could ultimately choose a different model or design its own solution;
- ggg) Officers confirmed there were indicative national timelines and that areas ahead of Devon (for example Surrey and several priority areas) broadly appeared to be progressing within those timescales. There would inevitably be learning and adjustments as the national programme unfolded;
- hhh) Members recognised the inherent risk and ambiguity of planning in such a fluid environment, but accepted that local government was already managing multiple reforms and that LGR represented another, significant, but not unfamiliar, challenge;
- iii) Officers confirmed that they had carefully studied recent LGRs (including in Somerset and Wiltshire), that Plymouth had staff with direct experience from those areas, and that the Local Government Association and a former chief executive with LGR experience were supporting the work to avoid repeating known pitfalls, particularly in IT integration, HR and organisational design;
- jjj) Concerns about the cost of developing the proposal, with questions about how much LGR had cost Plymouth to date and the level of Government funding for this preparatory work. Officers confirmed that Plymouth had received approximately £40,000 from a Government fund shared equally between the 21 LGR areas, and that total Council expenditure on external support (excluding internal staff time) was estimated at under £100,000, with a conscious decision not to rely on large consultancy firms;
- kkk) Concerns that LGR could divert focus from day-to-day service pressures if not managed carefully. Officers emphasised that LGR was being treated as an opportunity for public service reform, referencing parallel work on new neighbourhood working arrangements, integration with health, SEND reforms, and the Council's future operating model, stressing that Plymouth would remain an ambitious, improvement-focused authority whatever the outcome of the Government decision;
- lll) Queries around the transparency and robustness of financial assumptions, particularly the projected £6m annual savings and £14.9m transition costs. Members requested clearer evidence-based information, identifying which assumptions were price-sensitive, which were volume-sensitive and which were driven by specific efficiencies. Officers reiterated that the Financial Appendix already provided a detailed breakdown of the modelling and underlying data, but accepted that further explanation of key assumptions, especially around savings, income forecasts and transition costs, could be added to support public and member understanding;
- mmm) Concerns about the scale and composition of the Devon Coast and Countryside authority and the risk that larger authorities might dominate future devolution negotiations, leaving Plymouth as a "minor partner" if it remained on its current boundary. Officers repeated their view that the

base-case model and some alternative proposals created significant imbalances in population and tax base, whereas the modified four-unitary model offered a better balance of voice between urban and rural areas and a stronger position for Plymouth within any future mayoral or combined authority framework;

- nnn) Questions were raised regarding potential gaps in consultation, particularly in relation to younger people and under-represented groups in parishes. Officers acknowledged limitations in the demographic data from engagement events but noted that younger people had been more present than expected, and that the focus between now and Government consultation would be on clear, accessible communications and targeted outreach, rather than attempting to re-run the same consultation process;
- ooo) Concerns from some members and residents that communities such as Ivybridge or rural parishes might perceive a mismatch between their identity and inclusion in a city council area. Officers noted that previous boundary changes, notably the incorporation of Plympton and Plymstock, had prompted similar concerns, but those areas now felt firmly part of the city while retaining distinct identities. The proposed neighbourhood network model, combined with future electoral boundary reviews by the Local Government Boundary Commission, would be key to protecting local identity and ensuring fair representation;
- ppp) Feedback from some residents in South Hams that while they valued their rural character, their daily lives and service use (e.g. work, education, leisure and health services) were closely tied to Plymouth, particularly around transport links, and that these real patterns of movement and service use underpinned the functional economic area case;
- qqq) Questions were raised about whether Devon councils had considered collectively refusing to participate in LGR, and what the implications might have been. Officers confirmed this had been considered but that there had been a real existential risk for Plymouth that other proposals could envisage the abolition or absorption of the city within a larger Devon unitary if Plymouth did not put forward its own case;
- rrr) Members explored the risk of a “mega Devon” option imposed by Ministers, effectively abolishing Plymouth as an authority, and sought reassurance that the proposal made a strong political and technical case against this scenario. Officers advised that while Ministers had powers to determine structures and had, in previous LGR rounds, asked the Boundary Commission to develop alternative options, the current national context, tight timelines and the explicit requirement for locally developed proposals made it unlikely that Government would design a wholly new un-consulted option, although this could not be ruled out entirely;
- sss) Concerns regarding council tax harmonisation, local housing allowance and other financial mechanisms across expanded boundaries, with questions about how these would be managed in practice and over what timescale.

Officers explained harmonisation of council tax was a legal requirement when councils merged and that, for modelling purposes, they had assumed harmonisation to an average rate in the first year of the new authorities, noting that actual decisions would be a matter for future administrations at the time of implementation;

- ttt) In respect of Local Housing Allowance (LHA) rates, officers had assumed no change in the immediate term and had apportioned current costs using population-based drivers, recognising that any future harmonisation or change would be a relatively small factor compared to the overall scale of LGR finances;
- uuu) Officers agreed communications needed to stress the shared benefits, including improved bus services, integrated planning and climate-conscious travel options, and confirmed that Plymouth would continue proactive communications in addition to the formal Government consultation.

The Board agreed:

1. To note the content of the Plymouth City Council Draft Local Government Reorganisation Proposal for Devon;
2. To recommend that the 'Plymouth principles' for local government reorganisation set out in the options appraisal be broadened to apply to the whole of Devon;
3. **Action:** To request that Plymouth's LGR Communications Plan is reported back to the Scrutiny Management Board prior to the Government's statutory consultation period, expected to be in 2026.
4. **Action:** To request that the financial modelling included in the proposal be updated to include enhanced detail of assumptions made in relation to the savings, costs and transition expenses in order to provide further transparency on the methodology used for the local government reorganisation proposal.

### 31. **Plymouth City Council People Strategy**

Councillor Sue Dann (Cabinet Member for Customer Experience, Sport, Leisure and HR and OD) introduced the Plymouth City Council People Strategy and discussed:

- a) The People Strategy had previously been reported to the Scrutiny Management Board as "in development" and was now presented in draft form for pre-decision scrutiny prior to Cabinet consideration in December 2025;
- b) Development of the strategy had been highly collaborative, with over 300 conversations undertaken by the Service Director for HR and Organisational Development across all levels and directorates, making it the most co-produced People Strategy the Council had brought forward;

- c) The strategy reflected the significant challenges and opportunities facing the Council as an employer, including Local Government Reorganisation (LGR), the defence deal, the Team Plymouth programme, plans for a new town, an ageing workforce, persistent recruitment and retention issues, and anticipated changes arising from digital technology and new ways of working;
- d) The Council's workforce represented the "front-facing public service" of Plymouth, with every resident affected by how teams performed, whether through refuse collection, planning applications or other services, and that it was therefore essential to look after staff as well as residents;
- e) Management and leadership development programmes had already enabled over 100 staff to achieve Level 5 qualifications, with a further cohort in progress, and a Level 3 programme underway to "grow our own" talent to address recruitment, retention and training challenges;
- f) The Council had invested in its Digital Academy, with nearly 50 staff undertaking AI and digital qualifications, ensuring the workforce was already looking towards the future;
- g) The strategy was firmly rooted in "Plymouth as a place", reflecting the fact that most staff both worked and lived in the city and therefore directly benefited from improvements to services and outcomes;
- h) The strategy and supporting report before the Board set out the context, consultation findings and key proposals. The draft had already been discussed at Cabinet Planning and welcomed by Trade Union representatives, one of whom had commented that a positive shift in learning, development and culture was already noticeable among staff.

Chris Squire (Service Director for HR and Organisational Development) added:

- a) Design work had been undertaken in-house to align the strategy with the Council's updated corporate branding, including the "Horizons are bigger here" imagery and contour-style lines based on the footprint of Council buildings;
- b) The document deliberately used photographs of real staff rather than stock images, with any remaining stock images being replaced once appropriate staff images and permissions were confirmed;
- c) The strategy had been shaped by workshops and discussions with managers and staff at all levels, across all directorates, alongside ongoing engagement with Trade Unions, ensuring that the document reflected the lived experiences and priorities of the workforce;
- d) The strategy was closely aligned with the city's Economic Strategy, including major planned investment at Devonport Dockyard, which created substantial

opportunities for Plymouth, but also posed acute workforce and pay-related challenges as the Council competed for skills;

- e) Approximately 50% of the Council's workforce were aged over 50, a fact that underscored the importance of effective workforce and succession planning and of deepening relationships with schools, colleges and universities through work experience, internships, supported internships and apprenticeships;
- f) The Council had made strong use of its apprenticeship levy, investing it in new starters and upskilling existing staff, and had not returned any levy to the Treasury for around 15–16 months, while also transferring a portion to external providers, typically in the social care sector;
- g) The Digital Academy formed an important strand of the strategy, with an initial cohort of around 40 staff undertaking data and AI-focused apprenticeship programmes funded through an apprenticeship levy transfer from Microsoft. Planning was underway for a second cohort and additional digital bootcamps to spread digital skills across the organisation;
- h) The People Strategy was structured around four pillars: Plymouth People, Plymouth Place, Plymouth Passion and Plymouth Purpose. The 'purpose' pillar related to role clarity, workforce planning, succession planning and performance management, ensuring that staff clearly understood what was required of them;
- i) The strategy was intended to function both as a framework for internal development and as a recruitment and retention tool, with its positive, aspirational tone designed to attract and keep talented staff in a highly competitive labour market;
- j) The strategy emphasised clarity, collaboration, development and connection to Plymouth's communities.

In response to questions, the Board discussed:

- k) Concerns informed by previous HR experience, that strategies could sometimes be developed and then infrequently used. Members expressed desire for Scrutiny to receive regular oversight updates on progress and outcomes;
- l) Observations that existing measures in the strategy referred primarily to monitoring by the Senior Leadership Team, and the suggestion that elected members should have a route to scrutinise whether the strategy was succeeding, drawing on the considerable, often informal feedback councillors received from both residents and staff;
- m) Links between the strategy and the Civic Engagement Agreement. Officers confirmed that the Civic Engagement Agreement had been signed by four anchor institutions: Babcock, Plymouth City Council, the University of Plymouth and University Hospitals Plymouth. The agreement set out the

organisations' shared civic responsibilities in relation to recruitment, retention, community engagement and, in some cases, procurement;

- n) **Action:** Officers to circulate the Civic Engagement Agreement and briefing to enable members to question large employers in their wards about what they had done under the agreement to support local people;
- o) The strategy was already being supported by work such as the Council's neurodiversity staff group, which had highlighted that recruitment processes could be difficult for neurodivergent applicants, prompting changes within both the Council and Team Plymouth partners. Similar work was underway around corporate parenting and opportunities for care-experienced young people to access Council jobs;
- p) Concerns around how the Council would champion health, safety and wellbeing in the workplace despite a reliance on vacancy savings and vacancy-related budget measures, noting that these placed additional pressure on existing staff covering vacant posts. It was clarified that health and safety was the top priority, and that staff numbers had in fact increased slightly over the previous year. Significant pressures remained due to rising demand in adults' services, children's services and homelessness, all of which impacted staff workloads;
- q) Confirmation that the Corporate Management Team regularly discussed workforce pressures, budget challenges, and their implications for staff, including mental wellbeing;
- r) Concerns regarding hybrid and home working, particularly perceived disparities between frontline staff and office-based staff who could work remotely, and the risk of isolation for young apprentices and new starters working from home;
- s) Clarification that the intention of the policy was not to occupy office space, but to ensure staff presence where visibility, collaboration and connection to Plymouth were needed. Teams were trialling structured approaches to decide which tasks were best done together in person and which could be done from other locations;
- t) Reassurance that working solely at home was not considered appropriate, especially for apprentices and new starters, who needed to learn in a collaborative office environment, and that this principle was explicitly embedded within the tools being used to support teams in planning hybrid working arrangements;
- u) Acknowledgement that flexibility still had value, particularly in helping the Council compete with employers such as Babcock in a tight labour market and for staff with caring responsibilities, but that this must be balanced against organisational needs and fairness to frontline staff;

- v) Recognition from officers that more than half of the workforce could not work from home (for example, waste crews, street cleansing staff and library staff), and examples of how flexibility was offered in different forms to those staff, such as four-day working weeks based on compressed hours;
- w) Confirmation that a separate Hybrid Working Strategy was being developed and would return to the Board for detailed scrutiny, following consultation with Unions and staff, as set out in the work programme;
- x) Assurances that staff involved in particularly challenging pieces of work, such as the Armada Way scheme, had received targeted support, and that the Council remained committed to offering support where staff needed;
- y) Queries around how environmental and sustainability impacts of AI were being explained to staff as AI use expanded within the Council. It was acknowledged that this area had not yet been addressed in detail within staff communications or training, but that this would be further considered;
- z) Queries about how the success of the strategy would be measured, and a request for clear key performance indicators (KPIs), dashboards and regular reporting so Scrutiny could see progress over time, including in relation to recruitment, retention, sickness, training, hybrid working and equality, diversity and inclusion (EDI). Officers confirmed that core workforce indicators such as sickness, staff turnover and agency spend were already monitored and were currently improving, and that further work would link these metrics to initiatives under the People Strategy;
- aa) A new HR system was being implemented which would significantly improve recording and reporting of staff training, health and safety compliance and other success measures, enabling better dashboards and data for both management and Scrutiny;
- bb) Emphasis that due to the competitive labour market in Plymouth, the Council needed to measure and improve not only pay but job satisfaction, career development and the sense that staff were “making a difference”, particularly if it wished to “grow its own” workforce effectively;
- cc) Suggestions that productivity impacts should also be tracked where possible, particularly in relation to investment in skills, hybrid working and inclusive practices;
- dd) Clarification that the Council’s approach to AI was focused on using technology proactively and positively to reduce low-value administrative work and allow staff to spend more time on complex, people-facing tasks. AI had already been used to streamline Education, Health and Care Plan (EHCP) processes, enabling officers to better engage with parents and children, leading to positive feedback;
- ee) Clarification that many of the performance indicators and reports which would show the impact of the People Strategy were already in the public

domain, and that the key task was to connect people-management work to shifts in those publicly reported measures.

The Board agreed:

1. To note that the People Strategy remained in draft form, pending comments from Scrutiny and Cabinet approval;
2. To support the new People Strategy for Plymouth City Council;
3. To request that the People Strategy return to Scrutiny at suitable intervals to enable ongoing scrutiny of progress, performance and impact;
4. **Action:** To request that a briefing note on the Civic Engagement Agreement be circulated to members.

### 32. **City Help and Support**

Councillor Sue Dann (Cabinet Member for Customer Experience, Sport, Leisure and HR and OD) introduced the City Help & Support report and discussed:

- a) The item had been brought to the Scrutiny Management Board as part of preparations for future budget planning, as City Help & Support would significantly influence the Council's approach to service delivery over the coming years;
- b) There had been a sharp rise in demand and complexity of residents requiring help and support over recent years, which continued to place extraordinary pressure on Council services;
- c) Adult social care, children's social care, homelessness and SEND were experiencing escalating costs, and these pressures were structural and cumulative rather than cyclical, with new demand added each year and little scope for costs to fall in the next;
- d) Rising complexity in adult social care meant more people were entering the system and staying longer, resulting in higher per-person costs and greater overall pressure on budgets;
- e) Children's social care was facing unprecedented increases in placement costs, including high-cost residential care, with the Council often having limited control over market pricing or sudden changes in the needs of children entering care;
- f) Homelessness and temporary accommodation demand continued to rise due to the national housing shortage, with temporary accommodation and bed and breakfast usage now a significant and growing budget pressure;

- g) These demands were affecting people, not numbers, and the challenge could not be viewed solely as a financial problem. It required earlier interventions and more cohesive support to improve outcomes for individuals and families;
- h) Although the Council already delivered positive preventative work, the scale of demand meant the organisation required a new, collaborative, data-driven approach to shift the balance towards prevention;
- i) The City Help & Support programme would initially focus on internal Council activity but would, as it matured, expand to work more closely with partners;
- j) The programme aimed to ensure people were identified earlier, supported earlier, and prevented from entering high-cost crisis services where possible, enabled by better data, improved pathways and multi-disciplinary working;
- k) Early identification required drawing together information held across services including schools, housing, health and family support, to provide a more holistic view of risk and need;
- l) The approach aligned with the People Strategy, Children's Hubs, Health and Wellbeing Hubs, and new data insights being developed across the Council, all of which would contribute to stronger preventative work.

Thomas Fowler (Programme Manager) added:

- m) City Help & Support was a critical programme with a dual objective: improving outcomes for households and saving money through earlier, more effective intervention, creating a "win-win" for residents and the Council;
- n) The scale of the challenge required a whole-system response, as Plymouth residents faced increasingly complex circumstances, including trauma, poverty, insecure housing and rising social care needs;
- o) City Help & Support built upon a strong foundation of strategic work already underway across the Council, aiming to bring together previously separate initiatives into a coherent, preventative system;
- p) Extensive staff engagement had been undertaken as part of the programme, with many officers expressing frustration at the current reactive model and welcoming a move towards early help supported by better data, better processes and reduced silo-working;
- q) Staff had highlighted difficulties arising from siloed teams, fragmented data access and financing systems that did not easily support preventative approaches however, there was also strong optimism that improvements could be achieved;
- r) Significant preventative work was already taking place across the Council, including major reforms in children's social care, expanded health and

wellbeing hubs, improvements in adult reablement services and innovative programmes such as Changing Futures and the Plymouth Alliance;

- s) Despite strong pockets of good practice, existing work was not sufficient to meet the scale of current and future demand, as many initiatives remained small, isolated or pilot-based rather than coherently embedded across the Council. City Help & Support aimed to correct this by scaling effective practice, reducing fragmentation and embedding consistent preventative approaches across the organisation;
- t) The programme had identified several early projects, including developing a Single Citizen View to allow predictive analytics and early identification of households at risk of homelessness or exclusion from education;
- u) Multi-disciplinary teams aligned with neighbourhood areas were being developed in partnership with NHS neighbourhood models, enabling more co-located, community-based working;
- v) The programme's design centred on three tiers of prevention: primary, secondary and tertiary, ensuring universal access to support, targeted early intervention for those at heightened risk and comprehensive wrap-around support for those already in crisis;
- w) Work was focusing on making better use of community assets such as libraries, hubs and family centres to improve accessibility of help and embed support at the heart of local communities;
- x) The programme's financial model involved using capital receipts to pump-prime preventative work, with the aim of generating a sustainable cycle in which early-help investment reduced long-term costs and enabled further reinvestment;
- y) Detailed KPIs, theory of change methodologies and governance systems were in development to ensure measurable outcomes, financial transparency and accountability across services;
- z) A full governance framework was operational, involving strategic directors from the key service areas most affected by the programme.

In response to questions, the Board discussed:

- aa) Concerns about historic difficulties with multi-agency data-sharing, particularly with police and health partners, and the extent to which the Council could currently access the necessary data to deliver the Single Citizen View model. Clarification was provided that the first phase of the Single Citizen View focused on integrating Council-held data, and that legal and data-sharing issues would be navigated carefully before expanding to external partners, with appropriate governance and evidence of resident benefit required;

- bb) Recognition that the success of City Help & Support would rely on early, lawful and safe data-sharing, and acknowledgment that other agencies would ultimately benefit financially and operationally from reduced crisis demand;
- cc) Support for the programme's aims, noting numerous examples of residents being passed between multiple services or agencies when seeking help, often repeating their story many times and experiencing delayed support;
- dd) Clarification that any savings or cost avoidance generated through City Help & Support would remain within the programme to support further preventative work, rather than being diverted elsewhere;
- ee) Clarification that, while physical visibility had value in some contexts, residents with the most complex needs rarely accessed support through city-centre buildings. Instead, the programme focused on locating services within communities via hubs, libraries and trusted local assets to strengthen relationships, build trust and reduce 'pillar-to-post' experiences;
- ff) Acknowledgement that library sites were increasingly acting as first-stop contact points for residents and that the broader customer experience programme would address issues of accessibility, signage and improved first contact;
- gg) Recognition of the need to reduce the number of times a resident must tell their story, with members emphasising the importance of seamless referral routes, single points of contact and unified multi-agency responses;
- hh) Recognition that residents presenting in crisis often had multiple underlying issues, and the City Help & Support model was intended to help identify these earlier through data insights and stronger cross-team collaboration;
- ii) The relationship between demand management and the Council's medium-term financial planning, with the Section 151 Officer highlighting that the programme was not about making savings but about reducing the trajectory of demand growth, which was essential for the five-year MTFP;
- jj) Recognition that the programme required brave and strategic decisions to shift resources and avoid over-investment in reactive, high-cost crisis provision.

The Board agreed:

- I. To review and feedback on the City Help & Support programme.

### 33. **Finance Monitoring Report Month 6**

Ian Trisk-Grove (Service Director for Finance) introduced the Financial Monitoring Report, Month 6 and discussed:

- a) The Month 6 position showed an adverse full-year forecast of £8.754 million, representing a slight deterioration from Month 5, and approximately £1.9 million worse than the position at the same point in the previous financial year;
- b) Directorate-level pressures were detailed in the report, with adult social care continuing to experience increasing demand, including a step-change first noted at Month 4, and underlying increases in care home placements and domiciliary care costs contributing to a pressure of approximately £2.2 million;
- c) Community Connections (homelessness services) continued to face pressures due to the availability and speed of securing temporary accommodation, although demand was currently being managed within the directorate, with a reported pressure of approximately £0.9 million;
- d) Children's Services continued to experience significant pressures relating to placements, creating a Year-to-Date pressure of approximately £3.7 million, though active work within the directorate was being undertaken to manage each placement on a line-by-line basis to ensure the position was carefully controlled;
- e) Customer and Corporate Services held a pressure of approximately £1.3 million, arising from facilities management work required following building surveys, repairs and maintenance, and an overspend relating to the Directly Elected Mayor referendum of approximately £0.17 million;
- f) Savings delivery remained a strong focus, with £6.5 million achieved to date, £3.7 million in progress, and £2.2 million identified as unachievable, the majority of the latter relating to Energy-from-Waste assumptions;
- g) The capital programme now totalled £372.311 million, with approximately £17.5 million reprofiled out of the current year to future years within the five-year programme, reflecting normal in-year adjustments as project timelines became clearer;
- h) Early reprofiling of capital spend supported improved decision-making by enabling better forecasting of the revenue implications of the capital programme, particularly in relation to treasury management and borrowing requirements;
- i) The Month 6 report represented the Council's formal half-year position and highlighted the challenge facing the organisation during the remainder of the financial year.

In response to questions, the Board discussed:

- j) Concerns about the likelihood of achieving a balanced position by year-end, with clarification sought on the level of confidence officers held that the forecast overspend could be reduced to a manageable level. It was clarified

that significant work was underway across the Corporate Management Team, in partnership with Councillor Lowry and Cabinet, to identify in-year mitigations including tighter service-level budget management, engagement with staff on deferral of discretionary spend, and increased visibility on the most significant drivers of demand;

- k) Success of the City Help & Support programme would shape medium and long-term demand trajectories, but in-year efforts remained essential to address immediate financial risks;
- l) The role of treasury management, reprofiled capital expenditure and other financial levers in helping address the in-year position, though officers reiterated that confidence levels at Month 6 could not be quantified due to the number of variables remaining for the final quarter;
- m) Queries regarding the Community Equipment Service, specifically whether the ICB (Integrated Care Board) would agree to fund additional pressures within the pooled Better Care Fund budget. It was clarified that the Council maintained a strong working relationship with the ICB, and that the expectation was reasonable for the ICB to contribute to the circa £300,000 required to meet additional service costs, as the service was jointly funded through the Better Care Fund and had previously been subject to collaborative financial review.

The Board agreed:

- 1. To note the forecast revenue monitoring position at Month 6, including the adverse variance of £8.754 million, and the further risks highlighted during discussion;
- 2. To note that the overall Capital Budget for 2025–2030 had been revised to £372.311 million, as set out in Table 18 of the report, with reconciliation and detail of the movements in the quarter set out in Tables 18 and Table 21.

#### 34. **Budget Scrutiny Plan**

Ian Trisk-Grove (Service Director for Finance) introduced the Budget Scrutiny Plan and discussed:

- a) The paper set out the proposals for the 2026/27 Budget Scrutiny process;
- b) The proposal was informed by how budget scrutiny had operated successfully in previous years, with a balance between strategic oversight and sufficient depth for areas under the greatest financial pressure;
- c) The proposals recognised the importance of wider organisational transformation, including the use of AI and other enabling programmes, which were expected to support more robust budget management over the medium to long term;

- d) The paper enabled the Board to comment on the proposed format, schedule and focus areas for the Budget Scrutiny sessions planned for January.

In response to discussion, the Board discussed:

- e) Providing discretion to the Chair and Vice-Chair to adjust the timetable during Budget Scrutiny so that areas experiencing the greatest risk or overspend received proportionately more time, while areas of lesser concern received shorter scrutiny periods;
- f) Support from members for the proposed approach, ensuring scrutiny time was focused where it was most needed;
- g) Confirmation that provisional diary holds were in place for 21 and 22 January, subject to confirmation with members;
- h) The need for early publication of finalised dates to allow councillors to arrange annual leave or adjust commitments, noting challenges in previous years when papers had been issued close to the meeting dates;
- i) Requests for budget papers and supporting documents to be published in sufficient time for detailed review, emphasising the scale and complexity of the budget and the need to read appendices thoroughly before the January sessions;
- j) Confirmation that the public consultation had launched the previous day would run for six weeks and that the results would form part of the final budget pack available to Scrutiny;
- k) Reassurance that the consultation sought input from a broad range of residents, including service users, and that the Council was directing communication efforts to maximise reach so Scrutiny would have sight of the widest possible range of public feedback.

The Board agreed:

1. To support the proposed structure for the 2026/27 Budget Scrutiny process as outlined in the report;
2. To delegate authority to the Chair and Vice-Chair to adjust the timings allocated to individual scrutiny sessions, ensuring that areas of greatest financial pressure receive proportionately more time;
3. **Action:** To request early confirmation of the scrutiny dates and timely publication of all Budget Scrutiny papers to enable members to prepare fully.

### 35. **Corporate Plan Performance Report**

Councillor Penberthy (Cabinet Member for Housing, Cooperative Development and Communities) introduced the Corporate Plan Performance Report and discussed:

- a) The next full six-month Corporate Plan Performance Report was scheduled for Cabinet consideration in December 2025, and therefore a complete report was not yet available for Scrutiny;
- b) In place of a full report, the Scrutiny Management Board had been provided with a short update confirming that officers were in the process of preparing the six-month report for Cabinet.

In response to questions, the Board discussed:

- c) That the substantive performance report would be considered at the next meeting cycle once the Cabinet report had been published;
- d) Members looked forward to receiving the completed six-month performance report in December and to reviewing progress against the Corporate Plan at that time.

The Board agreed:

- I. To note the update provided.

### 36. **Risk Management Update, Q2, 2025-26**

Ian Trisk-Grove (Service Director for Finance) introduced the 2025/26 Quarter Two Risk Management Update and discussed:

- a) The purpose of the report was to provide visibility of the current Strategic Risk Register and to outline the reset undertaken during the summer to improve the clarity, language and usability of the strategic risks;
- b) The updated format aimed to make risks easier to interpret and would support the next phase of work to strengthen operational risk management across the organisation, ensuring strategic and operational risks aligned more effectively;
- c) Future quarterly reports to the Scrutiny Management Board would now show changes in risk scores, direction of travel, controls and mitigations, enabling members to track movements and understand how risks were being managed over time;
- d) The revised approach was intended to support better organisational understanding of risks, encourage improved ownership and provide clearer oversight for Scrutiny.

In response to questions, the Board discussed:

- a) Thanks for the improved presentation of the Strategic Risk Register, noting that the updated layout made the information significantly easier to read;

- e) Willingness to explore alternative formatting options, such as presenting the spreadsheet in portrait single-page extracts or another accessible format;
- f) Acknowledgement from the Board that the revised reporting framework would support clearer discussion and oversight in future meetings.

The Panel agreed:

- I. To note the 2025/26 Quarter Two Risk Management Update.

37. **Forward Plan of Key Decisions**

The Board agreed to note the Forward Plan of Key Decisions.

38. **Update from Committee Chairs and Work Programmes**

The Chair introduced the Scrutiny Management Board Work Programme and discussed:

- a) Work was ongoing to schedule the completion of the Select Committee Review on Cycling and Food Delivery in the City Centre, with efforts underway to coordinate availability of all contributors.

Councillor Murphy added:

- b) The Health and Adult Social Care Overview and Scrutiny Committee scheduled for 14 October 2025 had been deferred due to delays with an external report.

Councillor Ricketts added:

- c) The Natural Infrastructure and Growth Panel continued progression through its five thematic pillars;
- d) Recent scrutiny sessions had examined Inclusive Growth, including discussion of the city's new branding and differing member views regarding its visual identity and messaging;
- e) The Committee undertook pre-Cabinet scrutiny of the Plan for Nature and People, contributing to policy refinement;
- f) Members had attended an external visit to Tinside, which provided valuable insight into marine-related issues affecting the city.

Councillor Coker added:

- g) The Housing and Community Services Scrutiny Panel had received a report on Building Bridges to Opportunity, reviewed ongoing work on homelessness and the wider implications for communities and service capacity, and

undertaken scrutiny on City Centre Car Parking in the context of the city centre's regeneration and future land-use changes.

The SMB Chair reminded Panel Chair's that written update reports were required when they were unable to provide a verbal update.

39. **Work Programme**

The Board agreed to note the work programme.

40. **Action Log**

The Board agreed to note the progress of the Action Log.