10.30	1.	**Welcome, Apologies and Declarations of Interest** **Minutes and Matters Arising** *Lord David Blunkett, Chair, Sheffield City Partnership Board*
10.35	2.	**Partnership Update** *Laura White, Partnership Manager*
10.45	3.	**Sheffield Property Association Research and Report -an evaluation of the economic impact of post-COVID working practices on Sheffield City Centre.** *Patrick Coupar, Senior Consultant, Kada Research Limited* *Martin McKervey, Chair, Sheffield Property Association*
11.30	4.	**City Goals: Transition** *Angela Foulkes, Principal and Chief Executive, The Sheffield College*
12.00	5.	**Health and Wellbeing Strategy** *Susan Hird, Public Health Consultant, Sheffield City Council* *Helen Watson, Public Health Specialty Registrar, Sheffield City Council* *Dan Spicer, Policy and Improvement Officer, Sheffield City Council*
12.20	6.	**Any other business**
		Date and Time of next meeting: Friday 10 May 2024, 10.30 am – 12.30 pm, The Circle, Rockingham Street

Working from Home Impact Evaluation Headlines

SPA
March 2024

Our Work

Increased working from home is having an impact nationally and internationally.

Kada Research were commissioned by the SPA to look at trends/impacts, stakeholder insights and potential future trends

KADA

National Picture

- UK homeworkers up from 4.7m to 9.9 m.
- Substantial and some elements are permanent.
- £3 billion of spending has been lost in the largest centres. Centres, with large numbers of professionals, are most vulnerable.
- Sheffield has the joint fourth highest increase in remote working of any of England's core cities at 18.7%
- 13% of workers work solely from home (fallen from a peak of 16%) with 25% undertaking hybrid working (UK).
- 78% cite improved work/life balance
- 47% cite improved wellbeing
- 53% cite less distractions

KADA

National Picture

- By the end of 2023 UK daily office attendance was 35% (highest mid-week), up from 30% in late 2022.
- Tap in data shows that peak commuting travel in London is up to 80% of the pre-Pandemic level.
- 20% reduction in commuters brings a 7% decline in local service spending.

Employer's Response

- Most firms flexible 2/3 days working arrangements
- UK companies reducing office space by up to 9 nine million sq. ft. Up to 80% of businesses reappraising office make up.
- Employers concerned about WFH. Demands to return to the office f/t met with strong pushback.

Employer's Response

- Firms emphasising the benefits of office work concerns about business culture, skills, management structures, agglomeration, collaboration and, crucially, productivity.
- Increased concerns that younger staff are not learning from more experienced staff.
- Investing in office environment to encourage attendance. Attendance highest with younger staff, they have high expectations of amenities/services.
- Businesses do not believe that WFH will mean the end of the office, but offices must improve.

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Impacts

Sheffield Impact

	Two Days WFH	Three Days WFH
Number of Professionals working in the City Centre	54,425	54,425
Average days working from home	2	3
Decline in commuting	40%	60%
Pre Covid-Total City Centre Spend	£231.4m	£231.4m
Post-Covid Number of City Centre Workers	87,080	76,195
Loss of commuters/city centre workers	20%	30%
Loss in Spending	7%	14%
Total Loss Per Annum	**£16.2m**	**£32.4m**
Loss of Retail/Hospitality Jobs	469	938
GVA Loss	£11.58m	£23.15m

Doesn't include lost GVA/productivity

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Retail

- Decreased post Covid sales - up to 40% lost revenue.
- Businesses have reduced staffing and opening times accordingly. late afternoon/early evenings regarded as the quietest times.
- Lunchtime revenue was also down in several retailers with significantly lower office attendance (i.e. Moorfoot) at large employers having a large impact.
- Different patterns were identified but Mondays/Fridays are less busy with revenue down by a third. Potential recent increase in Friday sales

Retail

- Big City Centre events, such as football matches/Christmas markets, have a good impact upon footfall/ retailers want an ongoing calendar of big events.
- Some confident that if you get your offering right attracting a mixture of workers, commuters, residents, students, and visitors you can still maintain (and increase) healthy sales levels.
- Significant optimism expressed about Heart of the City with retailers welcoming investment and ongoing announcements. Spike in some sales since the opening of Pound's Park.

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Commercial Office Market

- Many offices remain open with reduced staff in the office.
- Many businesses are still 'holding over' as they still do not understand their medium/long term own occupation requirements
- But there is a clear pattern of flight to smaller but quality spaces.
- Feedback is that staff won't commit to set days in/out which doesn't allow managers to plan ahead for their building strategy.
- Businesses see opportunities for either cost saving or betterment by reducing footprint of office or increasing quality, but are in fear of taking too much/too little space to meet future needs.

Year	CITY CENTRE TAKE UP (Sq Ft)
2017	246,306
2018	272,159
2019	295,021
2020	80,989
2021	152,932
2022	132,887
2023 YTD	75,595

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Sheffield Impact

- The Cathedral and Kelham area in the City Centre has seen a £8.7m loss in spending.
- Public transport usage rates have suffered with a decline in commuting rates with bus, tram and rail usage within Sheffield all dropping.
- All UK cities have seen increase shop vacancy rates. 8% in Newcastle and Oxford through to 2% in Sheffield and Edinburgh. Sheffield's vacancy rate remains the joint fourth highest at 18%.

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Positives

BUT

- 37,500 Sheffield residents don't work within Sheffield. With increased WTF more of their spend stays in the city
- Sheffield had the strongest house price growth of any UK city during 2022 (18.9%/ national - 9.2%). Benefitted from remote work
- Spend displacement has benefitted some Sheffield suburbs. Walkley has seen the fifth-biggest UK boost in local spending (16.7%). But some of this is displacement with Sheffield.
- City Centre footfall is on the increase. The most recent BID data was 3.7% higher than this time last year.
- Increased Saturday footfall driven by f&b/leisure.

Social Creatures

"Humans have always gathered around shared spaces and the workspace is no different. Technical tools such as Slack/Teams can't replicate this, and they get waring."

"People want to live and work in a city centre that has green space that has F&B that has entertainment and has culture."

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City Centre Living

- Impact could be increasingly mitigated by increased City Centre living (an extra 20,000 homes planned). Last week's announcement shows that Sheffield is taken significant steps to drive this.
- National trend towards residential, office spaces being converted but can be expensive/ longer-term.
- Targets welcomed, particularly if they ensure a focus upon non-students and affordable housing.
- Good early indications with some non-student development sold but viability is still precarious. Stakeholders want continued investment in the public sphere and leisure offering.
- Very positive about the Heart of the City and wider improvements to the city centre's greenspace.
- Stakeholders would welcome continued focus on attracting and retaining young talent. The discerning 24-35-year-old graduate market is very important.

Moving Forward

24-35 Post graduate market

Stakeholders emphasised their importance.

- Increase demand for City Centre properties
- Lifting disposable income levels. Providing high value jobs.
- Driving leisure/retail footfall.
- Helping to fill high value skills gaps and to increase the city's relatively low levels of productivity.
- Businesses will invest in high quality offices to attract/retain them, but this must be supported by an excellent City Centre offering with ongoing public sphere, housing and leisure offering
- Very discerning about lifestyle choices and Sheffield is competing in a ruthless market
- News about the investment in Furnace Hill and Neepsend very welcome. Particularly with an emphasis upon affordable housing.

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A Mixed Use Centre

Sheffield City Centre is evolving at a rapid pace. This was welcomed and there is a growing sense that Sheffield is very well placed to benefit from the repurposing of city centres for a hybrid working future.

Stakeholders welcomed the pipeline of developments and it is clear that areas of the centre have been totally transformed but significant gaps remain.

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Stakeholders are still very committed to the City Centre. They want to see a continued range of supportive policies and strategies supporting City Centre working, living and spending.

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Key Themes

- Increasing resistance against WFH from employers
- Employee demand for WFH is strong workers want 2.25 days WFH.
- Trends could increase inequalities, with jobs and GVA losses disproportionately affecting lower skilled workers.
- Reduced taxation revenue significant impact upon public finances /vital public services. Loss of public services and city centre service jobs will increase inequality .

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Key Themes

- Many major employers within large central sites have been under 25% occupancy. Centres internationally are experiencing reduced weekday footfall and significant service demand.
- Employers have a significant role to play in supporting city centre economies. Businesses should continue to adopt a package of 'pull factors'
- Need for continued emphasis upon experiential retail and high standard leisure/f&b – young professionals have high standards.

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Recommendations

Employers

I. Ongoing investment in the office environment. Redesigning offices around increased connection and collaboration.

II. Invest in the wider office offering

III. Flexible office hours and mandate some staff attendance to support staff development

IV. Schedule regular in-person collaborative team days

V. Choose office locations that provide the best access to services, amenities, and public transport. Then build a calendar of centrally located social events and secure staff discounts

SCC, SYMCA & Strategic Partners (Marketing)

I. Targeted ongoing and assertive marketing focused on 24–35 year-olds. Continued focus upon the liveability, employment opportunities and affordable housing relative to other popular cities.

II. Continued investment in the City Centre physical and business environment. Attract high-skilled/high-wage businesses (i.e. Persophonica)

III. Continue to develop/emphasise a shared sense of message and purpose for all external marketing. Consistent use of the Sheffield is Super/Outdoor City brands but with a particular focus upon the 'City' element. Rival Manchester's worker bee.

SCC, SYMCA & Strategic Partners (Marketing)

IV. All retailers emphasised the importance of an ongoing calendar of high-quality, world-class events that emphasise and reinforce Sheffield's strengths and heritage

V. Amplify Sheffield's independent and distinct voice. This is a defining feature of Sheffield's wider offering, and it provides the city with a clear USP that has traction with key demographics.

SCC, SYMCA & Strategic Partners (Liveability)

I. Continue to support investment into the public realm, heritage buildings and shared public spaces. They require excellent ongoing maintenance, curation, and protection (Bloomberg NY example)

II. Ensure that City Centre planning continues to focus upon mixed use facilities, green space, liveability, good employment, and affordable housing.

"The pillars upon which a more vibrant economy can be built"

III. Support the nighttime economy with post work spend incentives (i.e. a Sheffield commuter app and early evening event schedule)

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SCC, SYMCA & Strategic Partners (Liveability)

IV. Continued support for the £2 bus fare to incentivise public transport use/travel.

V. Retailers require support to deal with the negative impact of anti-social behaviour.

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Concluding Points

I. WFH has a had a significant and semi-permanent impact.

II. Centres must evolve accordingly.

III. Key employers and stakeholders have key roles and responsibilities for ensuring the vitality of their city centres.

IV. Attracting and retaining large numbers of 25-35 year-olds is a crucial element for driving up office attendance and supporting a vibrant centre.

Concluding Points

I. Sheffield must have a consistent and clear urban USP.

II. Centres that have embraced a mixed-use liveable offering are best place not just to mitigate the impact but thrive.

III. Sheffield has made large strides forward in doing this but ongoing work needs to be done to fill significant gaps.

IV. There is a coalition of the willing who are very keen to support and drive this process.

Close

Thank you for listening we would welcome any questions

City Goals: what does and should support and commitment from city organisations look like?

We need institutions and organisations to be part of making the Goals a reality for Sheffield over the next ten years. There are lots of approaches people in Sheffield might take to that in the short, medium and long term, depending on what feels right to them and what aligns to their interests, roles and activities. Over the coming weeks and months, as we transition to a new way of working to deliver the City Goals together, we are looking at how organisations might show their commitment to the Goals in the following ways:

Endorsing the Goals through any formal processes where applicable (Boards, Committees, Leadership Teams and Forums etc if you have them) or in whatever ways make sense for you to demonstrate your commitment

Making the goals visible in how you do business – for example, in your new strategies, plans and priorities and working out how you can align your existing strategies and approaches with the Goals

Identifying and sharing the things you are doing that contribute to the Goals – this could be projects, activities, values and behaviours

Promoting and championing the Goals – proudly talking about your role as ambassadors and providing us (the City Goals Transition Team) with information, quotes, logos etc which we can use to evidence how you are owning, living and supporting the Goals

Being an active part of a collective approach – contributing to and supporting this work to succeed by giving your time, energy, resources to support shared endeavour and activity.

Any other ideas you have for how you could fufil your commitment to furthering the Goals?

Sheffield Joint Local Health and Wellbeing Strategy

Update to SCPB 8 March 2024

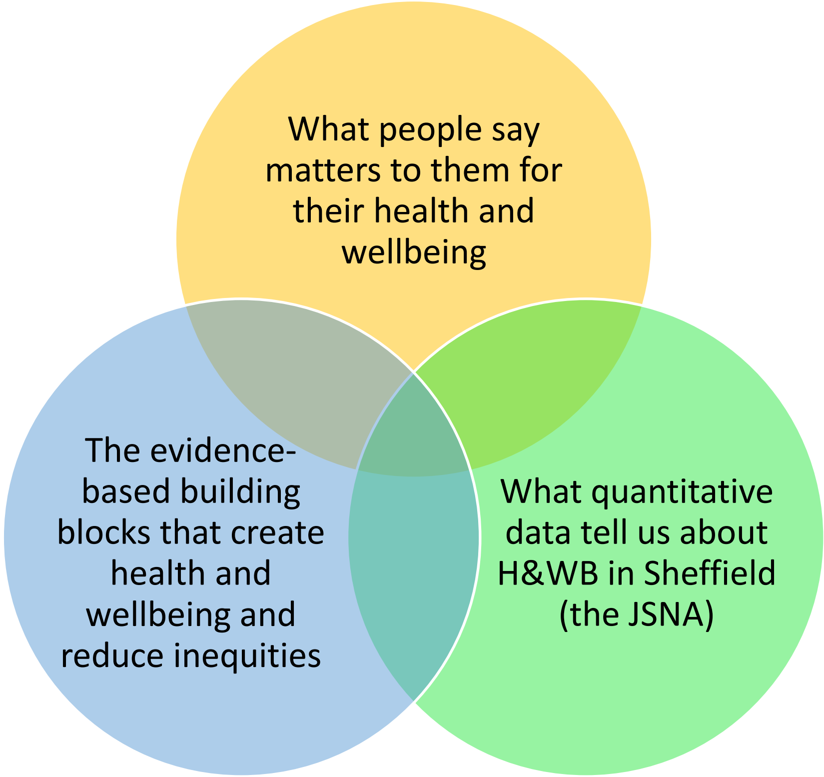
Background to H&WB Board and Strategy

Cllr Angela Argenzio

Dr Zak McMurray

Current H&WB Strategy 2019-2024

Creating health and wellbeing



What people say matters for their health and wellbeing

What quantitative data tell us about H&WB in Sheffield (the JSNA): focus on healthy life expectancy

The evidence-base for creating health and wellbeing

8. Pursue environmental sustainability and health equity together

4. Create fair employment and good work for all

5. Ensure healthy standard of living for all

6. Create and develop healthy and sustainable places and communities

7. Strengthen the role and impact of ill health prevention

2. Give every child the best start in life

3. Enable all children, young people and adults to maximise their capabilities and have control over their lives

1. Tackle racism, discrimination and their outcomes

Four big shifts

Leadership and workforce

Brave leadership, and a workforce that has the resources and capability to take action

Partnerships and collaboration

Strong partnerships and effective collaboration across sectors and organisations and with communities

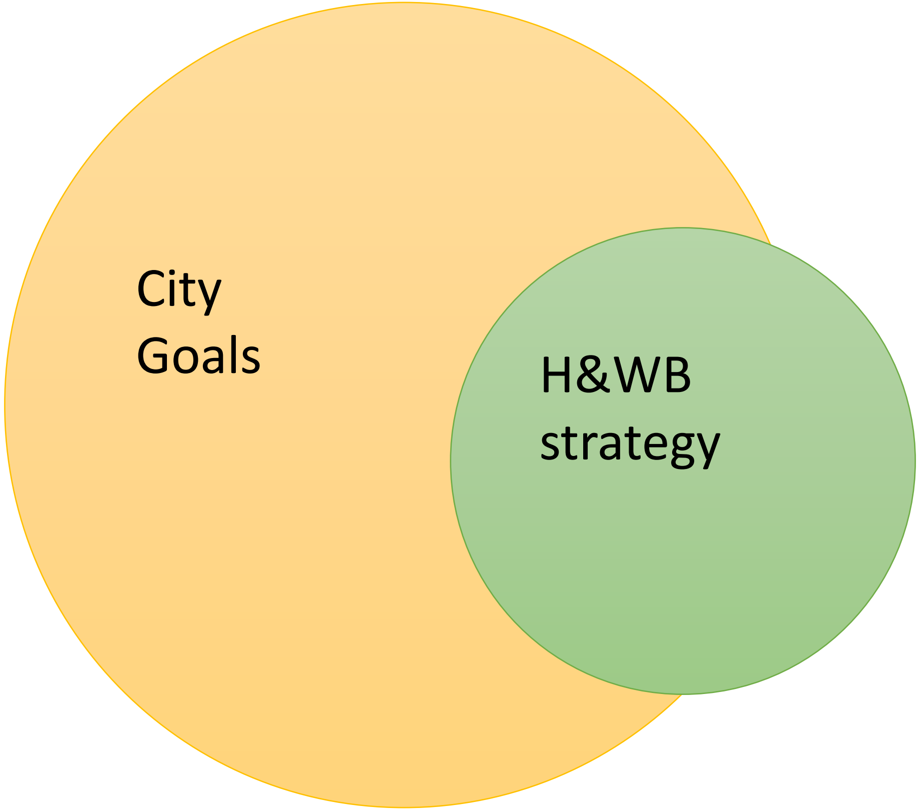
Resources

Greater and more equitable investment in the social determinants of health and prevention

Monitoring and accountability

Shared data and insight to measure and report what matters, culture of openness and honesty, and structures for holding each other to account

Synergy with City Goals



- What vs how
- 4 big shifts are critical
- Synergy with City Goals ambitions to do things differently

Timescales

16 January 2024	H&WB Board private workshop
30 January 2024	H&WB Board public workshop
28 March 2024	Outline strategy agreed by H&WBB
April/May	Refinement and further discussion
June/July 2024	**Final strategy ready**

Appendix: Who sits on the H&WB Board

Place	Name	Place	Name
Chair of SCC Adult Health & Social Care Policy Committee*	Cllr Angela Argenzio (Co-Chair)	**Chair of SCC Education, Children & Families Policy Committee**	Cllr Dawn Dale
Chair of SCC Housing Policy Committee	Cllr Douglas Johnson	**SCC Chief Executive**	Kate Josephs
SCC Director of Adult Social Services	Alexis Chappell	**SCC Director of Children's Services**	Meredith Teasdale
SCC Executive Director, City Futures	Kate Martin	**SCC Director of Public Health**	Greg Fell
NHS South Yorkshire Executive Director for Sheffield	Emma Latimer	**NHS Sheffield Director with responsibility for strategic leadership**	[vacant]
NHS Sheffield Director with responsibility for clinical leadership	Dr Zak McMurray (Co-Chair)	**Nominated representative of the Health and Care Partnership**	Kathryn Robertshaw
Nominated representative of NHS Acute Provider Trusts	Dr David Black	**Nominated clinical representative of Primary Care Networks**	Dr Leigh Sorsbie
Nominated representative of partners working with or for children and young people	Yvonne Millard (SCH)	**Nominated representative of partners working to support mental health and wellbeing**	Rachel Siviter
Representative from a VCF organisation working citywide	Helen Sims (VAS)	**Representative from a VCF organisation working within a locality**	Megan Ohri (SOAR)
Representative from a VCF organisation working with a specific group	[vacant]	**Representative of South Yorkshire Police**	Chief Superintendent Lindsey Butterfield
Chair of Healthwatch Sheffield	Judy Robinson	**Representative of University of Sheffield**	Rob Sykes