

Public Document Pack

Lewisham Council Members

Members of the committee, listed below, are summoned to attend the meeting to be held on Wednesday, 18 July 2018.



Ian Thomas, Chief Executive
July 10 2018

Mayor Damien Egan	
Councillor Obajimi Adefiranye	
Councillor Abdeslam Amrani	
Councillor Tauseef Anwar	
Councillor Chris Barnham	
Councillor Paul Bell	
Councillor Peter Bernards	
Councillor Chris Best	
Councillor Kevin Bonavia	
Councillor Andre Bourne	
Councillor Bill Brown	
Councillor Juliet Campbell	
Councillor Suzannah Clarke	
Councillor Patrick Codd	

Councillor Tom Copley
Councillor Liam Curran
Councillor Janet Daby
Councillor Brenda Dacres
Councillor Sophie Davis
Councillor Amanda De Ryk
Councillor Joe Dromey
Councillor Colin Elliott
Councillor Alex Feis-Bryce
Councillor Aisling Gallagher
Councillor Leo Gibbons
Councillor Alan Hall
Councillor Carl Handley
Councillor Octavia Holland
Councillor Sue Hordijkenko
Councillor Coral Howard
Councillor Mark Ingleby
Councillor Liz Johnston-Franklin
Councillor Caroline Kalu
Councillor Silvana Kelleher
Councillor Louise Krupski
Councillor Jim Mallory
Councillor Paul Maslin
Councillor Sophie McGeevor
Councillor Joan Millbank
Councillor Hilary Moore
Councillor Pauline Morrison
Councillor John Muldoon

Councillor Olurotimi Ogunbadewa

Councillor Jacq Paschoud

Councillor John Paschoud

Councillor Stephen Penfold

Councillor James Rathbone

Councillor Joani Reid

Councillor Sakina Sheikh

Councillor Jonathan Slater

Councillor Alan Smith

Councillor Luke Sorba

Councillor Eva Stamirowski

Councillor James-J Walsh

Councillor Susan Wise

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The Council cannot guarantee that anyone present at a meeting will not be filmed or recorded by anyone who may then use your image or sound recording.

If you are intending to audio record or film this meeting, you must :

- tell the clerk to the meeting before the meeting starts
- only focus cameras/recordings on councillors, Council officers, and those members of the public who are participating in the conduct of the meeting and avoid other areas of the room, particularly where non-participating members of the public may be sitting.
- ensure that you never leave your recording equipment unattended in the meeting room.

If recording causes a disturbance or undermines the proper conduct of the meeting, then the Chair of the meeting may decide to stop the recording. In such circumstances, the decision of the Chair shall be final.

Council Agenda

Wednesday, 18 July 2018
7.30 pm, Council Chamber - Civic Suite
Civic Suite
Lewisham Town Hall
London SE6 4RU

For more information contact: Kevin Flaherty 0208 3149327

Part 1

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Members of the public are welcome to attend committee meetings. However, occasionally, committees may have to consider some business in private. Copies of agendas, minutes and reports are available on request in Braille, in large print, on audio tape, on computer disk or in other languages.

Agenda Item 1

COUNCIL		
Report Title	Declarations of Interests	
Key Decision		Item No. 1
Ward		
Contributors	Chief Executive	
Class	Part 1	Date: July 18 2018

Declaration of interests

Members are asked to declare any personal interest they have in any item on the agenda.

1 Personal interests

There are three types of personal interest referred to in the Council's Member Code of Conduct :-

- (1) Disclosable pecuniary interests
- (2) Other registerable interests
- (3) Non-registerable interests

2 Disclosable pecuniary interests are defined by regulation as:-

- (a) Employment, trade, profession or vocation of a relevant person* for profit or gain
- (b) Sponsorship –payment or provision of any other financial benefit (other than by the Council) within the 12 months prior to giving notice for inclusion in the register in respect of expenses incurred by you in carrying out duties as a member or towards your election expenses (including payment or financial benefit from a Trade Union).
- (c) Undischarged contracts between a relevant person* (or a firm in which they are a partner or a body corporate in which they are a director, or in the securities of which they have a beneficial interest) and the Council for goods, services or works.
- (d) Beneficial interests in land in the borough.
- (e) Licence to occupy land in the borough for one month or more.
- (f) Corporate tenancies – any tenancy, where to the member's knowledge, the Council is landlord and the tenant is a firm in which the relevant person* is a partner, a body corporate in which they are a director, or in the securities of which they have a beneficial interest.
- (g) Beneficial interest in securities of a body where:-

- (a) that body to the member's knowledge has a place of business or land in the borough; and
- (b) either
 - (i) the total nominal value of the securities exceeds £25,000 or 1/100 of the total issued share capital of that body; or
 - (ii) if the share capital of that body is of more than one class, the total nominal value of the shares of any one class in which the relevant person* has a beneficial interest exceeds 1/100 of the total issued share capital of that class.

*A relevant person is the member, their spouse or civil partner, or a person with whom they live as spouse or civil partner.

(3) Other registerable interests

The Lewisham Member Code of Conduct requires members also to register the following interests:-

- (a) Membership or position of control or management in a body to which you were appointed or nominated by the Council
- (b) Any body exercising functions of a public nature or directed to charitable purposes, or whose principal purposes include the influence of public opinion or policy, including any political party
- (c) Any person from whom you have received a gift or hospitality with an estimated value of at least £25

(4) Non registerable interests

Occasions may arise when a matter under consideration would or would be likely to affect the wellbeing of a member, their family, friend or close associate more than it would affect the wellbeing of those in the local area generally, but which is not required to be registered in the Register of Members' Interests (for example a matter concerning the closure of a school at which a Member's child attends).

(5) Declaration and Impact of interest on members' participation

- (a) Where a member has any registerable interest in a matter and they are present at a meeting at which that matter is to be discussed, they must declare the nature of the interest at the earliest opportunity and in any event before the matter is considered. The declaration will be recorded in the minutes of the meeting. If the matter is a disclosable pecuniary interest the member must take no part in consideration of the matter and withdraw from the room before it is considered. They must not seek improperly to influence the decision in any way. **Failure to declare such an interest which has not already been entered in the Register of Members' Interests, or participation where such an interest exists, is liable to prosecution and on conviction carries a fine**

of up to £5000

- (b) Where a member has a registerable interest which falls short of a disclosable pecuniary interest they must still declare the nature of the interest to the meeting at the earliest opportunity and in any event before the matter is considered, but they may stay in the room, participate in consideration of the matter and vote on it unless paragraph (c) below applies.
- (c) Where a member has a registerable interest which falls short of a disclosable pecuniary interest, the member must consider whether a reasonable member of the public in possession of the facts would think that their interest is so significant that it would be likely to impair the member's judgement of the public interest. If so, the member must withdraw and take no part in consideration of the matter nor seek to influence the outcome improperly.
- (d) If a non-registerable interest arises which affects the wellbeing of a member, their, family, friend or close associate more than it would affect those in the local area generally, then the provisions relating to the declarations of interest and withdrawal apply as if it were a registerable interest.
- (e) Decisions relating to declarations of interests are for the member's personal judgement, though in cases of doubt they may wish to seek the advice of the Monitoring Officer.

(6) Sensitive information

There are special provisions relating to sensitive interests. These are interests the disclosure of which would be likely to expose the member to risk of violence or intimidation where the Monitoring Officer has agreed that such interest need not be registered. Members with such an interest are referred to the Code and advised to seek advice from the Monitoring Officer in advance.

(7) Exempt categories

There are exemptions to these provisions allowing members to participate in decisions notwithstanding interests that would otherwise prevent them doing so. These include:-

- (a) Housing – holding a tenancy or lease with the Council unless the matter relates to your particular tenancy or lease; (subject to arrears exception)
- (b) School meals, school transport and travelling expenses; if you are a parent or guardian of a child in full time education, or a school governor unless the matter relates particularly to the school your child attends or of which you are a governor;
- (c) Statutory sick pay; if you are in receipt
- (d) Allowances, payment or indemnity for members
- (e) Ceremonial honours for members
- (f) Setting Council Tax or precept (subject to arrears exception)

Agenda Item 2

COUNCIL		
Report Title	Minutes	
Key Decision		Item No.2
Ward		
Contributors	Chief Executive	
Class	Part 1	Date: July 18 2018

Recommendation

It is recommended that the minutes of the meetings of the Council which was open to the press and public, held on May 23 2018 be confirmed and signed (copy previously circulated).

Agenda Item 3

COUNCIL		
Report Title	Petitions	
Key Decision	no	Item No.
Ward	n/a	
Contributors	Chief Executive (Head of Business & Committee)	
Class	Part 1	Date: July 18 2018

1. The Council is invited to receive petitions (if any) from members of the Council or the public. There is no requirement for Councillors to give prior notice of any petitions that might be presented.
2. The Council welcomes petitions from the public and recognises that petitions are one way in which people can let us know their concerns. All petitions sent or presented to the Council will receive an acknowledgement from the Council within 14 days of receipt. This acknowledgement will set out what we plan to do with the petition.
3. Paper petitions can be sent to :-

Governance Support, Town Hall, Catford, SE6 4RU

Or be created, signed and submitted on line by following this link

<https://councilmeetings.lewisham.gov.uk/ielogon.aspx?lp=1&RPID=43808439&HPID=43808439&Forms=1>
4. Petitions can also be presented to a meeting of the Council. Anyone who would like to present a petition at a Council meeting, or would like a Councillor to present it on their behalf, should contact the Governance Support Unit on 0208 3149327 at least 5 working days before the meeting.
5. Public petitions that meet the conditions described in the Council's published petitions scheme and which have been notified in advance, will be accepted and may be presented from the public gallery at the meeting.
6. Petitions for the Council have been notified by the following:

Councillor John Paschoud on behalf of local residents regarding the Perry Vale crossing.

Agenda Item 4

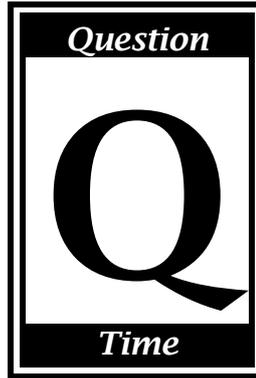
COUNCIL		
Report Title	Public Questions	
Key Decision		Item No.
Ward		
Contributors	Chief Executive (Head of Business & Committee)	
Class	Part 1	Date: July 18 2018

The Council has received questions from members of the public in the order shown in the table below. Written responses will be provided to the questioners prior to the Council meeting and they will be entitled to attend and ask a supplementary question should they wish to.

Question **Questioner**

1.	Nancy Taylor
2.	Carole Hope
3.	Elizabeth Moucher
4.	Michael Dropf
5.	Mat Xerri
6.	David Da Silva Pereira
7.	Mrs Richardson
8.	Mr Williams
9.	Mr Morris
10.	Mr Maines
11.	Andrea Carey-Fuller
12.	Rosalind Huish
13.	Ms Utley
14.	Mr Rochell
15.	Andy Tonge
16.	Anthony Crowther
17.	Ms Phipps
18.	Trina Lynskey
19.	Mr Richardson
20.	Loredana Minini
21.	Carole Hope
22.	David Da Silva Pereira
23.	Mrs Richardson
24.	Mr Williams
25.	Mr Morris
26.	Andrea Carey-Fuller
27.	Rosalind Huish
28.	Andy Tonge
29.	Anthony Crowther

30.	Ms Phipps
31.	Mr Richardson
32.	Loredana Minini
33.	Trina Lynskey
34.	Carole Hope
35.	David Da Silva Pereira
36.	Mrs Richardson
37.	Mr Williams
38.	Rosalind Huish
39.	Andy Tonge
40.	Mr Richardson
41.	Carole Hope
42.	David Da Silva Pereira
43.	Mrs Richardson
44.	Mr Williams
45.	Rosalind Huish
46.	Andy Tonge
47.	David Da Silva Pereira
48.	Rosalind Huish
49.	David Da Silva Pereira
50.	Rosalind Huish



PUBLIC QUESTION NO 1.

Priority 1

LONDON BOROUGH OF LEWISHAM

COUNCIL MEETING

18 JULY 2018

Question asked by: Nancy Taylor

Member to reply: Councillor McGeevor

Question

Given that Paragraph 5.1 of Land Use Consultants' ecology report for Beckenham Place Park says:-

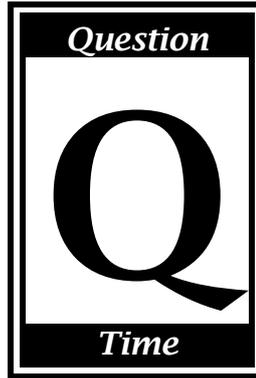
"5.1 The site is a Local Nature Reserve (LNR) and a Site of Metropolitan Importance for Nature Conservation (SINC). The designations describe the site as:

'One of the best wildlife sites in the Borough with a variety of high quality habitats. These include the most extensive ancient woodland in Lewisham, the most diverse acid grassland, the most natural stretch of river, probably the oldest pond and the only willow carr. Some of the parkland trees are very old and pre-date the landscaping of the park. The high diversity of plants and animals include numerous locally rare species and several nationally rare invertebrates have been recorded'."

Would the council explain why they authorised an Mountain Bike (MTB) trail to pass through part of previously untouched ancient woodland during the December 2017 and January 2018 Beastway events?

Reply

The woodlands of Beckenham Place Park are extensive and a number of trails already pass through them. When we were approached by an event organiser seeking consent for a series of three morning race sessions the Council's ecological officers inspected and advised on the proposed routes, which mostly used existing walking routes through the woodland or the open grasslands. The authorised routes avoided the most ecologically sensitive areas of woodland and were timed to take place in the winter outside of nesting season and when flora was dormant. The Council is keen to promote sensitive use of the largest park in south east London which has until recently had exceptionally low levels of use. Through effective pre-planning and post events analysis we are gradually building up use of the space in an ecologically sensitive way.



PUBLIC QUESTION NO 2.

Priority 1

LONDON BOROUGH OF LEWISHAM

COUNCIL MEETING

18 JULY 2018

Question asked by: Carole Hope

Member to reply: Councillors McGeevor

Question

With regard to tree felling in Beckenham Place Park, and in view of the information publicly disseminated by the Council i.e. that much of the timber cut will be used in the park, and that “most of this wood will be processed and stored off-site to be brought back for future use” please advise:-

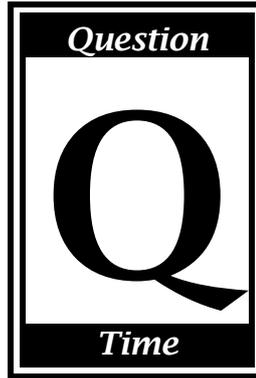
- What records have been kept of this timber and by whom?
- What facility is being used to store it?
- How much timber, actual and percentage, is being stored to be brought back for future use?

Reply

The contract for tree works in Beckenham Place Park specifies the material required for re-use in the park, this comprises:

49 logs of varying diameters over 5 metres in length
149 logs of varying diameters under 5 metres in length
600 cubic metres of processed wood arisings, principally woodchip for mulching and play areas.

Whilst it was expected that much of this wood would be stored off site at the contractor's yard and brought back for re-use, this has not proved necessary and only 15m³ has been removed from site to be returned when required. The remaining material is stockpiled at different locations within the park.



PUBLIC QUESTION NO 3.

Priority 1

LONDON BOROUGH OF LEWISHAM

COUNCIL MEETING

18 JULY 2018

Question asked by: Elizabeth Mouncher

Member to reply: Councillors McGeevor

Question

Please would the Council advise what initiatives it has taken to introduce MTB (Mountain Bike) and other cycle events into Beckenham Place Park. Specifically, which groups and organisations have you consulted about developing future events and which groups and organisations have already used the park for such events.

Reply

The council helped organise a family cycle event on 26th May which was about promoting exploration of the park by bike and showing people the best quiet routes to travel to the park by bike.

Through our consultation events the Council have discussed and tested appetite for cycling activities with several organisations over the years including:

British Cycling
Access Sport
Big Foot CC
Beastway
Pedal it

Green Chain Network

Lewisham Cyclists

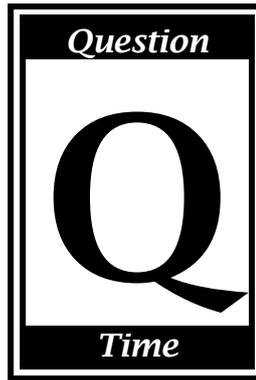
London Recumbents

Wide Horizons

Wheels for Wellbeing

30 local schools who responded to our survey about current and future use of the park.

To date, the first five organisations have been involved in cycling events and activities within the park. The activities include family group rides, mountain bike and BMX coaching for children and young people and competitive cyclocross and mountain bike races for all age groups.



PUBLIC QUESTION NO 4.

Priority 1

LONDON BOROUGH OF LEWISHAM

COUNCIL MEETING

18 JULY 2018

Question asked by: Michael Dropf

Member to reply: Councillors McGeevor

Question

How can Lewisham justify collecting garden waste every week, (which is inert, clean, does not smell, can be left for months without any issue) while collecting domestic waste (stinking, unhygienic, vermin-friendly) only once a fortnight?

If garden waste collection "pays for itself", then why isn't collection reduced to monthly and the extra money used to cross-subsidise weekly collection of actual waste?

How many Lewisham households actually create a bin full of garden waste every week? Does anybody in Lewisham actually have a garden that big?

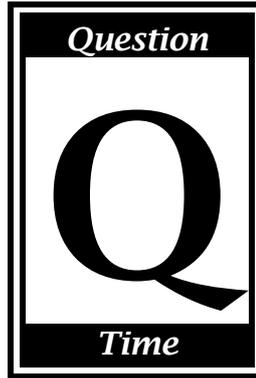
Reply

With a fortnightly collection on residual waste bins, and a weekly collection on recycling and food waste bins, it is hoped that the need for residual waste is minimal due to residents recycling as much of their waste as possible. By utilising the food and recycling waste bins, the need for a residual bin should naturally decrease. The garden waste scheme is a subscribed service run by Lewisham Council. Residents, through subscribing and agreeing to Terms and Conditions, are entitled to a weekly

collection. The service strives to achieve value for money, and the service quality is increasing. The garden waste scheme is a separate service from the residual, recycling, and food waste collections.

The garden waste service is a discretionary and not a statutory service we have to provide so is run separately to the residual and recycling collection service. Residents are charged £60 for a year's subscription for which as part of this scheme, they are entitled to a weekly collection of their garden waste.

Unfortunately, the actual tonnage for garden waste (alone) cannot be provided. However, there are approximately 10,000 households currently subscribed to the service, and with each collection, there is always waste collected. Of course during the warmer months, there is an increase in use of the service and it's naturally quieter in the colder months, but as a service, it's designed to be affordable and spread out across a year.



PUBLIC QUESTION NO 5.

Priority 1

LONDON BOROUGH OF LEWISHAM

COUNCIL MEETING

18 JULY 2018

Question asked by: Mat Xerri

Member to reply: Councillor Bell

Question

After doing some research, it seems that Milford Towers is the only building in the surrounding area not to have access to Fibre Broadband. This building was erected in the 1970s and therefore relies on old copper wiring which means residents rent dated and fail-prone communication services. I have checked on two neighbouring streets and they have access to high speed fibre broadband, Milford Towers does not. I am not sure whether this was intentional or whether there is a reason for it, but the fact remains that this building is occupied at full capacity and it seems likely to do so for some time.

So when will Milford Towers be able to join the rest of the borough in modern fibre broadband services?

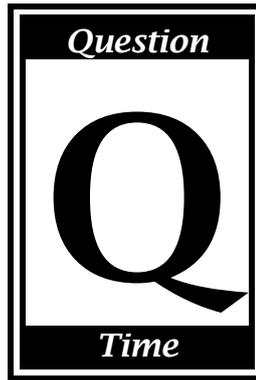
Reply

After an investigation it would suggest that the building, Milford Towers does not lend itself practically to the installation of fibre optic cabling, given the number of floors and the complexity of the flat layouts.

In order to provide residents with fibre optic broadband the broadband provider would firstly need to run a cable from the roadway into the block itself and then find a suitable access path for it to be routed through to the individual dwelling.

We expect providers would choose not to undertake this work for the reasons stated above as it would prove a lengthy and complex task.

We will continue to investigate the reasons why fibre optic installation is currently not possible in Milford Towers and will report back on this issue and any plans or likelihood of it being possible to do so in the future.



PUBLIC QUESTION NO 6.

Priority 1

LONDON BOROUGH OF LEWISHAM

COUNCIL MEETING

18 JULY 2018

Question asked by: David Da Silva Pereira

Member to reply: Councillor Bell

Question

Please could Council provide a breakdown what Estate services it provides on the Silwood Estate?

Reply

Services on the Silwood Estate are delivered by a combination of different agencies.

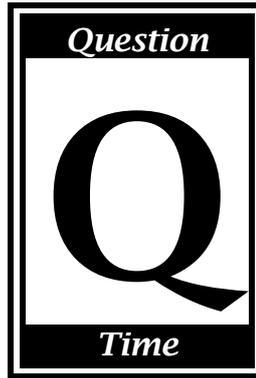
L&Q provide the following Estate Services:

- Grounds Maintenance
- Play Equipment Maintenance/Servicing
- Communal Refuse Bin Hire
- Bulk Refuse Collection
- Communal Pest Control
- Buildings Insurance (not for blocks which have exercised the right to manage)
- Service Charge Audit Fees

- L&Q Admin Fee (Homeowners)

Notting Hill Genesis have units in the Silwood Street development, also known as Blueprint. This site is run by a Residents Management Committee (RMC), who have appointed an agent, Haus Block Management. All estate and block services for this site are provided by HAUS, who also set service charges, on behalf of the Silwood Street RMC.

Lewisham Council provide street cleaning, street lighting, refuse collection and fly tip removal services.



PUBLIC QUESTION NO 7.

Priority 1

LONDON BOROUGH OF LEWISHAM

COUNCIL MEETING

18 JULY 2018

Question asked by: Mrs Richardson

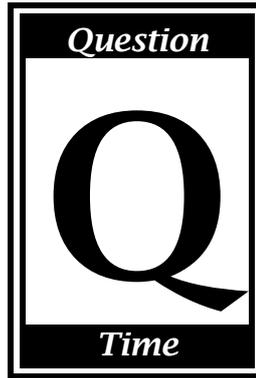
Member to reply: Councillor Slater

Question

Do any Lewisham council staff, including Lewisham Library staff, work as volunteers in Lewisham's Library Service at the Community Libraries? If so, how many, and at which community libraries?

Reply

One member of staff who is employed by the council as an apprentice within the library service also volunteers in one of the community libraries.



PUBLIC QUESTION NO 8.

Priority 1

LONDON BOROUGH OF LEWISHAM

COUNCIL MEETING

18 JULY 2018

Question asked by: Mr Williams

Member to reply: Councillor Bonavia

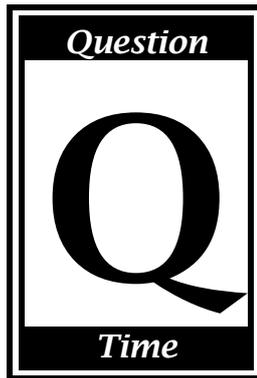
Question

The Mayor pledged during his campaign to carry out a review of Lewisham democracy. What is the timetable for this review and, given that Labour won 100% of the council seats with 60% of the vote, will he reach out to other local parties who stood in the May 2018 election to ensure that the votes of the 40% who didn't support his party are also represented within the review?

Reply

The proposals for conducting a local democracy review appear on the Council's agenda on 18th July. The proposals include an indicative timetable that assumes evidence gathering taking place up until the end of 2018 with recommendations to full Council to be made as early as possible in 2019.

In terms of reaching out, anyone wishing to make representations in the course of the review will be able to do so. In addition, the review will seek to find effective ways of reaching people who, for all kinds of reasons, rarely take part in our local democracy, whether at elections or in the many local decisions that may affect their lives.



PUBLIC QUESTION NO 9.

Priority 1

LONDON BOROUGH OF LEWISHAM

COUNCIL MEETING

18 JULY 2018

Question asked by: Mr Morris

Member to reply: The Mayor

Question

In answer to public Question Number 4 on 22 November 2017 about the proposed footbridge over Doggett Road, the then Deputy Mayor stated "Barratt's recently revised the bridge estimate which has increased and this needs to be agreed with the Council. Once these issues have been resolved we will be in a position to provide an update on the bridge installation programme." In a supplementary answer Councillor Smith also provided an assurance that the bridge would definitely be built.

However, in a subsequent freedom of information response (Reference No: 448512) Lewisham Council stated:

"The current position is that the cost of the bridge and associated works are beyond the available funding provision. Officers are considering the next steps and processes, all which take time and require legal processes to be adhered to alongside negotiations with Barratt's and Network Rail."

Can Lewisham Council please provide an update of the "consideration of next steps and processes"? Can an explanation also be provided as to why such a specific infrastructure project was set under a 106 agreement if Lewisham Council was not willing to actively enforce it following planning approval for the Barratt's development

of the former Catford dogtrack being set a decade ago? Finally, have the costs of the bridge merely escalated due to lack of active enforcement and action by Lewisham Council?

Reply

Section 106 agreements are made in accordance with the need to mitigate the impact of development upon the borough's infrastructure. A decade ago the Council wished to secure a route that would connect residents with Ladywell Fields and the town centre. The footbridge has however proved to be more challenging to deliver than could have been assumed at the time that the terms of the Section 106 agreement were agreed. In particular with regards to achieving both an equalities compliant design and meeting the requirements of Network Rail, which have changed extensively since the footbridge was originally conceived. It is these challenges that have contributed to the increase in the design costs from those assumed in the original budget. The Council has continued to work with Barratt's throughout this period to develop the bridge design with the full intent of its delivery under the terms of the Section 106 agreement

However on 8 June 2018 the Council received a letter, sent on behalf of Barratt's, which confirmed that despite having used considerable efforts to deliver the footbridge over the preceding years, as they will be off-site by September 2018 and the construction of the footbridge has not yet been commenced, they now wished to pay the footbridge contribution to Lewisham in accordance with the provisions of the S106 Agreement, rather than construct the footbridge themselves.

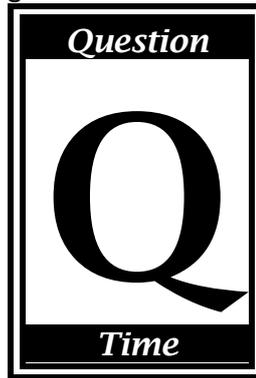
Under the terms of the Section 106 Agreement the Council then has to either apply the footbridge contribution for the purposes of delivering the footbridge itself or for either Station Improvement Purposes (as defined in the Section 106 Agreement) and/or such other infrastructure improvements in the vicinity of and relating to the development as are notified to Barratt's and which in the Council's opinion meet certain legal tests. The Council cannot at this point require Barratt's to construct the footbridge themselves.

It is clear that an additional budgetary resource will be required to enable the Council to deliver the footbridge. However, a decision to seek to secure further funding and deliver the footbridge must now be carefully considered in the context of the regeneration plans for Catford.

The Council has appointed a team of architects and urban designers to develop a Masterplan to support the Council's regeneration plans. Together with the Council, these advisors will be looking at how to maximise improvements to Catford town centre via a fully rounded Masterplan which will also inform upon key routes and way-finding strategies particularly within key transport connection areas.

Under the current programme, the team will undertake a public consultation around Jan/ Feb 2019. Seeking public opinion on the draft plans may also inform whether the footbridge is still required for the purposes for which it was originally sought or whether other improvements can more effectively secure those aims.

Therefore a decision on how to apply the footbridge contribution once received will be taken by the Council after considering the outcomes of the Masterplan process.



PUBLIC QUESTION NO 10.

Priority 1

LONDON BOROUGH OF LEWISHAM

COUNCIL MEETING

18 JULY 2018

Question asked by: Mr Maines

Member to reply: The Mayor

Question

Since being elected as Mayor have you met with:

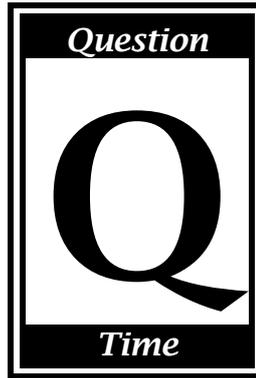
- i) the Chief Executive of Millwall FC or a representative from the club or the Community Trust, regarding the proposed development adjacent to the Den?
- ii) any representatives of Renewal - the property developers linked with the proposed development around the Den?

Would you make a statement of the current position regarding the proposed New Bermondsey regeneration and your thoughts about this proposed development?

Reply

I recently held a joint meeting with the Chief Executive of Millwall Football Club and the Directors of Renewal. The purpose was to seek to bring the parties together to see if a more positive engagement was possible in delivering the regeneration of the area around Millwall Football Club.

The Council's overriding objective is to see this strategic site brought forward for development in a unified and integrated way in accordance with a masterplan. Both Millwall and Renewal agreed the meeting was useful and we will be meeting again over the coming weeks.



PUBLIC QUESTION NO 11.

Priority 1

LONDON BOROUGH OF LEWISHAM

COUNCIL MEETING

18 JULY 2018

Question asked by: Andrea Carey Fuller

Member to reply: Cllr Bell

Question

Can you confirm the recent decision by Mayor and Cabinet on 27 June, to go ahead with the current planning application to develop Old Tidemill School will in addition to destroying 16 social homes 2-30A Reginald Road, will also destroy Old Tidemill Wildlife Garden?

Are you aware Tidemill Wildlife Garden, as a one of its kind garden in Deptford, occupies some 2,400 sqm of nature green space and was built on the Old Tidemill School Playing Field around 25 years ago by local people and children from the School, funded from public money and opened by the Mayor Dave Sullivan? Having a wide range of bio-diversity in it, including spotted belly newts, bats, birds, and other wildlife and over 70 mature trees, and two irreplaceable Indian Bean trees, it is not only the green lungs of South Deptford but it ensures cleaner air for local residents: Deptford Church Street is 1 (Out of 8) of the top hotspots for Air pollution in the Borough (on the Council's Air Quality Pollution plans).

Do you agree the current planning application breaches the National Policy Planning Framework paragraph 109, London Planning Policies: 3.5, 3.6, 3.12, 5.10, 5.11, 7.18, 7.19, Lewisham Open Spaces Strategy, Lewisham Sustainable community

strategy, Lewisham Development Management Plan (Adopted 26 November 2014), London as a National Park City (which all wards in Lewisham are signed up to), Lewisham Biodiversity Partnership's A Natural Renaissance for Lewisham 2015-2020/ & The (new) London Environment Strategy & the fact that the Garden has also been cited as a Case Study in the Mayor of London's Greener City fund report (August 2017):

Why aren't the Council prepared to undertake a Community Collaborative Charrette process, which could be set up within a month and take place over a weekend, to come up with a better plan for the whole community? The outcome of which could be agreed by all parties taking part and would ensure that the garden and the social homes on the site are saved?

Reply

London is in the midst of the biggest housing crisis in nearly 100 years. We must build more homes for those who need them the most - those in temporary, nightly paid accommodation, those seeking refuge and those in our society who are most vulnerable. This is why this Council has committed to delivering 1,000 new social homes in the next four years.

The development of the former Tidemill school will provide a significant number of new, genuinely affordable, family homes to house residents in need. With the exception of the homes within the refurbished Tidemill school building, all of the homes on the development will be affordable. This includes 117 homes for social rent, a net increase of 104 social rented homes on the site, and every one of the families who moves into these homes will have lifetime security of tenure.

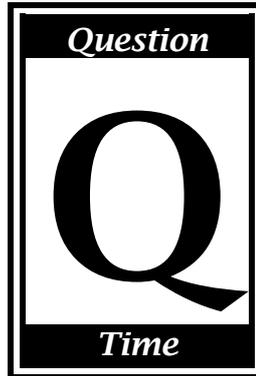
The part of the site where the Tidemill Community Garden is located was only ever intended to be used for a short period of time as a meanwhile use. However, over time, there can be no doubt that some members of the community who have access to the space have, understandably, become attached to it.

We do not take the decision to build on this space lightly. We have however weighed up the pressing need for social housing against the existing meanwhile use, and decided to deliver the social rented homes.

This is a development that can start imminently and which has been approved by both the Mayor of London and our own planning committee. A charrette would require us to start again, delay the delivery of these new homes for at least two years, and even then it would not be possible to deliver all of the outcomes the Council wishes to see on this site while retaining the garden in its current configuration.

Instead, both the Council and our development partner, Peabody, will continue to work with the local community to provide a truly open green space that all local residents can benefit from within the new development. Peabody is legally bound now to create a community-led steering group to oversee the plans for the open

spaces in the development, and we encourage the local community to engage with that process and help to shape their new neighbourhood.



PUBLIC QUESTION NO 12.

Priority 1

LONDON BOROUGH OF LEWISHAM

COUNCIL MEETING

18 JULY 2018

Question asked by: Rosalind Huish

Member to reply: Cllr Bell

Question

Please can you advise how the proposed removal of Tidemill Garden and Hillcrest Woods makes Lewisham greener as per the pledge on page 32 of the 2018 Lewisham Labour manifesto.

Reply

The Council is committed to delivering a greener borough and does not consider either of the proposed developments to compromise our commitment.

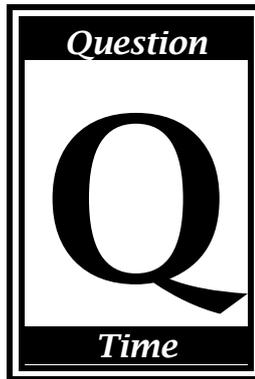
The Council does not intend to remove Hillcrest woods. Here, in partnership with Lewisham Homes, we are developing plans to introduce a minimal amount of new social housing while protecting the historic woodland. Currently the plans are for 21 new Council homes for social rent, targeted at areas of the Hillcrest and High Level Drive estates that are best suited to provide a small number of homes,

Following consultation the original plans have been revised significantly in order to minimise the amount and quality of trees and open space to be lost as a result of the proposed development. It is intended that the replacement trees, landscaping and ball court will satisfactorily mitigate the impact of the proposed development of a small number of new homes. As part of the planning process, Ecology Officers are currently interrogating relevant ecological documentation submitted with the application. However, as my colleagues on Planning Committee are yet to determine the application, I cannot comment further at this time.

The new development on the site of the former Tidemill school, as well as providing a net increase of 104 social rented homes, will also increase the number of trees on the site from 49 up to 73, meaning that there will be an increase in tree cover to help with biodiversity in the area.

Once complete, the development will contain a linear green space park measuring 1,560m² and a Pocket Park on the corner of Reginald Road and Deptford Church Street measuring 520m². In total this equates to 86% of the current green spaces on the site, but these spaces will be fully open to the public at all times.

In addition all of this space will be landscaped in line with the wishes of a community steering group that the developer is legally required to convene, and as such there is a significant opportunity here for the community to shape and influence the use of the spaces that are created.



PUBLIC QUESTION NO 13.

Priority 1

LONDON BOROUGH OF LEWISHAM

COUNCIL MEETING

18 JULY 2018

Question asked by: Ms Utley

Member to reply: Cllr Bell

Question

Please can Lewisham council supply all costs to date (2015-August 2018) incurred in developing proposals to demolish the Achilles Street area, including: all architects fees, plans, surveying costs, consultations, fees? Please provide a breakdown of these costs.

Reply

London is currently in the midst of a housing crisis and austerity measures have made it an even more challenging problem to solve. As a result, this Council is taking a wide range of measures to provide the homes its residents need. Over the past four years this Council started 500 Council homes and in the coming four years it will double that and start 1,000 social homes.

Over the past four years officers have been working in consultation with the local community around Achilles Street in New Cross to establish options for providing

new Council homes in the area as well as providing benefits to the existing community.

This work has been carried out using officer time, supported by external design advice as is standard on any consultation of this type. This work has focussed both on achieving a very high standard of design for any development that may come forward in the future, and on ensuring that the commitments the Council has made to enable the local community to stay and not be broken up are met.

In the first instance, this involved Lewisham Homes reviewing the potential to build a small development on the site of the current car park. This work was carried out in 2014/15 and revealed that existing residents had a number of concerns with their current homes. On that basis a wider study was commissioned, looking at options for development that could provide new homes for existing residents. This work involved a multi-disciplinary design team, covering architecture, engineering and other advisory support to ensure that we were presenting residents with meaningful and deliverable options.

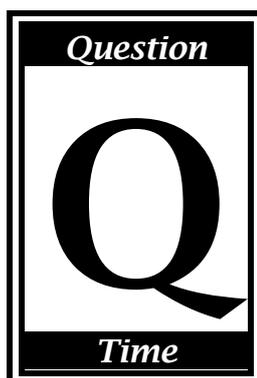
The breakdown of expenditure over the past four years of consultation and options appraisal is set out below.

	2014/15	2015/16	2016/17	2017/18
Design team	£29.5k	£112.4k	£101.8k	£10.0k
Other costs	£25.6k	£0	£40.6k	£24.0k

This level of spend is not uncommon for a scheme of this size and scale. However, it is important to note that whilst it is essential that the Council spends its money to build new genuinely affordable homes for our residents, the proposal must ultimately be financially viable.

All additional spending will be agreed by Mayor and Cabinet to ensure that the project continues in a transparent manner. This is expected to take place this autumn at the same time as Mayor and Cabinet formalising its commitment to ensuring no development takes place in the area without it being supported by a ballot of residents.

Finally, we are not demolishing the Achilles Street area and forcing people out. We are looking at ways to provide more social housing for our community, and no decisions have been made. The housing crisis plus the loss of council homes due to the right-to-buy, has led us to make bold steps to deliver on the manifesto we were elected on in May. One option in the future may be to rebuild the estate while guaranteeing that all residents can stay, but this would be subject to residents approving the idea in a ballot and it would be wrong to characterise this as forcing people out. It would be the opposite, new homes for every current resident and more additional council homes for other residents who need them.



PUBLIC QUESTION NO 14.

Priority 1

LONDON BOROUGH OF LEWISHAM

COUNCIL MEETING

18 JULY 2018

Question asked by: Mr Rochell

Member to reply: Cllr McGeevor

Question

With regard to current Lewisham Council policy on Electric Vehicle charging points with particular reference to On Street Residential charge points.

1. Is there a current Lewisham strategy to increase the number of charging points in the borough?
2. Is the strategy being carried out in conjunction with National and London policy, and have applications for grants been submitted, if so who with?
3. How could members of the public get involved in the process?
4. Have the council put in place any arrangements to work with partners to provide more charging points?
5. Are car clubs being encouraged to introduce more EV offerings in Lewisham?
6. Will the council be meeting the London Plan stipulation for 20% of all new parking to have a charging point?
7. Has the council looked at the possibility of subsidised parking for EVs?
8. What is the current % of EVs to EV chargers in Lewisham.
9. What is the total number of EV charging points in Lee Green?

10. Will residents be consulted on the design and location of charging points?

Reply

1. Is there a current Lewisham strategy to increase the number of charging points in the borough?

We are currently consulting on the borough first low emission vehicle charging strategy (LEVS) (<https://consultation.lewisham.gov.uk/corporate-policy-and-governance/lewisham-low-emission-vehicle-strategy/>)

Closing on the 13th August.

In the strategy we set out our delivery plan to increase the number of charge points available to Lewisham residents and visitors.

The Vision of the draft strategy is *“To ensure that all of Lewisham’s residents, businesses and visitors are within 500m of a charging point by 2020, with a range of options available that remain fit for purpose and encourage further uptake of low emission vehicles.”*

2. Is the strategy being carried out in conjunction with National and London policy, and have applications for grants been submitted, if so who with?

Lewisham is a member of the London Councils Low Emissions Vehicle Working Group, in order to stay up to date with evolving policy and good practice. Our draft strategy aligns with the aims and objectives set out in London wide policy documents such as the London Plan and the Mayors Transport Strategy (2018).

We have also successfully secured £300K, 75% match funding from OLEV (Office for Low Emission Vehicles) via London Councils and 100K 25% (match funding) through the boroughs LIP for the instillation of charge points, these points will consist of rapid, fast and lamp column charging options to cater for different users.

3. How could members of the public get involved in the process?

Member of the public can get involved by firstly responding to the open consultation of our LEVS. They can also visit the dedicated LEV page on the council website and log a request for a charge point in their street.

<https://www.lewisham.gov.uk/myserVICES/transport/sustainable-transport/Pages/Electric-vehicle-charge-points.aspx>

This page is going to be updated after the Draft Strategy has been finalised with hopefully an even easier way to log requests but for now people can log a request by emailing the address on the above page.

4. Have the council put in place any arrangements to work with partners to provide more charging points?

We have an existing provider of charge point in the borough (Source London) they have 10 existing sites and are currently investigating further locations. In preparation for a wider roll out of points identified in the LEVS we are looking at bringing further providers into the borough to ensure value for money for residents and also to offer different charging solutions. London Councils in partnership with TfL are very close to being able to offer the borough a call down Framework contract that Lewisham will be using to secure providers to deliver further charge points.

5. Are car clubs being encouraged to introduce more EV offerings in Lewisham?

The boroughs existing car club provider (Zip Car) have indicated they would be interested in converting a proportion of their fleet to electric, there is an issue around the capital costs of the charge points and fleet change. The funding the council has secured to implement charge points cannot be used to install charge points for the exclusive use of private car clubs due to the 'State Aid' regulations. However as part of the Councils new Local Plan currently being developed we are considering all new car club bays in the borough to be EV's. While also securing funding through developer CIL contributions to pay for car club site within or close to new developments.

6. Will the council be meeting the London Plan stipulation for 20% of all new parking to have a charging point?

We are currently developing the borough new Local Plan which looks to deliver at a local level the requirements set out in the London Plan. The 20% of new parking having a charge point is something we will be looking to achieve. Along the wider objective to reduce overall motorised traffic levels with reassignment to more sustainable modes of transport such as Public transport network, Cycling and Walking.

7. Has the council looked at the possibility of subsidised parking for EVs?

At the moment we don't charge for parking in EV bays, on or off-street (the only charge is the one made by Source London for usage of the charging point). We do not have a reduced tariff for paid for parking places (e.g. P&D or Pay by phone) but we do have a reduced cost for resident permits (for parking in a Controlled Parking Zone) for low emission vehicles. Normally a resident permit costs £120 p.a., but this is reduced to £30 p.a. for fuel efficient vehicles in tax bands A-B. The council is also being mindful that the borough also has a desire to reduce overall traffic levels to ease congestion and make Lewisham streets healthy. While a 100% change from fossil fuelled vehicles to EV's would improve local air quality it would not improve the congestion and road safety issues.

8. What is the current % of EVs to EV chargers in Lewisham?

This is a hard question to answer accurately as we do not have data regarding to the number of private charge points in Lewisham whether that be residential or on private car parks.

The latest EV ownership figures in Lewisham show as of March 2018 there were 279 EV's registered to residents of Lewisham. We expect this figure to keep growing year on year, which is why the strategy sets out a clear delivery plan for instillation of charge points to cater for this growth.

9. What is the total number of EV charging points in Lee Green?

Ignoring private charge points which as mentioned above we do not hold data on, there are no Council implemented charge points in Lee Green. However the strategy sets out a coverage model that looks to provide a charge point every 500m or in walking terms a 5 to 10 minute walk from every charge point location in Lewisham including Lee Green by 2020

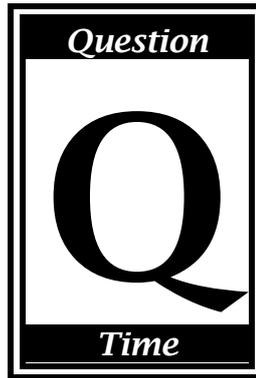
10. Will residents be consulted on the design and location of charging points?

We are looking to deliver a coverage model as mentioned above (500m or a 5-10 minute walk) however we are also within that model looking to deliver demand driven infrastructure and residents can register interest in charge point via the Lewisham EV web page.

In terms of design there are currently several different types of charge point. For residential EV charging solutions we are currently looking at a charge point that is either contained within an existing lamp column if the column is situated at the front of the footway or, If the column is not at the front of the footway we would either look to move that particular column to the front of the footway or to provide a satellite charging bollard that would be feed from the column. Meaning there are little in the way of 'design' to be considered. These charge point would be installed under the councils permitted development right and would not be subject to planning applications.

Larger free standing 'fast' and 'rapid' charge points differ in design varying in width, colour and height. Free standing points proposed on the boroughs roads are subject to Planning law and an application per point is required giving members of the public the opportunity to comment on each individual point.

The only exception to this are charge points installed on TfL's Strategic Road Network (Red Routes). TfL who are the traffic authority on these road have taken the view that these free standing points can be installed under permitted development rights and do not go through planning applications for these points.



PUBLIC QUESTION NO 15.

Priority 1

LONDON BOROUGH OF LEWISHAM

COUNCIL MEETING

18 JULY 2018

Question asked by: Andy Tonge

Member to reply: Cllr McGeevor

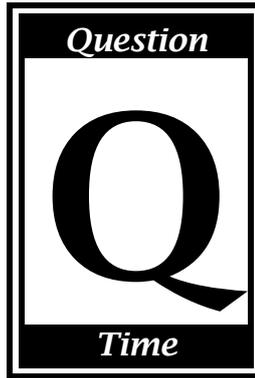
Question

The Active Forum minutes of 11th October 2017, taken by the Beckenham Place Park Community Engagement Officer, referred to Beastway taking a rotary mower into Beckenham Place Park, subsequently followed by photographs on the Beastway Facebook page of members with pickaxes and saws in the ancient woodland of Beckenham Place Park. Please advise what health and safety measures were put in place to safeguard other members of the public from the activities of Beastway using this kit who, themselves, are ordinary members of the public, rather than skilled operatives, and most importantly, please explain why they were allowed to hack out trails for mountain bike races in the ancient woodland?

Reply

Beastway sought consent from the Council to run a series of three mountain bike races over the winter months as detailed in the response to public question 1 (please find text enclosed with this response). Appropriate ecological guidance was sought and followed prior to the events.

The organiser of the events submitted risk assessments and method statements for the limited work needed to prepare the routes for the Council's approval and secured all necessary consents. They also procured and supplied evidence of appropriate public liability insurance for both trail preparation and race days. Members of the public were excluded from the work area through the use of advance notices reporting path closure, and access was also taped off to maintain a minimum 15 metre exclusion distance.



PUBLIC QUESTION NO 16.

Priority 1

LONDON BOROUGH OF LEWISHAM

COUNCIL MEETING

18 JULY 2018

Question asked by: Anthony Crowther

Member to reply: Cllr McGeevor

Question

The Lewisham Air app launched in March 2018.

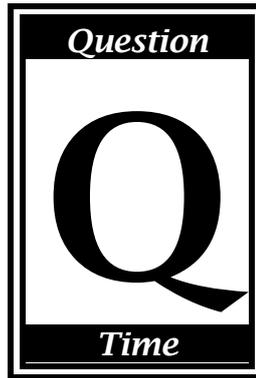
- How much has the Council spent on the development and promotion of the app?
- How many downloads have there been in total?
- How is usage and the impact of the app being monitored and measured?

Reply

- The Lewisham Air app launched in March 2018
- How much has the Council spent on the development and promotion of the app?
 - The total cost for the development has been £15,000
- How many downloads have there been in total?
 - Up to 6th July there have been 482 downloads of the app.
- How is usage and the impact of the app being monitored and measured?

- We have a regular Key Performance Indicator where we monitor the monthly details on numbers of downloads. We promoted the app as part of the successful National Clean Air Day on 21st June 2018 and at this year's People's Day.

We have made details available at local surgeries, libraries and primary schools. A recent business card has been designed and produced and is being used to promote the app throughout the borough.



PUBLIC QUESTION NO 17.

Priority 1

LONDON BOROUGH OF LEWISHAM

COUNCIL MEETING

18 JULY 2018

Question asked by: Ms Phipps

Member to reply: The Mayor

Question

The London Cycling Campaign and Liveable Streets reports that the Mayor did not sign their Liveable London Pledge. Could I now offer him again the opportunity to rectify this by

a) signalling his intention to sign up to their "Liveable London*" pledge to use the funding granted to Lewisham from the Liveable Neighbourhood Programme to: "deliver a high-quality and safe Liveable Neighbourhood that takes major steps to prioritise people walking and cycling over private cars in the area during the course of your term" and

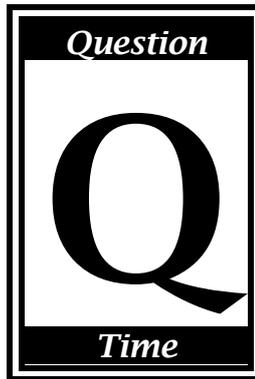
b) provide supporting evidence as to how this will be delivered within the specified time-frame

Reply

The Council's Liveable Neighbourhoods project for Deptford Parks aims to deliver a high-quality and safe Liveable Neighbourhood that takes major steps to prioritise

people walking and cycling over private cars. The Mayor would therefore be pleased to sign the Liveable London pledge.

The Council submitted its successful bid for Liveable Neighbourhood funding in October 2017. The bid, which was scrutinised and assessed by TfL, included an indicative programme to complete the project in 2021. This programme will be reviewed and updated as the project is further developed as part of the feasibility work that will be conducted this year.



PUBLIC QUESTION NO 18.

Priority 1

LONDON BOROUGH OF LEWISHAM

COUNCIL MEETING

18 JULY 2018

Question asked by: Trina Lynskey

Member to reply: The Mayor

Question

RE: DC/17/103827 | The alteration and conversion of six vacant commercial units (Use Class B1a) at The Arches, Childers Street, SE8

This proposal is scheduled to be heard on Thursday July 5th at Planning Committee A

How can Lewisham Council expect residents to accept large scale local development while accepting, without question, a developer commissioned marketing report that business units are not viable in this area?

Will the council honour the commitment to residents and adhere to its own policy and hold a public meeting in advance of any determination by committee?

Will the council listen to the views of elected members that these units are neither

suitable for human habitation or surplus to local requirement as employment floorspace in the New Cross & Deptford Creative Employment Zone?

Reply

The Council's Statement of Community Involvement does not envisage a situation where the Council is no longer able to make a decision on the application (in this case the applicant has already submitted an appeal to the Planning Inspectorate). The applicant ceased to engage with officers on the matter of arranging a Local Meeting following the submission of their appeal.

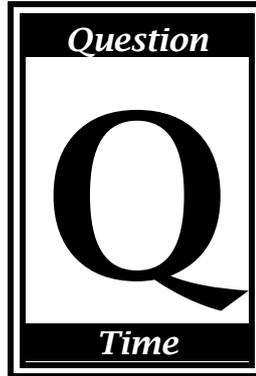
However, whilst officers are required to be mindful of delays being portrayed to represent unreasonable behaviour, and potentially lead to an award of costs against the Council, in this instance it is accepted that a further and final opportunity is provided to the applicant to be involved in a Local Meeting.

Officers therefore advised all Planning Committee A Members and Evelyn Ward Members that agenda item 3 relating to application DC/17/103827 for The Arches, Childers Street, SE8 was removed from the Committee agenda.

We informed all parties who have commented on the application, that we are able to contact, that the item was removed from the agenda.

Officers will identify and select a local meeting date within the next few weeks, which will occur with or without the applicant's involvement. The application will thereafter (not less than 2 weeks following the Local Meeting Date) be taken to the next available committee meeting.

Now the Council is subject to the appeal process, the subsequently convened Planning Committee will be the appropriate place to reach a view on the other specific issues raised by this question.



PUBLIC QUESTION NO 19.

Priority 1

LONDON BOROUGH OF LEWISHAM

COUNCIL MEETING

18 JULY 2018

Question asked by: Mr Richardson

Member to reply: Councillor Bonavia

Question

What was the cost to the London Borough of Lewisham of the by-election held in the Lewisham East parliamentary constituency on 14 June 2018?
Please may I have a breakdown of the figures?

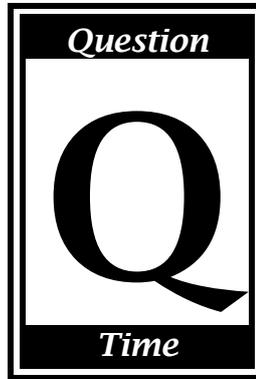
Reply

The approximate breakdown is as follows:-

Item	Cost
Count Staff	£13,572.50
Postal vote staff	£5,732.51
Polling staff	£52,333.92
Polling stations	£20,000.00

Equipment and transport	£9,000.00
Poll cards printing	£3,500.00
Poll cards postage	£27,000.00
Postal votes printing	£7,500.00
Postal votes postage	£9,000.00
Ballot papers printing	£7,000.00
	£154,638.93

The staffing costs are final, though the others remain as unconfirmed, but informed, estimates pending receipt of all invoices and finalisation of accounts.



PUBLIC QUESTION NO 20.

Priority 1

LONDON BOROUGH OF LEWISHAM

COUNCIL MEETING

18 JULY 2018

Question asked by: Loredana Minini

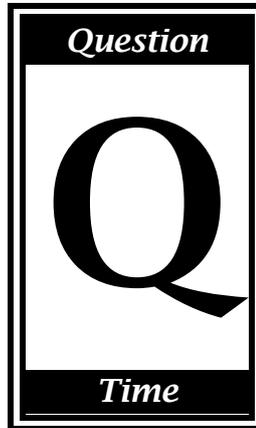
Member to reply: Councillor Bell

Question

Is the Council aware that EVEREST (Evelyn Residents Steering Forum), currently a coalition of seven Tenants and Residents Associations in North Deptford representing approximately 2000 households, is looking for about £10,000 to fund a pre-feasibility study for resident-led regeneration in their area? Everest has created a Masterplan of projects proposed by residents through its member TRAs and needs financial help to carry out the pre-feasibility study to be able to bid for S106 funds. Will the Council commit to support this residents-led organisation and to fund their pre-feasibility study?

Reply

The Council is aware of the work that EVEREST is involved in, and has had a number of meetings with the group. The Council is also engaging with EVEREST, other community groups, and residents through the Ward Assembly which meets regularly and which receives support from the Council, and which works directly with ward Members. The Council will continue to support residents and community groups in their work wherever possible. Due to the restrictions placed on S106 obligations there are limited funds available, and those which the Council has collected are normally directed towards capital projects. As such, the capacity of the Council to financially support this project, at the current stage, are limited.



PUBLIC QUESTION NO . 21

Priority 2

LONDON BOROUGH OF LEWISHAM

COUNCIL MEETING

18 JULY 2018

Question asked by: Carole Hope

Member to reply: Councillors McGeevor

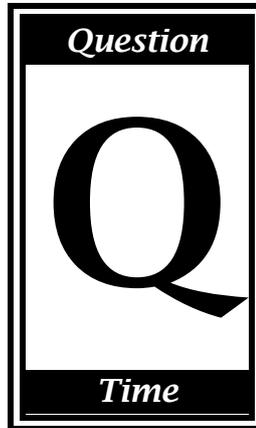
Question

In view of the crisis in air quality in London and as the London Plan aims to increase tree cover, please advise why healthy trees were felled in areas of Beckenham Place Park which do not form part of the 18th Century Parkland landscape and please advise how many more healthy trees are to be felled, in view of the fact that the tree canopy there has already reduced by 3 - 4 hectares?

Reply

Following closure of the golf course in 2016, work has begun on the restoration of the Georgian landscape at Beckenham Place Park. As outlined in our approved

planning application, this includes reinstatement of the lake and key views across the parkland which had been inhibited by insensitive golf course plantings from the early 1990's. Where trees were removed we focussed on removing those which were already dead, diseased, overcrowded or in poor form, all of which would have shortened lifespans. We will continue with our restoration work in the coming winter and will only remove trees when necessary to complete the restoration aims. Over the winter of 2016/17 we planted over 12,000 native trees to repair damage caused to the ancient woodland by the golf course fairways and to thicken the woodland fringe of the park. Over the coming winter working together with Trees for Cities and with continued support from the Mayor of London we will plant at least another 3,000 trees to continue expansion of the tree cover in the park. We are grateful for the financial support of the Mayor of London for these tree planting initiatives and to the more than 100 volunteers of all ages who have helped us achieve so much already.



PUBLIC QUESTION NO. 22

Priority 2

LONDON BOROUGH OF LEWISHAM

COUNCIL MEETING

18 JULY 2018

Question asked by: David D Silva Pereira

Member to reply: Councillor Bell

Question

Please could London and Quadrant and Notting Hill Genesis provide a breakdown of what estate services it provides on the Silwood Estate?

Reply

Services on the Silwood Estate are delivered by a combination of different agencies.

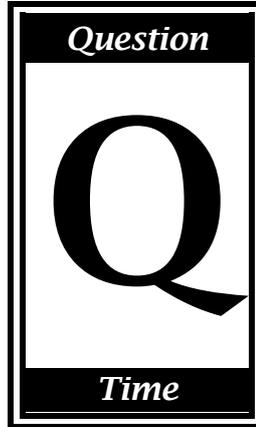
L&Q provide the following Estate Services:

- Grounds Maintenance
- Play Equipment Maintenance/Serviceing

- Communal Refuse Bin Hire
- Bulk Refuse Collection
- Communal Pest Control
- Buildings Insurance (not for blocks which have exercised the right to manage)
- Service Charge Audit Fees
- L&Q Admin Fee (Homeowners)

Notting Hill Genesis have units in the Silwood Street development, also known as Blueprint. This site is run by a Residents Management Committee (RMC), who have appointed an agent, HAUS. All estate and block services for this site are provided by HAUS, who also set service charges, on behalf of the Silwood Street RMC.

Lewisham Council provide street cleaning, street lighting, refuse collection and fly tip removal services.



PUBLIC QUESTION NO. 23

Priority 2

LONDON BOROUGH OF LEWISHAM

COUNCIL MEETING

18 JULY 2018

Question asked by: Mrs Richardson

Member to reply: Councillor Slater

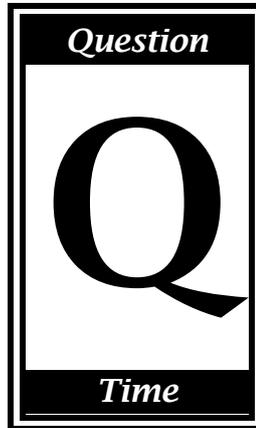
Question

From the 2018/2019 Library Service Budget Book, how much is allocated for stock, separately book stock and other stock?

Reply

The Stock Fund for the financial year 2018/2019 is £326,000. To date, £230,000 has been allocated which is broken down as follows:

Books	£148,700
Other stock	£ 81,300



PUBLIC QUESTION NO. 24

Priority 2

LONDON BOROUGH OF LEWISHAM

COUNCIL MEETING

18 JULY 2018

Question asked by: Mr Williams

Member to reply: Councillor McGeevor

Question

The Mayor of London's audit of pollution at the fifty school sites most impacted by air pollution was recently released. One of the schools in Evelyn Ward that is on this list is Deptford Park School, which sits directly on the congested Evelyn Street. Will the Council commit to urgently finding the money to create a Living Green Wall, one of the most effective ways of shielding the pupils attending the school from the most dangerous particulate matter?

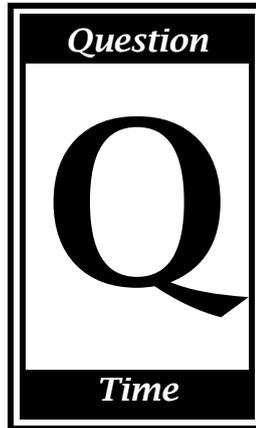
Reply

The Mayor of London carried out Air Quality Audits at three schools within the borough, which were St James Hatcham Primary, Haseltine Primary and Deptford

Park Primary. Details of the audit recommendations can be found in <https://www.london.gov.uk/what-we-do/environment/pollution-and-air-quality/mayors-school-air-quality-audit-programme>

One of the recommendations for Deptford Park Primary was 'install green screening/climbers around the exposed main playground to supplement the security fencing.'

As part of the Mayor of London's commitment to bringing improvements to the schools he has allocated £10,000 to fund one of the recommendations from the audit for each of the schools. The school and Council needs to meet with Transport for London (TfL) to put forward the proposal for how we'd like to use the money, which is subject to their approval. The Council is however currently looking at ways of funding the shortfall for installing a green screen, on the basis that TfL will agree to this. The Environmental Protection team are already in discussions with the school about this proposal. We are chasing TfL for a meeting so we can progress this as quickly as possible.



PUBLIC QUESTION NO 25.

Priority 2

LONDON BOROUGH OF LEWISHAM

COUNCIL MEETING

18 JULY 2018

Question asked by: Mr Morris

Member to reply: Councillor McGeevor

Question

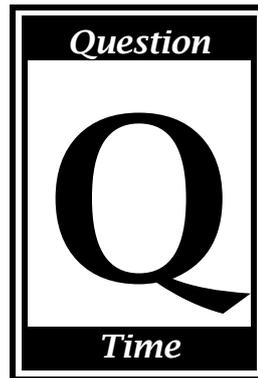
What is Lewisham Council's policy of enforcing pavements clear of street signs and other clutter, especially to assist blind and visually impaired people? Are you aware there has, for a long time, been a high number of shops signs on Rushey Green creating a number of obstacles for pedestrians, yet no action seems to be taken.

Reply

The Council is responsible for ensuring the pavements under its control allow the safe passage of pedestrians, and our Highways team has the power to remove items that are obstructing the highway or causing danger to the public. However, the Council is

also supportive of local businesses and offers licences, where appropriate, to enable businesses to safely locate items on forecourts and footways, provided there is enough space. The Council has also pledged to establish an accessibility commission that will look at ways to promote safe and secure access around our borough for all our residents and visitors.

The A21 Rushey Green is part of the Transport for London Road Network, and so TfL have responsibility for all signs and street furniture at this location. The Council would be happy to raise this issue with TfL to help de-clutter the area.



PUBLIC QUESTION NO. 26

Priority 1

LONDON BOROUGH OF LEWISHAM

COUNCIL MEETING

18 JULY 2018

Question asked by: Andrea Carey Fuller

Member to reply: Cllr Bell

Question

My question relates to the request from 80% (12 out of 15) Reginald Road residents whose homes are under threat of Demolition for an independent ballot on the future of their homes: This is as a result of a decision made by the Mayor and Cabinet on 27th June 2018 to go ahead with the current Tidemill Site Development Plans even though the majority of local residents are against these plans, and residents from Reginald House asked the Mayor in person to support alternative plans which would save their homes.

Sadiq Khan in passing this planning application back to Lewisham Council on 11th June 2018, urged the Mayor and Cabinet to give Residents an independent ballot following a petition by them to him and Lewisham Council which showed that 80% of the residents were against their homes being demolished.

The Mayor and Cabinet have not given any logical reason by they are not giving Reginald Road residents an independent ballot - given that the local community campaign would ensure that a community-led alternative plan for this site would equal and aim to increase the number of social homes on this Site.

So, as the number of social homes being built on this site would be the same if a community-led design were used - why isn't the Council (given this is one of the Mayor's Manifesto commitments) giving Reginald Road residents a ballot to determine the future of their homes?

Reply

The development at Reginald Road will contribute a significant number of new genuinely affordable, social rented, family homes to help address London's housing crisis. All homes, apart from those in the refurbished Tidemill school building, will be affordable of which 117 will be for social rent. This is a net increase of 104 social rented homes on the site.

The Council wants residents to help shape their neighbourhood and has undertaken extensive consultation in the past and is continuing to speak to residents. The design of the development has been consulted on extensively over a number of years in line with the existing legal framework that ensures that secure Council tenants are formally consulted and their views considered. Under this framework the views of secure tenants have considered by the Council's Mayor and Cabinet Committee on a number of occasions over a number of years.

This project is now ready to be delivered, as both the Mayor of London and our own Strategic Planning Committee have approved the plans and I support their recommendations.

The Council notes the Mayor of London's suggestion, within his Stage 2 response to the planning application, that the Council should consider a ballot. However, on 27 June the Council's Mayor and Cabinet resolved to extend the "longstop date" on the existing contract, and thereby to proceed with the development without retrospectively applying the need for a ballot. This decision was made for a number of reasons.

Firstly, it is important to note that, in his letter, the Mayor of London also stated that he will not require Peabody to carry out a ballot in this instance to obtain GLA funding. This is because there is already a contract in place between Peabody and the GLA, and this constraint also applies to the Council which has its own contract with Peabody. It is technically possible to renegotiate any contract, but this comes with a financial cost and significant delay to delivery.

Secondly, within his draft guidance on ballots, the Mayor of London notes that the appropriate time to undertake a ballot is before plans have been developed, well in advance of planning permission being granted. This development is much further advanced than that, and as is the case across London, the GLA's draft guidance does not expect the requirement for ballots to be implemented retrospectively in these instances.

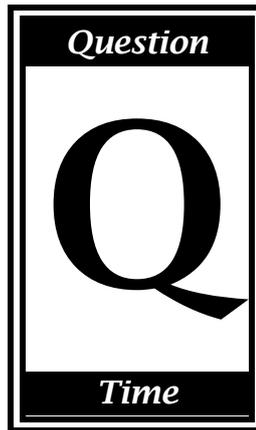
Thirdly, this development has been brought forward in close consultation with the community, and the view of secure tenants have been considered when decisions have been made. The legislative framework for the Council in carrying out projects like this is the Housing Act of 1985, Section 105 of which requires that secure tenants are meaningfully consulted on issues that materially affect their tenancies, and the Council has done this, and considered the feedback from that consultation on a number of occasions over the past six years. While in the future the GLA may formalise its draft guidance, and the Council may choose to take its own policy position, it should be noted and remembered that this project has come forward in line with the current legal requirements on the Council to engage with its residents.

Finally, and most importantly, holding a ballot now will mean delay and that the very many benefits that this project will bring cannot be delivered for Lewisham residents in housing need. The most notable benefit of the development will be a net increase of 104 social rented homes on the Tidemill site, all of which will have lifetime security of tenure. There are 9,500 Lewisham households in housing need on its Housing Register, of which 1,900 are homeless and in temporary accommodation. These residents equally need to be considered in our decision making, and delaying now would delay the opportunity to house 104 homeless families securely and permanently.

We also acknowledge the request to look at a different design. However, the plans are simply too far advanced to stop and re-start. Furthermore, as noted by the Mayor of London, the alternative scheme that was prepared has not been through detailed technical assessment or testing.

The key point is that it could take up to two years to look at an alternative, at a significant additional cost, and with no certainty that at the conclusion of the exercise there will be any significant additional benefit to what is available now.

This has not been an easy decision for the Council but it has concluded that, on balance, it is better to proceed with the project as it stands, and obtain the benefits of that as soon as possible, rather than to have further delay of the benefits and more uncertainty for residents, both those in Reginald House and those who are homeless and dispersed around south east London and Kent and who await a home of their own.



PUBLIC QUESTION NO. 27

Priority 2

LONDON BOROUGH OF LEWISHAM

COUNCIL MEETING

18 JULY 2018

Question asked by: Rosalind Huish

Member to reply: Councillor Bonavia

Question

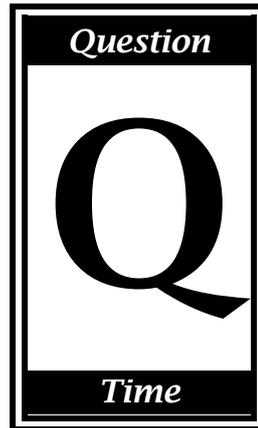
Please can you share the Council's social media policy and details of social media training provided to officers and councillors?

Reply

We are in the process of updating the Council's Social Media Policy and once agreed it will be available on the Council website. We aim to publish it in the next few months.

Social media training is provided to councillors with the next training session taking place in September by Mosaic Media Training. For officers, training is largely provided internally.

In the meantime, councillors and officers are required to abide by the respective Codes of Conduct contained within the Council's Constitution. These set out the expected standards of behaviour in their communications with other parties, regardless of how they are made.



PUBLIC QUESTION NO. 28

Priority 2

LONDON BOROUGH OF LEWISHAM

COUNCIL MEETING

18 JULY 2018

Question asked by: Andy Tonge

Member to reply: Councillor McGeevor

Question

Prior to the closure of the public golf course in Beckenham Place Park, officers released details of the Council's contract with Glendale golf, thereby establishing that income accrued from such commercial usage of a Council facility is not commercially sensitive data. Please, advise details of the income generated by the cycle racing activities in the park operated by Beastway and advise on overall progress against the income generation target that underpinned the Sustainability Plan that formed a

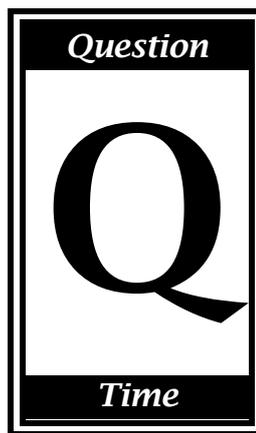
part of the submission for HLF funding, and formed a part of the documentation suite submitted for planning approval.

Reply

The council believes that it was appropriate to provide details of the income from the public golf course prior to a decision being taken on its future by the Mayor in February 2016. When considering the loss of a long running public facility the public interest test was in favour of disclosure of this information.

There is no compelling argument that the same disclosure should apply to fees paid for small ad hoc events of a temporary nature which have no long term impact on park users. Disclosure of fees paid by hirers could impact on the fees they are expected to pay elsewhere and could reduce the Council's ability to negotiate future hire charges.

Income expected to be derived from use of the park and its buildings is projected from the 2019/20 financial year onwards, as we are reliant on the ability of the restored buildings and parkland to generate income to support the park's maintenance and running costs. It is therefore too early to advise on progress as this restoration work has only just begun.



PUBLIC QUESTION NO. 29

Priority 2

LONDON BOROUGH OF LEWISHAM

COUNCIL MEETING

18 JULY 2018

Question asked by: Anthony Crowther

Member to reply: Councillor McGeevor

Question

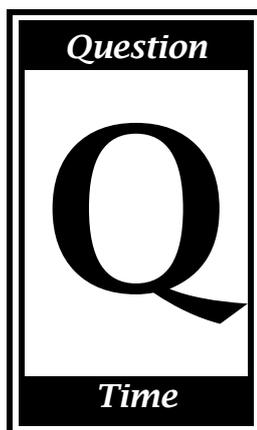
According to the Council's website there are only two locations where residents can take lightbulbs to be recycled in Lewisham. One is the reuse and recycling centre in New Cross and the other at Lewisham Library.

Does the Council have a record of how many light bulbs are recycled at these facilities? Are there any plans to increase the number of locations light bulbs can be recycled?

Reply

We currently have domestic light bulb recycling facilities in the south of the borough at Lewisham Library and in the north at the Reuse and Recycling centre. There are additional locations for commercial light bulb recycling across the borough. These are located at Chiltonian Industrial Estate Manor Lane SE12 and Bell Green Retail Park SE26.

We do not count individual light bulbs that have been recycled but we do record the tonnage. During 2017/18 a total of 0.5 tonnes were collected and recycled. There are currently no plans to extend this service but this will be reviewed over the next 6 months.



PUBLIC QUESTION NO. 30

Priority 2

LONDON BOROUGH OF LEWISHAM

COUNCIL MEETING

18 JULY 2018

Question asked by: Ms Phipps

Member to reply: Councillor McGeevor

Question

Nearly 10,000 people have signed a petition to call for a Car Free Day in London this September. Studies show that the same number of people are dying every year from air pollution in London - car free days offer an opportunity to reduce this risk on the day in question and encourage residents to rethink their travel options. Will the

council commit to holding its own Car Free Day, with the exception of essential travel, this September on borough controlled roads, and negotiate with TfL arrangements for those roads through Lewisham not under the councils control?

Reply

Lewisham is committed to improving air quality as part of our healthy streets initiatives. As part of the work we do in partnership with TFL we encourage sustainable modes of travel, promoting public transport, cycling and walking throughout the year. The Quietway 1 cycle route has been opened and we are looking at ways of joining up the existing routes to encourage more families to enjoy cycling.

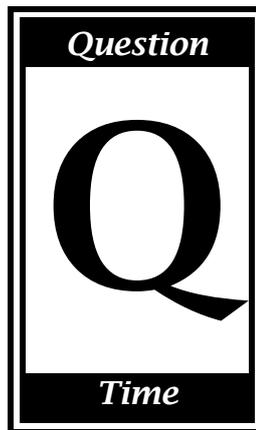
The campaign for a car-free day this year is on the 22nd of September we will be promoting the initiative to schools and through the council social media channels to raise awareness.

We will also look at offering a list of 'easy to do' options for local residents to support the initiative in their own way, such as information on the current cycling initiatives, the routes in Lewisham but also promote the benefits of walking and cycling on health and the environment.

The borough runs events throughout the year with schools to highlight the impact of travelling to school by car. As part of a School Travel Plan programme of work initiatives to reduce the number of children being driven to school is one of the main measures of success. In recent years this has included a temporary street closure at school drop off and pick up times. Schools are invited to apply for a temporary closure through the school travel plan programme, each request will be looked at individually by the Highways Team and supported wherever possible. We hope to increase the number of requests from schools, however the school is responsible for the management of it at this time, but should funds become available in the Local Implementation Plan we will investigate how to make temporary street closures and play streets easier for schools to deliver.

We will also look at where we can reduce car use within the Council. We promote campaigns to encourage cycling and walking through the year in Bike Week, Walk to school week, etc. We will also be introducing dockless bikes in to the borough this year as a further incentive to leave the car at home.

As a council we will continue to promote reducing car use by using sustainable modes of travel throughout the year in schools and at public events.



PUBLIC QUESTION NO. 31

Priority 2

LONDON BOROUGH OF LEWISHAM

COUNCIL MEETING

18 JULY 2018

Question asked by: Mr Richardson

Member to reply: The Mayor

Question

The issue of digital exclusion by various levels of government in running their affairs interacting with the public was raised at a local hustings in Lewisham before the local elections in May 2018. As Lewisham Council has accepted fully the policy of digitisation does the newly elected Mayor have any plans/policy to ensure that the

already disadvantaged and socially excluded are not further isolated and cut off from essential services and government information?

Reply

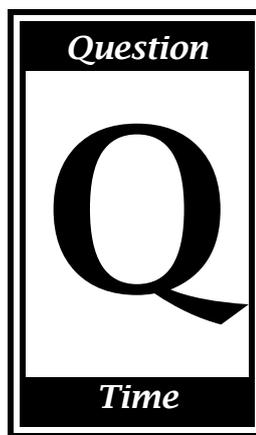
Although there has been a significant shift to online services, the Council recognises that there are residents who have difficulty using online services. The following measures have been put in place to ensure that those who are experiencing difficulty in accessing online services are not marginalised by the digital age.

Since January 2016 there has been a borough-wide project to address digital inclusion. The project provides support networks for those who want to get online and ensures that there are suitable alternatives for those who are experiencing difficulty. We are working closely with the Department of Work and Pensions and local housing providers to safeguard vulnerable people as they transition to government online Universal Credit.

Council alternatives to online include:

- The Benefits department provide telephone service for new claims
- Benefits change of circumstances evidence remains a postal service
- Telephone facilities are still available for all other Council services via a same day call back provision
- Customer Service Centre operate walk-in for forms and evidence service
- Digital Zones – There are specific support sessions in Catford library that provide training and guidance for residents to help them access digital services. Residents can learn to use their own smartphone or tablet to access Council services.

At the same time, I recognise that the Council's current website, created in 2012, needs a major refresh. I have asked for significant improvements to be made to the Council's website and online resources, making improvements to stability and improving accessibility for all residents. The Council's new website will be launched soon.



PUBLIC QUESTION NO. 32

Priority 2

LONDON BOROUGH OF LEWISHAM

COUNCIL MEETING

18 JULY 2018

Question asked by: Loredana Minini

Member to reply: Councillor Bell

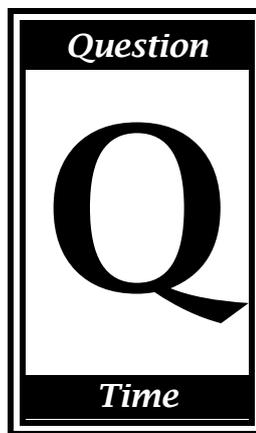
Question

Is the Council aware that the regeneration of Rainsborough Avenue under a S106 agreement with Barratt London has resulted in several problems: (1) The newly planted trees are currently not watered and could die in the hot weather, (2) some of

the grass was laid on a concrete base and has now died (3) a strip of land planted with wild flowers is now dry and looks very neglected. Will the Council commit to maintaining/watering the newly planted trees regularly and help residents to rectify the poor planting on this road?

Reply

The land in question is owned by the Council. The landscaping referred to was paid for and carried out in connection with an adjoining private residential development scheme. The trees were not planted by Lewisham Homes therefore I have asked officers from the Councils Open Space Management team to inspect the site, assess the condition of the trees and arrange for any necessary maintenance.



PUBLIC QUESTION NO. 33

Priority 2

LONDON BOROUGH OF LEWISHAM

COUNCIL MEETING

18 JULY 2018

Question asked by: Trina Lynskey

Member to reply: The Mayor

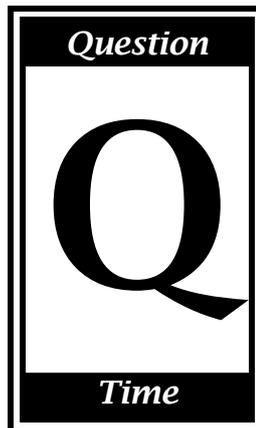
Question

Will Lewisham Council commit to allocating £300k this summer to improving Folkestone Gardens, Sayes Court Park and Silwood play spaces for universal benefit to all children and support Early Years education and health outcomes?

Reply

The only potential funds which are available to support large scale landscape and play spaces improvements are Section 106 receipts. Access to Section 106 funding is strictly controlled with processes in place to ensure the monies held are spent appropriately and in accordance with the terms of the legal agreements which have been signed with developers.

While the Council cannot therefore commit to allocating this money until the proper processes have been followed, I will ask the appropriate officers to look into the availability of any unallocated Section 106 funds.



PUBLIC QUESTION NO. 34

Priority 3

LONDON BOROUGH OF LEWISHAM

COUNCIL MEETING

18 JULY 2018

Question asked by: Carole Hope

Member to reply: Councillors McGeevor

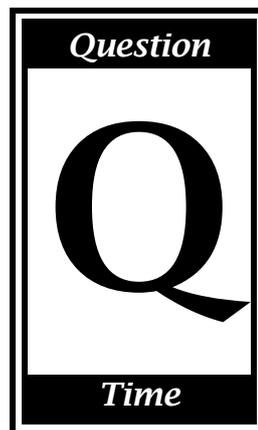
Question

Please advise why the new information boards at Beckenham Place Park make no reference to the Flood Alleviation Scheme previously advised for the east of the park, nor any of the features associated with it that would specifically benefit the Lewisham residents close to that area i.e. toilets, upgraded skate park, upgraded children's play area and new adventure play for older children?

Reply

The information boards which have been erected in the west side of Beckenham Place Park give details of the works that are currently on site. They are located close to where work is happening so that visitors understand that the disruption in that location is for a good cause and they provide details of what is being created at each location.

As the Environment Agency scheme on the east side of the railway lines is not at the works stage and the east side of the park is unaffected by the works it is not detailed on the information boards.



PUBLIC QUESTION NO. 35

Priority 3

LONDON BOROUGH OF LEWISHAM

COUNCIL MEETING

18 JULY 2018

Question asked by: David Da Silva Pereira

Member to reply: Councillor McGeevor

Question

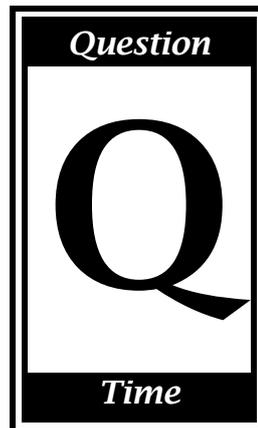
What is the Council going to do about the fly tipping on the Silwood Estate and Bolina Road?

Reply

The Council continues to take fly-tipping very seriously and investigates a substantial amount of incidents every month. The Council is deploying CCTV cameras at fly-tipping hotspots borough wide and has invested in three new high spec Automatic Number Plate Recognition High Definition cameras during the past 12 months at a significant cost.

Borough wide (including Evelyn & New Cross Wards) the Council's Clean Streets (Enforcement) Team take a zero tolerance approach to fly-tipping issuing on the spot fines to those fly-tipping and to those not maintaining waste disposal documents. In Evelyn & New Cross 68 Fixed Penalty Notices have been issued for waste offences in the past 12 months. We continue to issue £400 fly-tipping Fixed Penalties and have doubled the litter penalty from £75 to £150 earlier this year.

We are also in the process of looking at whether joint up working with the London Borough of Southwark may be necessary to resolve issues in the Evelyn area on the Lewisham/Southwark boundary.



PUBLIC QUESTION NO. 36

Priority 3

LONDON BOROUGH OF LEWISHAM

COUNCIL MEETING

18 JULY 2018

Question asked by: Mrs Richardson

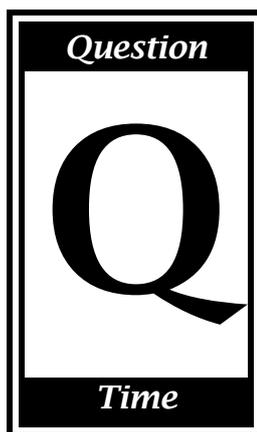
Member to reply: Councillor Slater

Question

How many weddings and/or civil ceremonies have been held at the Manor House Library from 1st June 2017 until 30th June 2018?

Reply

Manor House hosted 6 ceremonies between 1 June 2017 and 30 June 2018.



PUBLIC QUESTION NO. 37

Priority 3

LONDON BOROUGH OF LEWISHAM

COUNCIL MEETING

18 JULY 2018

Question asked by: Mr Williams

Member to reply: The Mayor

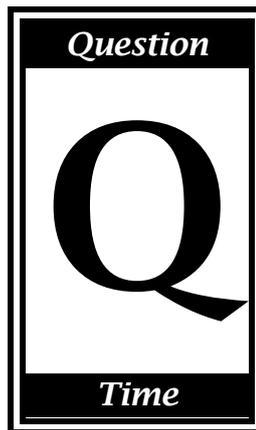
Question

Will the Mayor commit, finally, to ruling out CPO on the land around Millwall's stadium once and for all?

Reply

A fresh decision would be required in order for any CPO on the land around Millwall's stadium to be made. I recently met with Millwall and Renewal to facilitate positive engagement between them.

I want to see a development that has the support of the community. I am committed to ensuring that Millwall FC is based in Lewisham for generations to come.



PUBLIC QUESTION NO. 38

Priority 3

LONDON BOROUGH OF LEWISHAM

COUNCIL MEETING

18 JULY 2018

Question asked by: Rosalind Huish

Member to reply: Cllr Bonavia

Question

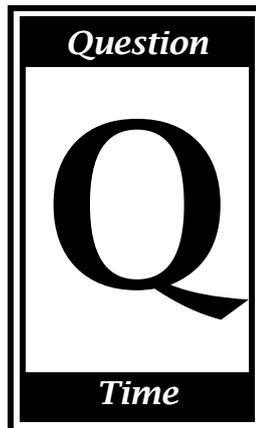
When was end user testing last carried out on the council website - specifically around ease of access to information?

Reply

User testing on the current Council website was last carried out between 9 and 19 April 2018. Two full days were used in Catford Library to test the website with members of the public during this time. The testing was carried out for the Council independently by user experience experts, RedWeb.

Some 15 people took part using different devices - 10 people using desktops and 5 using mobile devices.

Recommendations from the testing are feeding into current work to build a new Council website which is due to go live later this year. In addition, as part of the testing of the new website before it goes live, we will seek the input of residents of variety of personal backgrounds, especially those who find it more difficult than average in using information technology.



PUBLIC QUESTION NO. 39

Priority 3

LONDON BOROUGH OF LEWISHAM

COUNCIL MEETING

18 JULY 2018

Question asked by: Andy Tonge

Member to reply: Cllr McGeevor

Question

At the recent Beckenham Place Park flower show there were people outside the mansion manually recording on paper the postcodes of people as they entered the building. What percentage of people from Lewisham post codes were recorded and will the Council make available those paper records for inspection?

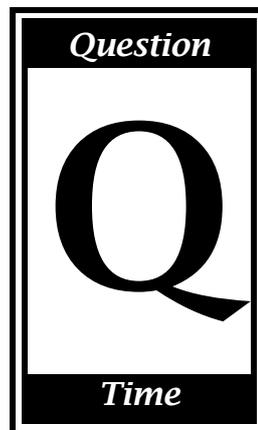
Reply

The BPP Flower show visitor survey was a snap shot survey to help us report back to our funders and also to help us plan and market future events. It was undertaken by volunteers and will not have recorded all visitors to the event, but will give some idea of reach.

Upon reviewing the survey, we discovered that the volunteers hadn't often filled in the full postcode. Where the first part was completed, we have provided a tally for these postcode areas in the table below. Due to some partial postcodes crossing borough boundaries it is not possible to give a definitive percentage of residents from Lewisham who attended. Copies of the survey can be requested from the project team.

Postcode	Number	%
SE1	1	0.44%
SE4	5	2.18%
SE6	38	16.59%
SE8	1	0.44%
SE9	2	0.87%
SE12	4	1.75%
SE13	6	2.62%
SE14	1	0.44%
SE15	1	0.44%
SE16	1	0.44%
SE18	1	0.44%
SE20	6	2.62%
SE21	1	0.44%
SE22	1	0.44%
SE23	7	3.06%
SE24	1	0.44%
SE25	3	1.31%
SE26	7	3.06%
SE27	1	0.44%

BR1	33	14.41%
BR2	8	3.49%
BR3	68	29.69%
BR4	5	2.18%
BR5	2	0.87%
BR6	2	0.87%
BR7	1	0.44%
BR8	1	0.44%
W1	1	0.44%
NW1	1	0.44%
N11	1	0.44%
N14	1	0.44%
N17	1	0.44%
SW4	1	0.44%
SW12	1	0.44%
WC2E	1	0.44%
TN4	1	0.44%
TN10	1	0.44%
CR0	3	1.31%
CR2	1	0.44%
CR4	1	0.44%
ME7	1	0.44%
ME10	1	0.44%
SM1	1	0.44%
CI2	1	0.44%
PR12	1	0.44%
DA15	1	0.44%



PUBLIC QUESTION NO. 40

Priority 3

LONDON BOROUGH OF LEWISHAM

COUNCIL MEETING

18 JULY 2018

Question asked by: Mr Richardson

Member to reply: The Mayor

Question

I did hear it on 'The Grapevine' that our new directly elected Mayor is to decide on Policy Matters by means of sharing with Cabinet Members the details of matters requiring decisions before conclusions are made.

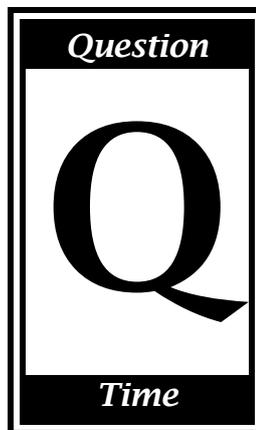
Is this an attempt to Bring Back Democracy to Lewisham residents, rather than continue with the Autocratic Rule of the previous Administration?

Is this method of decision making within the remit of a Directly Elected Mayoral system?

Reply

I have implemented a new collective approach to decision-making in accordance with the provisions of the Local Government Act 2000. By delegating executive decision-making to meetings of Mayor and Cabinet, I have given more involvement and ownership in decisions to members of my Cabinet. Meetings of Mayor & Cabinet are open to the public to attend.

The Council will shortly be launching a Local Democracy Review which will make recommendations about how the Council could enhance openness and transparency, further develop public involvement in Council decisions and promote effective decision-making.



PUBLIC QUESTION NO. 41

Priority 4

LONDON BOROUGH OF LEWISHAM

COUNCIL MEETING

18 JULY 2018

Question asked by: Carole Hope

Member to reply: Councillor McGeevor

Question

In view of the fact that a small team of officers and other selected individuals invited to four forums are responsible for making decisions about major changes to the usage of Beckenham Place Park, please advise whether, in the interests of openness and transparency, the council will publish the minutes of the four forums on the website and also why the Friends of Beckenham Place Park have been refused representation on the main Steering Group?

Reply

The Council has created four forums for current and potential park users to contribute towards improvements and activities in the park. They are:

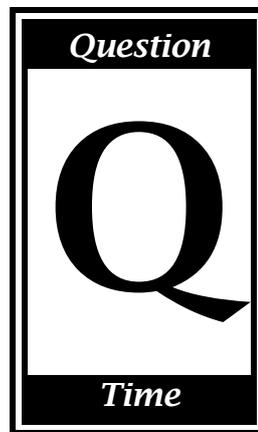
- Nature, history and interpretation
- Active
- Children young people and schools
- Arts and events

The forums are designed to give those who want to volunteer their time to develop elements of the park's offer under these broad headings a space where they can put forward and develop ideas for future implementation.

The forums are not responsible for making decisions about major changes in the usage of the park. Any such proposals would at the least have to be agreed by the Head of Greenscene (the Council's Parks Department).

The Friends of Beckenham Place Park take part in the forum meetings and have access to the minutes of the meetings. We would have no objection if they chose to publish them on their website, but we think they are of limited interest to the public so we do not intend to publish them ourselves.

The Friends of Beckenham Place Park are not represented on project's steering group because this is made up of key partners from a professional sphere including councillors, officers and partner organisations.



PUBLIC QUESTION NO. 42

Priority 4

LONDON BOROUGH OF LEWISHAM

COUNCIL MEETING

18 JULY 2018

Question asked by: David Da Silva Pereira

Member to reply: Councillors McGeevor

Question

What is the Council going to do about the fly tipping in Evelyn Ward?

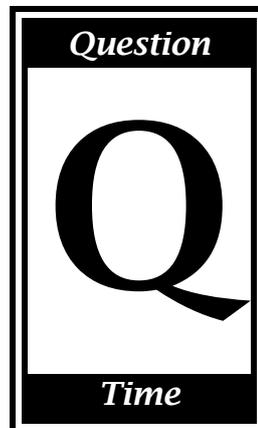
Reply

Answer is as per PQ34.

The Council continues to take fly-tipping very seriously and investigates a substantial amount of incidents every month. The Council is deploying CCTV cameras at fly-tipping hotspots borough wide and has invested in three new high spec Automatic Number Plate Recognition High Definition cameras during the past 12 months at a significant cost.

Borough wide (including Evelyn & New Cross Wards) the Council's Clean Streets (Enforcement) Team take a zero tolerance approach to fly-tipping issuing on the spot fines to those fly-tipping and to those not maintaining waste disposal documents. In Evelyn & New Cross 68 Fixed Penalty Notices have been issued for waste offences in the past 12 months. We continue to issue £400 fly-tipping Fixed Penalties and have doubled the litter penalty from £75 to £150 earlier this year.

We are also in the process of looking at whether joint up working with the London Borough of Southwark may be necessary to resolve issues in the Evelyn area on the Lewisham/Southwark boundary.



PUBLIC QUESTION NO. 43

Priority 4

LONDON BOROUGH OF LEWISHAM

COUNCIL MEETING

18 JULY 2018

Question asked by: Mrs Richardson

Member to reply: Councillor Slater

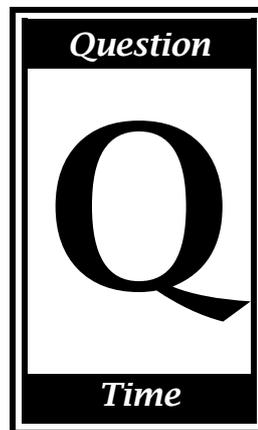
Question

Adult Education (ALL) in Lewisham seems to be reducing certain classes to be available at one centre only (Brockley Rise), in the borough. In particular this may affect exercise, movement, dance - all of which are valuable to maintain good health, especially for the older residents. The borough stretches from Forest Hill to Lee and from Deptford Strand to Grove Park. In spite of financial constraints and sometimes the inability to attract students, how does Lewisham Council propose that such activities could be more widely accessible? The previous Mayor conducted a Poverty Commission for the borough and I understand 25% of the population is under 19 and of those 30% live in poverty, 25% of the pensioners in the borough live in poverty. Will this have any impact on the provision of Adult/Community Education for Lewisham's residents?

Reply

Lewisham Council remains committed to the value of adult learning and its positive impact on Lewisham's communities and residents. Resources are limited, but there remain three adult learning centres across the borough, each with its own specialist rooms. It is important that we run classes in the most appropriate settings, and currently Brockley Rise is the only adult learning centre with a hall suitable for movement/dance/exercise. However, recent research has shown that an adult learning class in general (not only physical exercise classes) has a positive impact on health and wellbeing, particular for older learners. So attending a class in any of the three centres will help enable older residents to maintain good health, and we would like to continue to promote that message.

Lewisham Council also remains committed to reducing poverty across the borough, and to understanding the role that adult learning has to take in helping to do this. With that in mind Adult Learning Lewisham has been taking part in research to understand the learning and work travel patterns in areas of high deprivation in the borough, which shall be used to plan adult education provision in future.



PUBLIC QUESTION NO. 44

Priority 4

LONDON BOROUGH OF LEWISHAM

COUNCIL MEETING

18 JULY 2018

Question asked by: Mr Williams

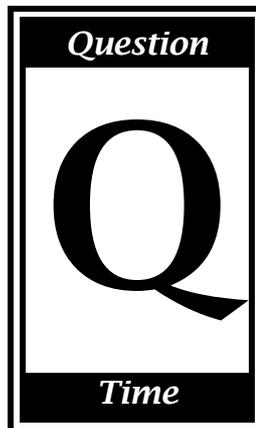
Member to reply: Cllr Bell

Question

During the recent heatwave the local community in Evelyn Ward has had to do the work of Lewisham Homes and turn out to water young, recently-planted trees along Rainsborough Avenue SE8. Will the Mayor ensure that Lewisham Homes recognises its responsibility to these trees in future, ensuring that local environmental assets are maintained?

Reply

The land in question is owned by the Council. The landscaping referred to was paid for & carried out in connection with an adjoining private residential development scheme. The trees were not planted by Lewisham Homes therefore I have asked officers from the Councils Open Space Management team to inspect the site, assess the condition of the trees and arrange for any necessary maintenance.



PUBLIC QUESTION NO. 45

Priority 4

LONDON BOROUGH OF LEWISHAM

COUNCIL MEETING

18 JULY 2018

Question asked by: Rosalind Huish

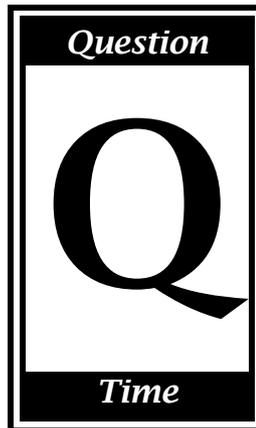
Member to reply: Cllr McGeevor

Question

Has an air impact assessment been carried out at Beckenham Place Park since the felling of trees?

Reply

Air quality impact assessments (AQIA) may sometimes be required to support planning applications where there are significant concerns that the new development will generate pollution, such as gas emissions, particulates etc. The restoration of the park is not likely to cause any such issues and therefore no air quality impact assessment (AQIA) has been carried out for the restoration of Beckenham Place Park.



PUBLIC QUESTION NO. 46

Priority 4

LONDON BOROUGH OF LEWISHAM

COUNCIL MEETING

18 JULY 2018

Question asked by: Andy Tonge

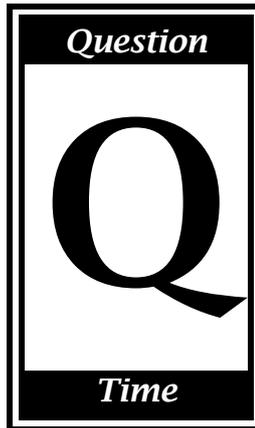
Member to reply: Cllr McGeevor

Question

Paragraph 9.2 of the Beckenham Place Park landscape tender Jan 2018 said “Please detail other projects that you have been involved in within the last three years which have involved works of a similar nature and budget, particularly those in public parks. You must demonstrate your experience/ your sub contractor’s experience of creating lakes or water features, as this is a key part of the landscape works. You should describe at least 2 highly relevant case studies and not more than 4.” Please advise the experience of id Verde in creating lakes

Reply

Idverde are the lead landscape contractor for this project and their team includes a specialist sub-contractor Miles Water Engineering Ltd who will deliver the lake restoration. MWE have a strong track record of delivering projects of this nature including the enlargement and reshaping of the lake in Burgess Park, Southwark. They were also responsible for restoration and creation of significant water features and earthworks at Boughton House one of the most important 18th Century designed landscapes in England. Their website <http://www.miles-water.com> shows further examples from an extensive portfolio work.



PUBLIC QUESTION NO. 47

Priority 5

LONDON BOROUGH OF LEWISHAM

COUNCIL MEETING

18 JULY 2018

Question asked by: David Da Silva Pereira

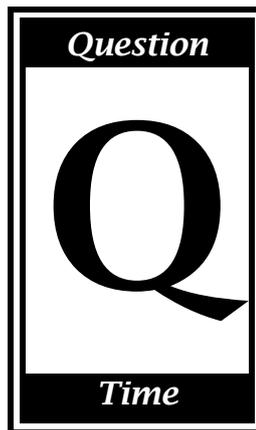
Member to reply: Councillor McGeevor

Question

What is Network Rail's plans for the Arches on Silwood Street?

Reply

Lewisham and Southwark are currently working on a joint feasibility study with Network Rail looking at the future role of land around Bermondsey Dive Under which includes the Silwood Rail Arches. At present this is at an early stage in development. This study will look at viable, safe and secure uses, appropriate for the area. The Council is otherwise not aware of any long term aspirations of Network Rail.



PUBLIC QUESTION NO. 48

Priority 5

LONDON BOROUGH OF LEWISHAM

COUNCIL MEETING

18 JULY 2018

Question asked by: Rosalind Huish

Member to reply: Cllr McGeevor

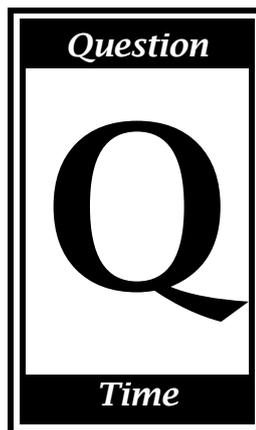
Question

Will there be any water quality and water safety policies that will be in place ahead of wild Swimming at Beckenham Place Park?

Reply

Water quality in the lake will be tested at regular intervals. We expect that it may take a little time after completion for the aquatic plants to develop sufficiently to achieve optimum water quality. The plants will remove nutrients from the water and this will prevent algae from growing in warm conditions.

Water safety policies will be developed before swimming or other any use is permitted. Safety notices and buoyancy aids will also be provided.



PUBLIC QUESTION NO. 49

Priority 6

LONDON BOROUGH OF LEWISHAM

COUNCIL MEETING

18 JULY 2018

Question asked by: David Da Silva Pereira

Member to reply: Councillor McGeevor

Question

What is the Council going to do about residents on Silwood Estate who reserve parking places for themselves by placing wheelie bins in the bay outside their house?

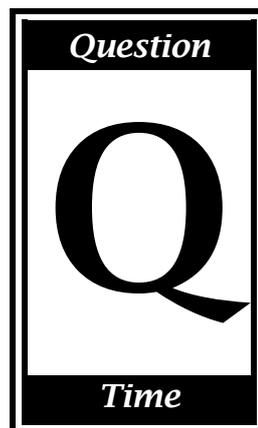
Reply

The roads on the Silwood Estate have been adopted by Lewisham/Southwark Council.

At present there are no parking restrictions on the Silwood Estate. Lewisham Council do not enforce on the Silwood Estate, other than on double yellow lines.

L&Q, who manage parts of the Silwood Estate do not police the parking areas, as they are adopted highways.

However, where the alleged parties are L&Q residents, L&Q have informed the council that they can enforce the terms of the tenancy stating that residents should not cause a nuisance and that all residents have the right to enjoy their home. Residents will be informed of the breach via letter and will be followed up with a site visit if this reoccurs. Persistent L&Q residents will be passed over to the internal Case Management Team, to individually manage the issue going forward.



PUBLIC QUESTION NO 50.

Priority 6

LONDON BOROUGH OF LEWISHAM

COUNCIL MEETING

18 JULY 2018

Question asked by: Rosalind Huish

Member to reply: Councillor Barnham

Question

How will you practically prevent Lewisham schools becoming academies and how will you market Lewisham secondary schools to parents given 40% choose to go out of borough at the moment?

Reply

We are committed to supporting and improving the Lewisham family of schools, opposing all forms of selection and providing the knowledge and support to parents, teachers and governors who are fighting academisation in their schools.

Local authorities and local communities have little say over whether a school becomes an academy. This trend has continued since 2010 as a result of policy and legislation of central government – both Conservative-controlled and during the Liberal Democrat-Conservative coalition.

We believe that the best way of maintaining the existing Lewisham family of schools is by ensuring that all of our schools provide a good education. As well as being good for Lewisham children, if we ensure that no Lewisham schools are judged to be inadequate by Ofsted – which I am pleased to note is currently the case – we avoid those schools receiving an academy order. We do this through using our 'School Improvement Framework' which aims to 'catch schools before they fall'. We want to ensure that being part of Lewisham is as attractive as possible through good quality support services and a supportive school improvement offer through Lewisham Learning, our school-led school improvement partnership.

I recognise that parents and local communities are not always aware of the achievements and success of our schools and the young people in them. We are therefore supporting secondary schools in improving their marketing strategies and improving public understanding of the many positives and good news stories about all our schools.

Agenda Item 5

COUNCIL		
Report Title	Member Questions	
Key Decision		Item No.6
Ward		
Contributors	Chief Executive (Head of Business & Committee)	
Class	Part 1	Date: July 18 2018

7. Questions from Members of the Council

Section C, paragraph 14 of the Constitution, provides for questions relevant to the general work or procedure of the Council to be asked by Members of the Council. Copies of the questions received and the replies to them will be circulated at the meeting.

LONDON BOROUGH OF LEWISHAM

COUNCIL MEETING

18 JULY 2018

Question by Councillor Hall
of the Mayor

Question

What progress has the Mayor made with the full implementation and assessing the implications of the Aarhus Convention? Will the Mayor give a commitment that the Council will fully comply with the "three pillars"?

Reply

The Government is responsible for undertaking the legislative, regulatory and other measures required to implement the Aarhus Convention and for reporting on their practical implementation. The Council will comply with all UK legislation relevant to the Convention, its principles and the 'three pillars'. It is recognised that local authority initiatives contribute to demonstrating practical implementation of the Convention and the Council will also, within the constraints of pressures on resources and where it is appropriate to do so, seek to enable Lewisham residents to influence environmental issues and the local environment through the delivery of services and the Council structures and policies.

LONDON BOROUGH OF LEWISHAM

COUNCIL MEETING

18 JULY 2018

Question by Councillor Rathbone
of the Cabinet Member for Community Sector

Question

Will the new mayoral administration commit to supporting charitable, community and voluntary organisations in the same, or similar basis as the previous administration?

Reply

Lewisham was the first London Borough to develop a compact with the third sector in 2001. The compact seeks to support a positive relationship between the sector and key statutory partners. It includes expectations around the management of grant aid as well as broader partnership working principles. The compact was further developed in 2010 with the addition of guidelines for commissioning with the third sector in recognition of the important contribution that the third sector should play in identifying needs as well as potentially delivering service solutions. The Council also recognises the importance of the sector with a specific Cabinet Member for the Community Sector.

Since May 2010 the Council has had to cut over £165 million from its budget. This reflects the impact of public sector austerity. The scale of change means that government funding for local authorities will have been reduced by 63% over the decade from 2010 to 2020. At the same time as managing these reductions, Lewisham has been faced with growth and pressures from taking on additional devolved responsibilities, a growing population, and general inflation. Both of these pressures – funding reductions and rising cost of services – are expected to continue into the 2020s.

Lewisham Council anticipates needing to make a further £30 million reduction to its controllable budget over the next two years. For this reason the council has been undertaking a fundamental review of all its budgets including that for the main grants programme but this work will not conclude until later in 2018.

Notwithstanding the above, and despite the fact that the third sectors role within the commissioning of local public services has grown, the council recognises that there continues to be a need for grant aid investment for the following reasons:

- A recognition of the importance of maintaining an independent sector that can act as a critical friend to challenge public sector policy and delivery.
- A recognition of the key role that the sector plays in building civic participation, providing a voice for seldom heard residents and providing community intelligence.
- A recognition of the great diversity of the sector and the need to engage with small and emerging groups as well as large established organisations.
- A recognition of the sector's potential to take risks and innovate which does not sit easily within commissioning frameworks.
- A recognition that third sector organisations have been key delivery partners within Lewisham, including for a wide range of targeted short term initiatives. Grant aid provides a level of security for organisations ensuring that there is a strong sector able to address local need, attract additional resources and be ready to work in partnership with us.
- A recognition that grant aid allows the sector to demonstrate the borough's endorsement of their work to other funders.

As such we will shortly be releasing a consultation to seek the views of residents and the sector regarding priorities and our proposed approach with a view to this informing our approach once overall budgets are decided.

LONDON BOROUGH OF LEWISHAM

COUNCIL MEETING

18 JULY 2018

Question by Councillor Hordijenko
of the Cabinet Member for Parks, Neighbourhoods and Transport

Question

Please could you provide an update on the ownership of Elm Lane Sports Ground and its associated buildings and any plans there are in the pipeline for the ground?

Reply

Elm Lane Playing Fields and the associated pavilion are a Council asset that falls within the Children and Young People directorate portfolio. It is currently managed by the Estate and Contracts Management team within Regeneration and Place.

The playing fields are used by schools during the week and for community based football at weekends. The pavilion houses the associated changing facilities, along with a local boxing club. There is also some additional under-utilised space that has in the past been used as a nursery.

The current plans are for the site to continue to be used for school and community sport, and we are exploring the potential for new nursery provision within the pavilion as well.

LONDON BOROUGH OF LEWISHAM

COUNCIL MEETING

18 JULY 2018

Question by Councillor Curran
of the Mayor

Question

Given local concerns about non-adherence to planning conditions related to the construction of the new buildings at Our Lady and St Philip Neri Primary School in Sydenham, can the cabinet member advise what is being done to ensure that the planning permission is being adhered to?

Reply

Planning department and Children and Young People directorate officers are involved in ongoing dialogue regarding a remedy for the current situation. It is anticipated that a planning application will be submitted in due course, in order to regularise / address the situation.

At this stage it is not possible to confirm exactly what form of development will ultimately be within that planning application, as the matter remains under discussion.

The planning application that will be the output of those discussions will then be the subject to the normal public consultation and decision making processes, where all parties will be able to give their views, and given the level of interest in the development, a decision is likely to be made by a Planning Committee.

LONDON BOROUGH OF LEWISHAM

COUNCIL MEETING

18 JULY 2018

Question by Councillor Copley
of the Mayor

Question

In light of SGN giving notice of its intention to demolish the historic Bell Green gas holders by using a planning loophole, will you give consideration to issuing an Article 4 Direction to remove permitted development rights from locally listed buildings in Lewisham?

Reply

The Prior Notification by SGN has understandably raised strong feelings by members of the public and elected members of the Council. I personally regret the decision by SGN to demolish the Bell Green gas holders, however unlike a normal planning application, failure to determine the Prior Notification within the six week statutory period would have meant the gas holders could have been removed without any further controls being imposed by the Council. In these circumstances it was not possible to delay a determination beyond the six week period in order to consider an Article 4 Direction in this case.

If an Article 4 Direction had been imposed with immediate effect, this would have exposed the Council to the potential for a substantial claim for compensation from the owners of the site for reduction in land value as a result of the impact of the Article 4 Direction.

I have written to SGN to see what can be done to safeguard the gas holders as part of any forthcoming planning application.

In addition I will ensure that the Council looks at the future use of Article 4 Directions on Locally Listed Buildings outside Conservation Areas as part of the Heritage Strategy and Action Plan currently being prepared.

LONDON BOROUGH OF LEWISHAM

COUNCIL MEETING

18 JULY 2018

Question by Councillor Hall
of the Mayor

Question

Will the Mayor join me in supporting safe standing at football grounds?

Reply

There has been a government announcement to carry out analysis of evidence relating to the all-seater policy. This will be commissioned by the Department for Digital, Culture, Media and Sport. The all-seater policy has been in place for 25 years. The Sports Grounds Safety Authority (SGSA) is keen to see an evidence based approach to ensure any changes to policy are carefully considered with spectator safety as a priority.

I will review the findings of this analysis and ensure that the Council, as a regulator of safe standing, considers the latest safety and technical advice on this important issue.

LONDON BOROUGH OF LEWISHAM

COUNCIL MEETING

18 JULY 2018

Question by Councillor Curran
of the Mayor

Question

Please advise how policy is applied to enforce planning conditions and how is the policy applied if they are broken?

Reply

Planning decisions are made primarily on the basis of planning policy as set out within the Development Plan (the London Plan and Lewisham's own Core Strategy / Local Plan). This policy is applied in the same way to prospective and retrospective development proposals. The consideration of enforcement action is nuanced however, by a further consideration as to whether enforcement action is 'expedient' having regard to the development plan and all other material considerations.

National Planning Policy Guidance provides the following explanation of enforcement powers and considerations:

<https://www.gov.uk/guidance/ensuring-effective-enforcement>

The Council's agreed approach to unauthorised development is explained on the following webpage:

<https://www.lewisham.gov.uk/myservices/planning/Unauthorised-development/Pages/Case-priorities.aspx>

LONDON BOROUGH OF LEWISHAM

COUNCIL MEETING

18 JULY 2018

Question by Councillor Copley
of the Cabinet Member for Housing

Question

How many new council homes have been:

- a) granted planning permission;
- b) started;
- c) completed

In the London Borough of Lewisham since May 2014?

Reply

Since 2014, the New Homes Better Places Programme was implemented with a view to building the first Council homes in Lewisham in a generation. By the end of the last administration we delivered on our commitment to get 500 units into Planning. The full breakdown is as follows:

Project Status	Number of New Council Homes
Planning Submission	0
Awaiting Planning Consent	213
Awaiting Start-On-Site	85
On Site	112
Completed Schemes	91
Total	501

Addressing London's housing crisis is crucial a key priority and we will now be seeking to deliver 1,000 new social homes for help meet the needs of our residents.

LONDON BOROUGH OF LEWISHAM

COUNCIL MEETING

18 JULY 2018

Question by Councillor John Paschoud
of the Cabinet Member for School Performance

Question

What curriculum support for specific subjects do we provide or facilitate for schools in Lewisham?

What are the possible subject gaps, at primary and secondary levels, that the Cabinet Member can identify, where (in particular smaller) schools may benefit from collective availability of resources, expertise or specialist equipment?

How does what we provide as a LA compare, in different subjects, with the offering from other LAs responsible for school performance?

What does the CM think we could do in this respect to support and improve the achievements of children in our schools?

Reply

There is no doubt that schools need access to high quality and current subject support. They may need different support at different times depending on their need and improvement priorities. Currently we hold subject leader meetings for secondary school subject leaders. These meet at least termly. From September 2018 these will be coordinated by the ATLAS teaching school.

Subject expertise is a key part of Lewisham Secondary Challenge – our programme to support our secondary schools in their drive to improve standards. This is funded by £750k in DfE grant, and forms a part of the wider Lewisham Learning partnership. This is a school-led school improvement partnership, supporting all Lewisham schools which has begun its work over the last year, with a strong focus on English and Maths. I very much hope that we will see some early fruits of this approach soon.

The next step is developing ‘subject hubs’ – schools which are centres of excellence for subjects. These will serve primary and secondary subject teachers/leads. This

approach is working well in a number of other boroughs' school-led school Improvement partnerships. It enables the sharing of good practice and (for relatively modest funding) ensuring that there is up to date subject expertise in the borough. This is a sustainable model.

Although there is a London network of heads of school improvement, there is not London-wide information on the extent to which councils have retained subject specific expertise. In general LAs have reduced their school improvement teams, including the subject specific support that was provided in the past because of reductions in government funding and in particular the abolition of the Education Services Grant. School-led improvement approaches like Lewisham Learning are stepping into this gap and are increasingly recognised in educational research as a successful model, recognising that the most up to date and innovative subject expertise is in schools.

LONDON BOROUGH OF LEWISHAM

COUNCIL MEETING

18 JULY 2018

Question by Councillor Curran
of the Cabinet Member for Parks, Neighbourhood and Transport

Question

Will the Cabinet member advise if TfL could be prevailed upon to ensure that all the traffic lights, including pedestrian crossings, are synchronised to ensure the minimisation of traffic queues?

Reply

TfL operate and maintain all the traffic signals in the Borough. In high priority areas, TfL operate an enhanced system which synchronises and optimises signals within a defined area. This system, called SCOOT (Split Cycle Offset Optimisation Technique), involves a significant upfront cost as well as ongoing management, however there are tangible benefits to the efficient flow of traffic through a given area. The Council has lobbied for the roll-out of this system across the Borough, and Lewisham Town Centre has recently been included in the system. The Council will continue to press TfL on this important issue.

LONDON BOROUGH OF LEWISHAM

COUNCIL MEETING

18 JULY 2018

Question by Councillor Curran
of the Mayor

Question

Will the Council review the decision to exclude the curtilage and stable block of The Baring Hall Hotel from its renewal of Asset of Community Value status due to it being based on incorrect information?

Reply

The decision to list the Baring Hall Hotel as an Asset of Community Value was based on the evidence submitted with the application, supplementary evidence that was provided following a request for clarification from the applicant and a site visit to view the asset. The full decision notice is attached below.

My understanding is that the legislation does not allow for an appeals process for the nominating body for applications for Assets of Community Value. The Council can only review decisions within the parameters of the legislation.

The Baring Hall Hotel, 368 Baring Road, Grove Park, London, SE12 0DU
Application from The Baring Trust dated 12th January 2018

I have reviewed all paperwork received as part of the application, including the additional evidence and information requested on 28 February 2018 and received on 8th March 2018.

The legislation provides that an asset satisfies the definition of an asset of community value if:

- the local authority decides that the actual main, current use of the building or land is to further the social wellbeing or social interests of the local community and it is realistic to think that there can continue to be a main use of the building or land which will further the social wellbeing or social interests of the local community; or
- in the opinion of the local authority there is a time in the recent past when the actual and main use of the building or land furthered the social wellbeing or social interests of the local community and, it is realistic to think that there is a time in the next five years when there could be a main use of the building or land that would further the social wellbeing or social interests of the local community.

The Baring Hall Hotel is currently in use as a public house, the first limb of the above test therefore applies to the Baring Hall Hotel.

The Baring Hall Hotel was originally added to the register of Assets of Community Value in January 2013 but this listing expired after 5 years and therefore this application is to renew the listing. At the time of the initial listing the Baring Hall Hotel had been disused following a fire in August 2009 that had forced the public house to close. The application focussed around plans for how the asset could be returned to community use including a public house as well as opening a traditional craft and building skills education centre. Five years later some of these plans have come to fruition but others have failed to be realised.

The 2018 application to nominate the Baring Hall Hotel as an asset of community value included information about use of the asset to further the social wellbeing and/or social interests of the local community in particular:

- The pub has hosted live music, comedy and quiz nights
- The pub is used by local community groups for informal meetings
- Baring Hall Hotel is the only pub and social gathering space in the centre of Grove Park
- There are plans by Grove Park Community Association to develop a heritage trail and literary cycling trail that will feature Baring Hall Hotel.

From looking at the pub's website it is clear that there are:

- Weekly live music events
- Weekly pub quiz
- Two areas of the pub for hire for events

Twenty six individuals and the local MP wrote in support of the application.

The application was not just for the pub building but included the land adjacent to the pub and the stables block. Although there was reference made in the application about the potential future use of the land in relation to proposals being developed for the Grove Park Neighbourhood Plan (which is at pre-submission draft stage), there was only one example given of the land being used to further social value and this was a 2016 Queen's birthday celebration. Photos of a small marquee next to the picnic tables were submitted. Further evidence of the social value of the land and stables block was requested on 28 February 2018. A response was received on 8 March 2018 which referred to the need to retain the land as potential car-park to ensure the continued viability of the public house but did not provide any further examples of actual or previous activity that furthered the social wellbeing or social interests of the local community. A site visit was conducted and it was observed that the land was dominated by abandoned vehicles and a disused fish stall. The area closest to the rear of the public house had rows of picnic tables which were clearly ancillary to the pub but the rest of the land appeared anti-social with litter, rubble and discarded vehicles. There was no evidence that the majority of the land was serving as ancillary space to the public house and the only exception to this was the area of picnic tables.

The evidence provided demonstrates that the main Baring Hall Hotel building has a community value over and above its intrinsic value as a Public House. Information was also provided about the heritage value of the asset including its local listing and information about the history of the site.

Baring Hall Hotel is in a prominent location opposite Grove Park Station with good transport links. The evidence supplied suggests that it has a range of activities in addition to the sale of alcohol to attract customers and add to its financial viability.

However, there was insufficient evidence to demonstrate the land adjacent to the Baring Hall Hotel building (with the exception of the area of picnic tables) furthers the social wellbeing and social interests of the local community. In fact, in its current state it appears to be anti-social. The area to be included on the register is marked on the attached plan and includes the main public house building and an area of ancillary land currently used for picnic tables.

On the basis of the evidence and information supplied as part of the application, I am satisfied that:

- i) the actual and main use of The Baring Hall Hotel namely use as a public house with additional community facilities, furthers the social wellbeing or social interests of the local community and
- ii) it is realistic to think that there can continue to be a main use of the building or land which will further the social wellbeing or social interests of the local community

Accordingly, my decision is that The Baring Hall Hotel should be included in the Council's list of assets of community value.

LONDON BOROUGH OF LEWISHAM

COUNCIL MEETING

18 JULY 2018

Question by Councillor Curran
of the Mayor

Question

Will the Cabinet member institute a formal policy and process for the renewal of listings of Assets of Community Value as there was not one in place in January 2018?

Reply

The legislation requires all listings to be automatically removed after 5 years. Relisting requires a new application and cannot be done automatically as it needs to take into account any change of circumstances. Also the application must come from an eligible body. Given that the process for renewing a listing is the same as making an initial application there is no need for a separate formal policy and process.

The council website includes the following information in the Q&As for Assets of Community Value:

If an asset is listed, how long does the listing last for?

The asset will remain on the list for 5 years, after which it will be removed. However, it can then be re-nominated to go back on the list. An asset can also be removed if, at any time, the local authority no longer considers it to be of community value. Notice of removal is required to be given to the owner, occupant and the community nominee who originally nominated the asset to go on the list.

Agenda Item 6

COUNCIL		
Report Title	Announcements or Communications	
Key Decision		Item No.
Ward	n/a	
Contributors	Chief Executive	
Class	Part 1	Date: July 18 2018

Recommendation

The Council is invited to receive any announcements or communications from the Mayor or the Chief Executive.

1. Report of the Returning Officer

The Chair of Council will report that at a by-election held on June 14 for the Lewisham East Parliamentary Constituency, Whitefoot Ward Councillor Janet Daby, the Labour Party Candidate, was elected to succeed Heidi Alexander who has become a Deputy Mayor for London.

2. Win Hardy RIP

Win Hardy, a former Mayoress of Lewisham died in June at the age of 92. She was Mayoress to her husband Stan Hardy in the 1974-75 municipal year. Stan Hardy was a Bellingham Ward Councillor and Win still resided in the Ward. Her funeral took place on June 25 at Hither Green Crematorium.

3. Queen's Birthday Honours

The Council is asked to congratulate the following persons with Lewisham connections who received awards in the latest Queen's Birthday Honours.

Janet Vitmayer, recently retired Chief Executive of the Horniman Museum in Forest Hill who was a CBE has now become a DBE.

Veronica Jobbins has been awarded an MBE for services to young people. Veronica is the dance learning and dance participation director for Trinity Laban and has done all of the partnership work between Laban and the Council for many years. '

4. Deputy Lieutenant

The Council is asked to note that Lewisham's Representative Deputy Lieutenant, Colonel Jane Davis, has been promoted to be the Vice Lord Lieutenant of Greater London. So, she will no longer be Lewisham's Deputy Lieutenant. She has held this role in Lewisham for just over 10 years and during that time has worked hard to develop our links with the military establishments and personnel as well as the various cadet organisations based in the borough.

The Council (the Mayor and the former Mayor) made a presentation to Jane at her final duty as the borough's Deputy Lieutenant, at last month's Armed Forces day, an event arranged by the Council. Taking her place as Lewisham's new DL is former Mayor Sir Steve Bullock.

5. Past badges of office

It is common practice to recognise the people who have held civic office to have a miniature badge of the Council's coat of arms presented to them, to express the gratitude of the Council. The replica badges recognise the commitment of their roles undertaking civic engagements on behalf of the London Borough of Lewisham.

The immediate former Chair and consort are asked to come up to receive their badges from the Mayor/Chair.

6. Councillor Sophie Davis

1 Summary

This report seeks the Council's approval of the reason for non-attendance of Councillor Sophie Davis at Council meetings.

2 Purpose of this report

To approve the reason for Councillor Davis's non-attendance at Council meetings

3 Recommendation

The Council is recommended to approve the reason for Councillor Sophie Davis's non-attendance at Council meetings since 23/5/18, as set out in this report.

4 Background

4.1 Councillor Davis's last attendance at a Council meeting was at the Overview and Scrutiny Committee on 23 May 2018. She is currently in an advanced state of pregnancy with a due date of 20 July.

4.2 Section 85(1) Local Government Act 1972 states that if a member of a local authority fails, throughout a period of six consecutive months from the date of his/her last attendance, to attend any meeting of the authority, then unless the failure was due to a reason approved by the authority before the expiry of that period, they cease to be a member.

4.3 If the Council approves the reason for the non-attendance as proposed, Councillor Davis will not cease to be a member on expiry of her 6 months absence. Were the Council not to approve the reason for absence, a vacancy would arise on expiry of the six month period of absence.

5 Legal implications

These are set out in the body of the report

6 Financial implications

There are no financial implications

7 Conclusion

Council is asked to approve the reason for Councillor Davis's absence as set out in this report.

7. London Youth Games - Team Lewisham

The Council is asked to note that in the finals of the London Youth Games Lewisham won the accolade of Most Improved Borough.

Agenda Item 7

COUNCIL		
Report Title	Gypsy and Traveller Site(s) Local Plan: Consultation on Preferred Site	
Key Decision	Yes	Item No.
Ward	All	
Contributors	Executive Director for Resources and Regeneration and Executive Director for Customer Services	
Class	Part 1	Date: 18 July 2018

1. Purpose

- 1.1 This report seeks the Council's formal resolution to agree public consultation on Pool Court as the preferred location for a residential traveller site.

2. Summary

- 2.1 The Planning Service is undertaking a third round of public consultation on the production of a Gypsy and Traveller Site(s) Local Plan. The first round of consultation on draft Search Parameters and Site Selection Criteria and associated Sustainability Appraisal Scoping Report took place in March and April 2016. The second round of consultation on a Potential Site(s) Report identifying two alternative potential traveller sites and associated Integrated Impact Assessment took place in October and November 2016. The timing for the third round of public consultation, in line with the council's Local Development Scheme is anticipated to take place 3rd quarter of 2018.
- 2.2 At its meeting on 15 March 2018, the Mayor and Cabinet (a) noted the contents of the Consultation Statement into the Potential Sites Report and associated Integrated Impact Assessment, (b) approved the Pool Court site as the preferred location for a residential traveller site, (c) approved for public consultation the GTSLP Preferred Site Consultation Report (March 2018) and Integrated Impact Assessment (March 2018), (d) instructed officers to seek the acquisition of the eastern land parcel from Network Rail, (e) noted the assistance that the Council could give to the existing business to help it relocate to a suitable alternative site and (f) requested that Full Council approve the documents specified in (c) for public consultation.
- 2.3 As part of the development plan process the Lewisham constitution requires the consultation documents to be approved by Full Council.

3. Recommendations

- 3.1 The Council formally resolve to agree public consultation on the GTSLP Preferred Site Consultation Report (Appendix 1) and Integrated Impact Assessment (March 2018) (Appendix 2).

4. Policy Context

- 4.1 The contents of this report are consistent with the Council's policy framework. When the GTSLP is adopted it will become part of Lewisham's 'development plan' and will form part of the Council's policy framework.

5. Background

- 5.1 The full background, policy context and details of the Gypsy and Traveller Site(s) Local Plan Preferred Site Consultation Report is set out in the Part 1 report to Mayor and Cabinet dated 15th March 2018 which is included as Appendix 3 and may be viewed at:

<http://councilmeetings.lewisham.gov.uk/ieListDocuments.aspx?CId=139&MId=4996>

- 5.2 The Council is required under planning legislation to produce, adopt and keep up to date a Local Plan for the borough. The process for adopting a local plan are set out in legislation and Government guidance. The formal process requires early consultation with the public and other stakeholders on the main issues to be considered as part of the Local Plan. This first round of public consultation will be met by consultation on the document set out as appendix 1 to this report.

6. The Gypsy and Traveller Site(s) Local Plan – Preferred Site

- 6.1 The Preferred Site Consultation Report is set out as Appendix 1 to this report. The document is structured as follows:
- 'Tell us what you think' - details of consultation process;
 - Introduction;
 - How the GTSLP will fit in with Lewisham's planning framework;
 - How the GTSLP has been prepared;
 - Site allocation – addressing the 'what, where, when and how' questions);
 - Design guidelines and planning application requirements;
 - Infrastructure;
 - Delivery and monitoring; and
 - Changes to existing allocations.
- 6.2 Some minor changes have been made to the Consultation Report since consideration by the Mayor and Cabinet to remove errors and improve clarity. These changes comprise clarifying the purpose of the consultation in the newly titled 'How do I comment' section, incorporating a more up-to-date diagram of the proposed Lewisham planning framework (Figure 1), correcting references to the Site Selection Background Paper (March 2018) and correcting paragraph numbers.

- 6.3 It is also proposed to consult on the Integrated Impact Assessment into the Preferred Site and this document is set out as Appendix 2 to this report. This document provides a report of the Sustainability Appraisal, Strategic Environmental Assessment and Equalities Analysis Assessment of the Lewisham GTSLP. The purpose of the Integrated Impact Assessment is to promote sustainable development through the integration of social, environmental and economic considerations into the preparation of policy.

7. Legal Implications

- 7.1 The Town and Country Planning (Local Planning) (England) Regulations 2012 (as amended) sets out the main steps in the procedure for the production and adoption of planning documents, as explained in the report.
- 7.2 This report seeks approval to consult on the Council's proposed GTSLP Preferred Site Consultation Report and associated Integrated Impact Assessment.

8. Financial Implications

- 8.1 There are no direct financial implications arising from this report. The cost of the consultation will be delivered from within the existing Planning Service budget.

9. Crime and Disorder Implications

- 9.1 There are no direct implications relating to crime and disorder issues.

10. Equalities Implications

- 10.1 The Council's Comprehensive Equality Scheme for 2012-16 provides an overarching framework and focus for the Council's work on equalities and helps ensure compliance with the Equality Act 2010. The proposals set out in this report accord with the Council's Comprehensive Equalities Scheme; particularly as they relating to: 'increasing participation and engagement'.
- 10.2 The Integrated Impact Assessment (IIA) (August 2016) includes an equalities appraisal to identify equalities impacts and implications of emerging policy options. This assessed both potential sites and was consulted on alongside the Potential Sites Consultation Report. The updated IIA (March 2018) includes an updated equalities appraisal.

11. Environmental Implications

- 11.1 There are no direct environmental impacts arising from this report.

12. Conclusion

- 12.1 The Council is asked to resolve to agree public consultation on the GTSLP Preferred Site Consultation Report (Appendix 1) and Integrated Impact Assessment (March 2018) (Appendix 2).

13. Background documents and originator

Short Title Document	Date	File Location	File Reference	Contact Officer	Exempt
Planning & Compulsory Purchase Act 2004	2004	Laurence House	Planning Policy	David Syme	No
Localism Act 2011	2011	Laurence House	Planning Policy	David Syme	No
National Planning Policy Framework (NPPF) 2012	2012	Laurence House	Planning Policy	David Syme	No
Town and Country Planning (Local Planning) (England) Regulations 2012 (as amended)	2012	Laurence House	Planning Policy	David Syme	No
Planning policy for traveller sites 2015	2015	Laurence House	Planning Policy	David Syme	No

If you have any queries on this report, please contact David Syme, Strategic Planning Manager, 3rd floor Laurence House, 1 Catford Road, Catford SE6 4RU – telephone 020 8314 7186.



Gypsy and Traveller Site(s) Local Plan

Preferred Site: Pool Court

Regulation 18 (Stage 3) Consultation Report

REVISED DRAFT

Copy for public consultation
TBC 2018

1. Introduction	4
2. How the GTSLP will fit in with Lewisham’s planning framework	5
3. How the GTSLP has been prepared	5
4. Site Allocation	13
5. General Design Guidelines and Planning Application Requirements	19
6. Infrastructure	19
7. Delivery and Monitoring	20
8. Changes to existing allocations	20
Appendix 1: Approved Search Parameters and Site Selection Criteria	

How do I comment?

The Council is inviting comments on the Gypsy and Traveller Site(s) Local Plan Preferred Site Consultation Report (DATE) as part of a formal public consultation. It is important that we get your comments and suggestions about the preferred residential traveller site at Pool Court.

This consultation runs for 6 weeks from DATE to DATE.

You can respond in the following ways:

- **On-line:** https://lewisham-consult.objective.co.uk/portal/planning_policy
- **E-mail:** planning.policy@lewisham.gov.uk
- **Post:** Planning Policy, London Borough of Lewisham, 3rd Floor, Laurence House, 1 Catford Road, SE6 4RU

You can also respond by completing a questionnaire which can be filled out:

- On-line https://lewisham-consult.objective.co.uk/portal/planning_policy

Or the questionnaire can be downloaded from our website:

- At www.lewisham.gov.uk/myservices/planning/policy/Pages/default.aspx

Copies of the document can be viewed on:

- the Council's website
www.lewisham.gov.uk/myservices/planning/policy/Pages/default.aspx
- inspected at all borough libraries and Council's Access Point, Ground Floor, Laurence House, Catford, SE6 4RU
- obtained by contacting the Planning Policy Team on 020 8314 7400 who will also be happy to answer any questions you may have.

To be considered, your comments must include your name and an email or postal address. We want to foster good relationships between all our communities and we will not consider any consultation responses that include prejudicial or discriminatory comments or language.

1. Introduction

The Gypsy and Traveller Site(s) Local Plan

1.1. The Housing and Planning Act (2016) includes a duty (under Section 8 of the 1985 Housing Act) for local authorities to consider the needs of "people residing in or resorting to their district with respect to the provision of sites on which caravans can be stationed."

1.2. The Gypsy and Traveller Site(s) Local Plan (GTSLP) will form part of Lewisham's development plan and will identify and designate land in the borough to accommodate the identified need for gypsy and travellers, as defined in the National Planning Policy for Traveller Sites (August 2015).

1.3. Unless otherwise specified, "the Council" means the Council acting in its capacity as the Local Planning Authority.

Background

1.4. Following the closure in 2009 of a former site in Thurston Road, next to Lewisham Station, Lewisham does not have any existing sites for the gypsy and traveller community.

1.5. The Council did grant planning permission in 2008 for five pitches on a site in Church Grove, Ladywell. However, this permission was not acted upon, the planning permission has lapsed and this site is currently being developed for 'bricks and mortar' housing.

1.6. The Council adopted its Core Strategy in June 2011. Core Strategy Policy 2 identified criteria for selecting sites and envisaged that site(s) would be identified through a Sites Allocation DPD. However, it did not prove possible to include a site or sites in the Council's Site Allocations Local Plan (SALP) when this was developed and adopted in June 2013. At the Examination in to the SALP, the Council confirmed its intention to bring forward a separate GTSLP by May 2014.

1.7. The Council began preparing a GTSLP in March 2013. However, other priorities meant that things did not progress as planned and preparation on the Local Plan halted.

1.8. The Council commissioned a Gypsy and Traveller Accommodation Assessment (published in June 2015) and began preparing a GTSLP again in January 2016. The 2015 Accommodation Assessment was updated in August 2016.

1.9. Full details of the Council's site selection process are set out in the Site Selection Background Paper (March 2018). In summary, it consulted on and then approved Search Parameters and Site Selection Criteria. It then established a list of appropriate Council assets that met the approved Search Parameters and applied Site Selection Criterion 1 (Effective and efficient use of public assets) to this list and included one privately owned site to arrive at a long list of six sites. The remaining Site Selection Criteria were applied to these sites to arrive at two potential sites: Land at Pool Court (SE6) and New Cross Social Club and adjoining land (SE15). The Council consulted on two potential sites and an Integrated Impact Assessment during a six-week period in October and November 2016. Following careful consideration of issues raised and further investigations in to both sites and the findings of an updated Integrated Impact Assessment, in March 2018, the Council's Mayor and Cabinet approved Pool Court as the preferred site.

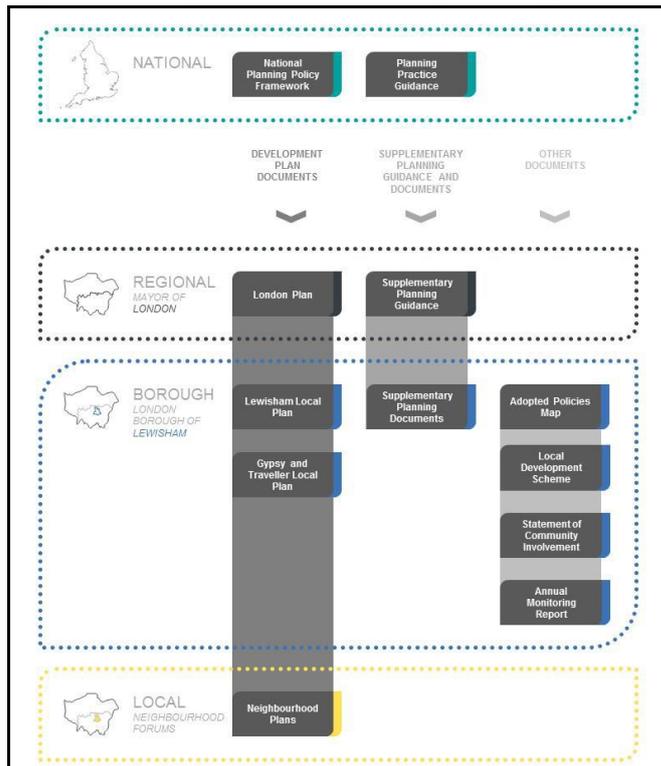
1.10. In parallel with developing a GTSLP, the Council (as Housing Authority) is developing a Gypsy and Traveller Pitch Allocation Scheme to, amongst other things, establish a fair, transparent and equitable system for the allocation of pitches on a Council managed site(s). This is to be the subject of separate consultation in due course.

2. How the GTSLP will fit in with Lewisham's planning framework

2.1. Lewisham’s existing planning framework comprises the adopted Core Strategy, Site Allocations Local Plan, Lewisham Town Centre Local Plan (February 2014) and Development Management Local Plan (November 2014) and supporting Supplementary Planning Documents.

2.2. The Council is in the process of preparing a new Lewisham Local Plan which will eventually replace the existing Core Strategy, Site Allocations and Development Management Local Plans. Figure 1 below shows how a GTSLP will fit in with Lewisham’ planning framework.

Figure 1: Proposed Lewisham planning framework



3. How the GTSLP has been prepared

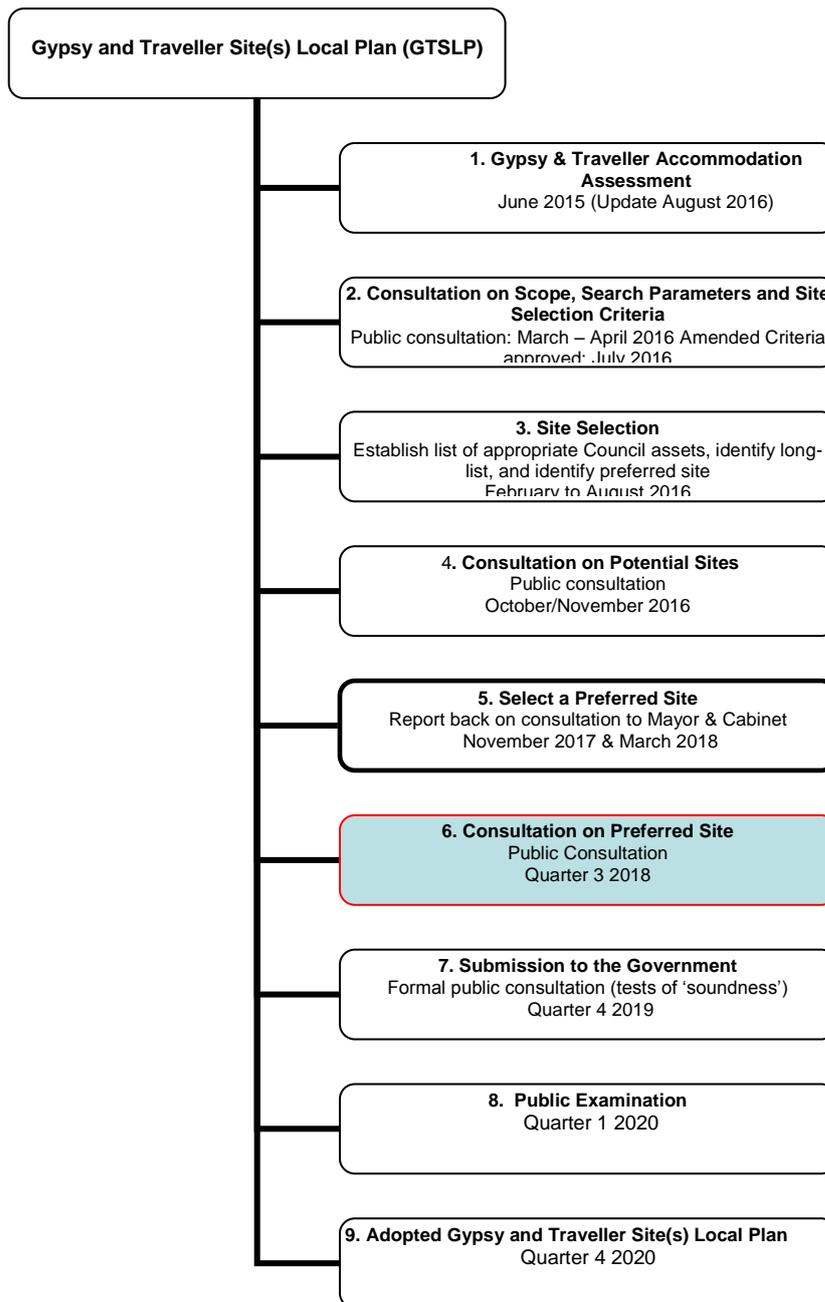
Regulations

3.1. The process for preparing Local Plans, including the GTSLP, is set out in the Town and Country Planning (Local Planning) (England) Regulations 2012, as amended.

Overall Process

3.2. The key stages in the preparation of the Plan are summarised in Figure 2 below. We are currently at Stage 6.

Figure 2: Key stages in preparing a GTSLP



Founding principles

3.3. The Plan has been founded on the following:

National and local policies, including:

- The National Planning Policy Framework (2012);
- The Government's Planning Policy for Traveller Sites (2015);
- National Planning Practice Guidance;
- The London Plan (2016);
- Lewisham's Core Strategy; and
- Other key relevant plans, policies and strategies.

Appropriate and proportionate Evidence base:

- Lewisham Gypsy and Traveller Needs Assessment (June 2015) as updated (July August 2016); and
- Other key relevant evidence, referred to below.

Findings of the Integrated Impact Assessment:

- Sustainability Appraisal (incorporating the requirements of Strategic Environmental Assessment) of the objectives, strategy and preferred site allocation to highlight potential conflicts or areas where there could be improvements and to ensure that the Plan accords with the principles of sustainable development.
- Equalities Analysis Assessment - an appraisal to identify equalities impacts and implications of emerging policy options.

Involvement of key stakeholders:

- Consultation on Scope, Search Parameters and Site Selection Criteria and Sustainability Appraisal Scoping Report;
- Consultation with officers across the Council, Lewisham Clinical Commissioning Group and the Metropolitan Police;
- Co-operation with other public bodies; and
- Consultation on two potential sites (Pool Court and New Cross); and
- Consultation on the preferred site – Pool Court.

National and local policies

National policy and guidance

3.4. The National Planning Policy Framework (NPPF) (March 2012) sets out the Government's planning policies for England. At the heart of the NPPF is a presumption in favour of sustainable development, which for plan-making means that:

- Local planning authorities should positively seek opportunities to meet the development needs of their area; and
- Local Plans should meet objectively assessed needs, with sufficient flexibility to adapt to rapid change, unless (i) any adverse impacts of doing so would significantly and demonstrably outweigh the benefits; or (ii) specific NPPF policies indicate development should be restricted.

3.5 The NPPF is augmented by the National Planning Policy for Traveller Sites (PPTS) (August 2015). This sets out the Government's overarching aim as being to ensure fair and equal treatment for travellers, in a way that facilitates the traditional and nomadic way of life of travellers while respecting the interests of the settled community.

London Plan

3.6. The London Plan consolidated with alterations since 2011 was published in March 2016. Policy 3.8 (Housing choice) calls on boroughs to work with the Mayor of London and local communities to identify the range of needs likely to arise within their areas and to ensure (amongst other things) that the accommodation requirements of gypsies and travellers are identified in line with national policy, in coordination with neighbouring boroughs and districts as appropriate. In December 2017 the Mayor of London published a draft replacement London Plan. Draft Policy H16 (Gypsy and Traveller accommodation) calls on boroughs to plan to meet the identified need for permanent Gypsy and Traveller pitches, using an inclusive definition of 'Gypsies and Travellers' and assessing need accordingly.

Lewisham Core Strategy

3.7. The Core Strategy was adopted in June 2011. Core Strategy Policy 2 (Gypsies and travellers) is set out in full below.

1. The Council will continue to assess and provide for the identified needs of gypsies and travellers in appropriate locations. The Council is in the process of identifying a suitable site to meet the immediate need arising from the redevelopment of the Thurston Road site, which forms part of the approved Lewisham Gateway development. A site will be identified through the Site Allocations DPD.

2. Proposals for additional and alternative gypsy and traveller sites will be assessed having regard to the following criteria:

- (a) They have reasonable access to local shops, services and community facilities in particular schools and health services.*
- (b) They are safe and have reasonably convenient access to the road network.*
- (c) They have provision for parking, turning, service and emergency vehicles.*
- (d) Any business activities do not have unacceptable adverse impacts on the safety and amenity of occupants and their children and neighbouring residents particularly in terms of noise and overlooking, and other disturbance from the movement of vehicles to and from the site.*
- (e) They have a supply of essential services such as water, sewerage and drainage and waste disposal.*
- (f) They are designed and landscaped to a high standard which facilitates the integration of the site with the surrounding environment and amenity of the occupiers adjoining the site*

Other key relevant strategies/plans

3.8 The key relevant strategies/plans that have informed the preparation of the GTSLP include:

- Lewisham Sustainable Community Strategy 2008-2020;
- LB Lewisham’s Strategic Asset Management Plan (SAMP) 2015-2020; and
- Lewisham River Corridor Improvement Plan SPD 2015.

Evidence base

Gypsy and Traveller Accommodation Assessment

3.9. The Planning Policy for Travellers Sites makes clear that in producing their Local Plans, local planning authorities should, amongst other things:

- Identify and update annually, a supply of specific ‘deliverable’ sites sufficient to provide 5 years’ worth of sites against their locally set targets; and
- Identify a supply of specific, ‘developable’ sites, or broad locations for growth, for years 6 to 10 and, where possible, for years 11-15.

3.10. The Accommodation Assessment (as updated in August 2016) found the need of the households in Lewisham that meet the new definition are for an additional 6 pitches. This is made up of three existing adult households and accounting for three new households, usually formed by adult children setting up their own households.

Figure 3: Additional need for ‘travelling’ households by 5-year periods

Years	0-5	6-10	11-15	
	2016-21	2021-26	2026-31	Total
Lewisham Travelling	3	2	1	6

Other key relevant evidence:

3.11. The other key relevant evidence that has informed the preparation of the Plan includes:

- Lewisham Infrastructure Delivery Plan (2010) – under review with an IDP Framework Document being prepared in October 2015;
- Strategic Flood Risk Assessment Update 2015;
- London Gypsy & Traveller Sites Working Paper on Net Density and Gypsy and Traveller Sites (July 2009);
- Highway and Access Feasibility Report August 2016 (updated October 2016);
- Flood Smart Pro and Sequential Testing Report 06/08/2016 (updated 12/12/2016);
- Indicative Masterplan and Capacity Studies (June 2016 and March 2018) and
- Site Selection Background Paper (March 2018).

Findings of the Integrated Impact Appraisal

3.12. The Integrated Impact Assessment (updated March 2018) finds that the provision of gypsy and traveller pitches at Pool Court could have a negative effect on landscape, biodiversity, flora and fauna through the loss of open space. It also identifies ways of mitigating these potential effects, which are incorporated in to the proposed revised Design Guidelines (Section 6).

Involvement of key stakeholders

Consultation on Scope, Search Parameters and Site Selection Criteria

3.13. Consultation on the intention to prepare a Local Plan, its proposed scope and proposed Search Parameters and Site Selection Criteria (in accordance with Regulation 18) was undertaken in March and April 2016. Consultation on a Sustainability Appraisal Scoping report took place at the same time.

3.14. Consultation was in accordance with the minimum requirements of the relevant Regulations and the Council's adopted Statement of Community Involvement and included:

- Public display of documents;
- Documents published on the Council website and Consultation Portal;
- Press Notice;
- Mail out to prescribed and non-statutory bodies;
- Liaison with neighbouring boroughs; and
- Meetings with the Lewisham Gypsy and Traveller Forum and London Gypsy and Traveller Unit.

3.15. Following consultation, in July 2016 the Council's Mayor and Cabinet, and in September 2016 the Full Council, approved the final Search Parameters and Site Selection Criteria. Comments received on the Sustainability Appraisal Scoping Report have also been taken in to account in developing the appraisal.

Assessment of potential sites

3.16. Officers across the Council (including School Places, Environmental Protection, Public Health and Housing), Lewisham Clinical Commissioning Group (CCG) and the Metropolitan Police were consulted on a list of potential sites. The Council also commissioned studies to assess the suitability of these sites in terms of vehicular access and movement, flood risk and masterplan and capacity.

3.17. In October and November 2016, the Council undertook 6-week public consultation programme to engage with a range of stakeholders on two alternative potential sites: New Cross Social Club and adjoining land in Hornshay Street (SE15) and Land at Pool Court (SE6). The Consultation Statement (October 2017) sets out the comments that were received and provides a detailed summary of the main issues, including officer responses to them.

Duty to Co-operate

3.18. The Localism Act (2011) introduced a Duty to Co-operate which requires planning authorities and other public bodies to actively engage and work jointly on strategic matters. The PPTS encourages LPAs to consider production of joint development plans that set targets on a cross-authority basis, to provide more flexibility in identifying sites, particularly if they have special or strict planning constraints across its area.

3.19. The South-East London Planning Authorities (Lewisham, Bexley, Bromley, Greenwich and Southwark) hold quarterly meetings to facilitate joint working on strategic matters. The boroughs have been progressing traveller pitch provision through different development plan documents which are at different stages in plan preparation, and have therefore not prepared a joint, sub-regional document to assess need or allocate site(s) for gypsy and traveller accommodation. However, there is cross borough working with regard to the various assessments and a number of the boroughs, which are commissioning external assessments, are using the same contractor.

3.20. The boroughs have previously considered their joint approach to bricks and mortar housing through the joint production of a South-East London Strategic Housing Market Assessment (2014) (SHMA) which looks at housing need across the sub-region and provides an evidence base to inform plan making. This is to ensure conformity with the London Plan. This sub-regional work is on-going and arrangements are in place to consider all housing issues at future South-East London Planning Authorities Duty to Cooperate meetings.

4. Site Allocation

Introduction

4.1. Government guidance is that where sites are proposed for allocation, sufficient detail should be given to provide clarity to developers, local communities and other interested parties about the nature and scale of development (addressing the 'what, where, when and how' questions).

4.2. Please note that the proposed site is slightly different to that which was set out in the Potential Sites Consultation Report (October 2016). The western

and northern site boundaries have been rationalised to reflect land ownership boundaries and remove the sliver of land next to the river.

What

4.3. Taking account of site characteristics and the Masterplan and Capacity Studies (June 2017 and March 2018), the Council considers that the proposed site is capable of accommodating the 6 pitches that are estimated to be needed in Lewisham up to 2031.

4.4. In common with 'bricks and mortar' housing, the Council is keen to optimise the actual number of pitches that are provided on a chosen site. The proposed site is expected to accommodate pitches of varying sizes to meet the needs of those households that have the greatest housing need and are top of the Council's waiting list for pitches. Pitches are likely to include a hardstanding area for a static caravan, touring caravan and parking space. Pitches are also expected to include a single-storey amenity building and some landscaping/open space. It is hoped that there would also be an area of communal play/open meeting space on the site.

Where

4.5. The Pool Court site comprises three parcels of land along Pool Court, which together amount to about 0.32ha.

4.6. The western part of the site comprises vacant open land and a small area of public highway. The vacant land is owned by the Council and the area of public highway is owned by London and Quadrant Housing Association. The vacant land is currently fenced off and inaccessible and forms part of the designated Site of Importance for Nature Conservation (SINC), called Pool River Linear Park. The western boundary of this part of the site is formed by a surface level railway and the northern boundary is formed by the Ravensbourne River, which is in a deep concrete channel at this point.

4.7. The eastern part of the site comprises an operational scaffolding yard that is accessed from Fordmill Road and open land leading up to the River. The eastern boundary is formed by a railway embankment, which also forms part of the Site of Importance for Nature Conservation.



When

4.8. The Needs Assessment (as updated in August 2016) found that the minimum need for 6 pitches arises from people currently living in bricks and mortar homes, teenage children and household formation – with 3 pitches needed immediately (2016-21), 2 further pitches needed between 2021 and 2026 and 1 more needed between 2026 and 2031.

4.9. However, for practical and financial reasons, the Council expects to deliver all of the optimum number of pitches on the Pool Court site in one

go and will allocate them according to its emerging Traveller Pitch Allocation Scheme.

How

4.10. The allocation of the Pool Court site for use as a gypsy and traveller site in a GTSLP provides a presumption in favour of the principle of this use and effectively safeguards the land for this purpose. However, full planning permission for the development and detailed design of the site will be required in the normal way.

4.11. The law requires that, to the extent that development plan policies are material to an application, the decision on planning applications must be taken in accordance with the development plan unless there are material considerations that indicate otherwise. Core Strategy Policy 2 (see Section 3.7) sets out criteria for assessing proposals for gypsy and traveller sites and these will form the basis for determining future planning applications. There are also a number of relevant policies in the Council's Development Management Local Plan (November 2014).

4.12. The Council welcomes pre-application discussions over the design and management of the site so that it can help shape proposals to ensure that they meet the needs of the gypsy and traveller community, represent high quality design, safeguard existing residential amenity and respect the environment. The Council will also want to ensure any planning permission is subject to appropriate planning conditions and that, together with necessary environmental permits and licensing arrangements, these effectively manage the use and operation of the site

4.13. The Council is expected to be the applicant and as such, any planning application will need to be dealt with in accordance with Regulation 3 of the Town and Country Planning General Regulations 1992 – which, in summary, means that no officer or councillor that has a role in asset management can have any role in assessing or determining the planning application.

4.14. The Council is expected to be responsible for managing the site, either directly or indirectly via a third party and appropriate management arrangements will be put in place in due course.

5. Design Guidelines and Planning Application Requirements

Design Guidelines

5.1. A number of the guidelines set out below have been amended to take account of comments made in response to the Potential Sites Consultation Report (October 2016) and to mitigate potential negative effects identified in the IIA (March 2018).

5.2. Applicants are encouraged to engage fully with the gypsy and traveller community, seek expert advice and draw on good practice from across London to ensure that the site:

- Meets the needs of the gypsy and traveller community;
- Is of a high-quality design;
- Safeguards existing residential amenity; and
- Respects the environment.

5.3. Whilst formally withdrawn in October 2015 following the publication of the National Planning Policy for Travellers, there is a lot of good general design guidance in the Department of Communities and Local Government's 'Good Practice Guide' (published in 2008). In the absence of any replacement guidance, reference should be made to this in the detailed design of a site and its individual pitches.

5.4. The following site-specific guidance should be taken fully in to account:

(a) Vehicular access to and from the site should be solely from the Fordmill Road frontage. There could be a pedestrian access to and from Pool Court.

(b) The boundary treatment and access/exit along the Fordmill Road should be designed to provide a safe and welcoming entrance to the site, protect the privacy of residents living on the site and provide an attractive street frontage (including some visual interaction between the street and the site).

(c) The boundary treatment to the Pool Court road frontage and car parking area should safeguard the existing trees that are just outside of the site and safeguard the amenity of existing residents.

(d) All works carried out within 8m of the Pool River will require an environmental permit from the Environment Agency. Earth works, landscaping and other development in this part of the site should be designed and managed to enhance this part of the River and take account of guidance in the River Corridor Improvement Plan SPD (September 2015).

(e) Pitches, car parking and hard-standing areas which could be used for storage purposes should be located away from the western edge of the site (which is most susceptible to fluvial flooding). There may be a need for like-for-like level compensation works if ground level raising is required on parts of the site.

(f) Sustainable Urban Drainage (SUDS) including green roofs on permanent buildings and devices to control rates of water discharge in to the River to green field run off rates should be incorporated where possible

(g) As many existing trees and as much mature vegetation as possible should be retained and incorporated in to the landscape design and additional tree planting should be incorporated where possible along the boundaries with Pool Court.

(h) Detailed designs should where practicable and viable make provision for new habitat by incorporating living roofs/walls on permanent buildings and making provision for native or wildlife species of trees and shrubs, nesting boxes for birds/bats/insects and stag beetle log piles.

(i) Any on-site external lighting should be carefully designed and specified so as not to cause disturbance to nearby residents or harm the biodiversity value of the site or adjoining land.

(j) Caravans are generally not well insulated against noise and the layout, orientation and design of pitches and associated structures should take account of the surface level railway along the western edge of the site. A solid fence/wall of appropriate mass/sound reduction qualities should also be installed along the western boundary.

Planning Application Requirements

5.5. A full planning application should include the following:

- Existing and proposed site levels;
- General site arrangement plan;
- Hard and soft landscaping drawings (including full details of road ways, paths, hardstanding areas, tree and other soft landscaping, Sustainable Urban Drainage features and boundary treatments, including between pitches);
- Floor plans, sections and elevations of permanent buildings;
- Full details of refuse collection and postal delivery arrangements;
- Full details of treatment of external boundaries;
- Full details of all external lighting;
- Flood Risk Assessment and Drainage Strategy (including a Flood Evacuation Plan);
- Transport Statement;
- Design and Access Statement; and
- Site Management Plan.

6. Infrastructure

6.1. The Council published an Infrastructure Delivery Plan (IDP) in August 2010. It has prepared an IDP Framework Document in (October 2015) and this is being used to prepare a revised IDP to support the delivery of the emerging Lewisham Local Plan and the GTSLP.

6.2. The relatively small number of households that are expected to live on a chosen site are unlikely to give rise to the need for additional infrastructure. Nevertheless, members of the gypsy and traveller community face particular challenges in accessing health, education and other services. The Council's School Places Manager and Lewisham Clinical Commissioning Group will continue to be involved once a site is selected and delivered, to help ensure that necessary adjustments to local service provision are made to cater for the particular needs of people living on the site.

7. Delivery and monitoring

7.1. The Council as developer is encouraged to offer assistance to the existing tenant (RHS Scaffolding) to move to a suitable alternative site

7.2. The Council as developer is encouraged to develop ongoing engagement between the traveller and general community. This could include liaison meetings between local residents and members of the Lewisham traveller community, facilitated by the Council and the Lewisham Traveller Outreach Worker, to build understanding and community cohesion during the detailed design and planning stages.

7.3. The delivery of an allocated site is addressed in Section 5 above, under the 'How' heading. In the event that an allocated site should fail to deliver the number of pitches needed, Core Strategy Policy 2 (Gypsy and travellers) makes provision for any unmet need to be met through the planning application process only, stating as it does that:

"2. Proposals for additional and alternative gypsy and traveller sites will be assessed having regard to the following criteria" (Listed in Section 3.7 above):

7.4. The monitoring framework in the Core Strategy sets out indicators and targets for each of its strategic objectives. For Objectives 02 (Housing provision and distribution) and 03 (Local housing need), the following are identified in relation to Core Strategy Policy 2 (Gypsies and travellers):

- Indicators – Net additional pitches (gypsy and travellers); and
- Target – Net additional pitches.

7.5. The Council will be monitoring the delivery of pitches using the above indicator and target, or any relevant replacement ones that may be identified as part of preparing a unified Local Plan and will use its Annual Monitoring Report (AMR) to record progress.

8. Changes to existing allocations

8.1. The Council proposes to de-allocate those parts of the Site of Importance for Nature Conservation called Pool River Linear Park.

INTEGRATED IMPACT ASSESSMENT

Gypsy and Traveller Site(s) Local Plan

Pro Vision

March 2018

Prepared on behalf of: The London Borough of Lewisham



GYPSY AND TRAVELLER SITE(S) LOCAL PLAN
SUSTAINABILITY APPRAISAL
PROJECT NO. 1403

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Appendices

Appendix A: Plans, policies and programmes

Appendix B: Baseline information

Appendix C: Sustainability objectives, indicators, targets and monitoring

Non-technical summary

This document provides a report of the Sustainability Appraisal, Strategic Environmental Assessment and Equalities Analysis Assessment of the Lewisham Gypsy and Traveller Site(s) Local Plan. The purpose of the Integrated Impact Assessment is to promote sustainable development through the integration of social, environmental and economic considerations into the preparation of the Lewisham Gypsy and Traveller Site(s) Local Plan.

This report has been prepared considering the consultation responses to a Scoping Report which has determined the principal matters to be addressed by the Integrated Impact Assessment and comments received on the IIA (August 2016). The scoping process identified the following sustainability issues.

1. To provide sufficient housing and the opportunity to live in a decent home
2. To improve the health of the population
3. To reduce poverty and social exclusion
4. To improve accessibility to leisure facilities, community infrastructure and key local services
5. To reduce crime, antisocial behaviour and the fear of crime
6. To reduce car travel and improve accessibility by sustainable modes of transport
7. To mitigate and adapt to the impact of climate change
8. To improve air quality and water quality, manage water resources and reduce noise and vibration
9. To increase, maintain and enhance open space, biodiversity, flora and fauna
10. To mitigate flood risk
11. To maintain and enhance landscapes and townscapes
12. To conserve and where appropriate enhance the historic environment
13. To minimise the production of waste and increase waste recovery and recycling
14. To encourage sustained economic growth
15. To promote access to employment, education, skills and training

The Integrated Impact Assessment incorporates the requirements of the European Strategic Environmental Assessment Directive (2001/42/EC), which states that a formal assessment should be undertaken of plans and programmes that are likely to have significant effects on the environment. The Integrated Impact Assessment has been prepared taking into account the Council's obligations in relation to the Equalities Act 2010 and the Council's equalities objectives.

The Integrated Impact Assessment process is designed to ensure that planning decisions are made that accord with the principles of sustainable development. The timing of the Integrated Impact Assessment, from the initial stages of the plan-making process, aims to make sure that sustainability considerations are taken into account early in the formulation of policy documents, including the Lewisham Gypsy and Traveller Site(s) Local Plan.

The Integrated Impact Assessment starts with an evaluation of the existing situation and then assesses how the Lewisham Gypsy and Traveller Site(s) Local Plan would affect each aspect of sustainability identified through the scoping process. Impacts are positive, neutral, negative or uncertain.

The two alternative potential sites considered for the 6 pitches required in the London Borough of Lewisham were New Cross Social Club and the adjoining land, and Land at Pool Court. Land at Pool Court is the London Borough of Lewisham Officer's preferred site and the proposed site allocation within the Lewisham Gypsy and Traveller Site(s) Local Plan.

The provision of gypsy and traveller pitches at New Cross Social Club site could have a detrimental effect on health, social inclusion and accessibility to community infrastructure through the loss of a social club and, potentially, games area space. The provision of gypsy and traveller pitches at Pool Court could have a negative effect on landscape, biodiversity, flora and fauna through the loss of open space.

Proposals for monitoring, to identify significant sustainability effects of implementing the Lewisham Gypsy and Traveller Site(s) Local Plan so that remedial action can be taken if required, are set out in this report.

1.0 Introduction

- 1.1 Pro Vision have been instructed by the London Borough of Lewisham to prepare an Integrated Impact Assessment, incorporating a Sustainability Appraisal, Strategic Environmental Assessment and Equalities Analysis Assessment, of the Lewisham Gypsy and Traveller Site(s) Local Plan.
- 1.2 SAs are intended to support the selection of options in the preparation of plans and to provide a mechanism for reviewing alternative options whilst assessing how the plan will contribute to the achievement of sustainable development. This IIA seeks to identify the economic, social and environmental impacts of the potential sites presented in the Lewisham Gypsy and Traveller Site(s) Local Plan. It includes discussion of the likely significant sustainability effects of its implementation and recommendations are made relating to the ways in which potential adverse effects can be reduced or beneficial effects can be enhanced. The report includes proposals for relevant environmental, social and economic indicators to monitor the effects of the implementation of the Lewisham Gypsy and Traveller Site(s) Local Plan.
- 1.3 SAs must incorporate the requirements of the Strategic Environmental Assessment (SEA) Directive to ensure that the significant environmental effects arising from policies, plans and programmes are identified, assessed, mitigated, communicated to decision makers, monitored and that opportunities for public involvement are provided. The SEA Directive requires that a formal assessment is undertaken of plans and programmes which are likely to have significant effects on the environment.
- 1.4 The IIA considers the London Borough of Lewisham's obligations in relation to the Equalities Act 2010 and the Council's equalities objectives. The assessment has due regard to the need to eliminate unlawful discrimination, to advance equality of opportunity and to foster good relations.
- 1.5 Assessing policies from a sustainability perspective (including environmental, social and economic sustainability) alongside an equalities perspective will enable a holistic assessment of the alternative sites for gypsy and traveller accommodation. There are overlaps in the above assessments and therefore an approach that addresses the statutory requirements for Sustainability Appraisal, Strategic Environmental Assessment and Equalities Impact Assessment into a single integrated assessment will be used.
- 1.6 The Scoping Report, the initial stage of the IIA process, consisted of the collection of baseline data and information on other plans, policies and programmes that could influence the preparation of the Lewisham Gypsy and Traveller Site(s) Local Plan. The data collected was used to identify the key sustainability issues, objectives and targets at multiple spatial scales.
- 1.7 The Potential Site(s) Regulation 18 (stage 2) consultation is now complete. The Council proposes to consult on a Preferred Site Consultation Report and this IIA Report as part of a third stage Regulation 18 consultation. Once adopted the Local Plan will identify and designate land in the borough to accommodate the identified need for sites for Gypsies and Travellers.
- 1.8 Section 2 of this IIA Report provides a detailed description of the methodology for the IIA. The context, baseline and objectives of the IIA are set out in Section 3. The IIA is presented and the significant effects are discussed in Section 4. Measures for mitigation and monitoring are considered in Section 5.

2.0 Methodology

SUSTAINABILITY APPRAISAL

- 2.1 The purpose of the IIA is to promote sustainable development through the integration of social, environmental and economic considerations into the preparation of development plans. The UK Government Sustainable Development Strategy 2005 defines sustainable development as follows:
- Social progress which meets the needs of everyone;
 - Effective protection of the environment;
 - Prudent use of natural resources; and
 - Maintenance of high and stable levels of economic growth and employment.
- 2.2 The IIA of the Lewisham Gypsy and Traveller Site(s) Local Plan aims to ensure that the principles of sustainability are embedded into the plan-making process, forming an integral part of plan preparation. The IIA takes a long-term view, reflecting global, national, regional and local issues. The IIA identifies opportunities to enhance positive performance and to address negative impacts from an early stage in the process of policy formulation.
- 2.3 The stages which the IIA will follow are based on the Government's Planning Practice Guidance. The Town and Country Planning (Local Planning) (England) Regulations 2012 and the Environmental Assessment of Plans and Programmes Regulations 2004 have also been used to inform the stages followed. These stages are set out in Table 2.1 below. Stage A of the IIA process is covered within the IIA Scoping Report. This IIA Report documents stages B, C and D. Stage E will be completed following the adoption of the Lewisham Gypsy and Traveller Site(s) Local Plan.

Table 2.1: Stages of IIA

Gypsy and Traveller Site(s) Local Plan: Evidence Gathering and Engagement
<p>IIA Stages and Tasks</p> <p>Stage A: Setting the context and objectives, establishing the baseline and deciding on the scope</p> <p>1: Identify other relevant policies, plans and programmes, and sustainability objectives</p> <p>2: Collect baseline information</p> <p>3: Identify sustainability issues and problems</p> <p>4: Develop the IIA framework</p> <p>5: Consult the consultation bodies on the scope of the IIA Report</p>
Gypsy and Traveller Site(s) Local Plan: Consult on Local Plan in preparation Regulation 18 of the Town and Country Planning (Local Planning) (England) Regulations 2012
<p>IIA Stages and Tasks</p> <p>Stage B: Developing and refining alternatives and assessing effects</p> <p>1: Test the Local Plan objectives against the IIA framework</p> <p>2: Develop the Local Plan options including reasonable alternatives</p> <p>3. Evaluate the likely effects of the Local Plan and alternatives</p> <p>4: Consider ways of mitigating adverse effects and maximising beneficial effects</p> <p>5: Propose measures to monitor the significant effects of implementing the Local Plan</p>

Gypsy and Traveller Site(s) Local Plan: Prepare the publication version of the Local Plan
IIA Stages and Tasks Stage C: Prepare the IIA Report
Gypsy and Traveller Site(s) Local Plan: Seek representations on the publication Local Plan (Regulation 19) from consultation bodies and the public
IIA Stages and Tasks Stage D1: Seek representations on the sustainability appraisal report from consultation bodies and the public
Gypsy and Traveller Sites Local Plan: Submit draft Local Plan and supporting documents for independent examination Outcome of examination
IIA Stages and Tasks Stage D2: Consider implications of the outcome of the examination for IIA compliance
Gypsy and Traveller Sites Local Plan: Adoption and Monitoring
IIA Stages and Tasks Stage E: Post adoption reporting and monitoring 1: Prepare and publish post-adoption statement 2: Monitor significant effects of implementing the Local Plan 3: Respond to adverse effects

THE IIA PROCESS TO DATE

- 2.4 A Scoping Report was prepared by Pro Vision in January 2016, during the evidence gathering and engagement stage of the Lewisham Gypsy and Traveller Site(s) Local Plan. The Scoping Report identified the content and the level of detail of the information to be included in this IIA. The Scoping Report described the background and context, set out the relevant plans, policies and programmes, and established the baseline. This information was used to identify the sustainability requirements, issues and trends in the London Borough of Lewisham and to develop the IIA framework. Natural England, the Environment Agency, Historic England and the Greater London Authority were consulted on the scope of the IIA. Comments were received from Natural England, the Environment Agency and Historic England.
- 2.5 An IIA was completed of a Potential Site(s) Report prepared by the London Borough of Lewisham in August 2016. The IIA considered the comments received from Natural England, the Environment Agency and Historic England on the Scoping Report. Two potential residential traveller sites were identified in the Report, comprising New Cross Social Club and adjoining land, and Land at Pool Court. Statutory public consultation was completed on the Potential Site(s) Report and the August 2016 IIA between 17 October and 30 November 2016. Comments on the IIA were received from the following organisations and individuals. The relevant comments have been considered in the preparation of this IIA Report.
- Historic England;
 - Natural England;
 - Environment Agency;
 - Shontelle Williams Report;
 - Focus Group – 37 to 61 Pool Court;

- Focus Group – Lovelinch Close, New Cross;
 - Outreach Service for Gypsy and Roma Travellers;
 - London Gypsy and Traveller Unit;
 - Phoenix Housing;
 - Housing for Women;
 - London Borough of Lewisham, Director of Public Health;
 - Lewisham Police Partnership Team; and
 - Bellingham Community Project.
- 2.6 Since the publication of the Potential Site(s) Report, minor changes have been made to the boundary of Land at Pool Court, with the site now running parallel to the river, but excluding the river wall and a sliver of adjacent land.
- 2.7 In May 2017, Breeze Landscape Architects carried out a study into the possibility of re-providing a MUGA facility on the hardstanding area next to Upnall House – on the opposite side of Hornshay Street to New Cross Social Club – to replace (in part) the MUGA which would be lost if the proposals at New Cross Social Club and adjoining land are progressed. The study found that this area could accommodate one multi-use games area and a team area of approximately 407sqm or a multi-use games area and separate informal basketball practice area of approximately 323sqm.
- 2.8 BDP completed a masterplan and capacity study relating to each site in June 2017 and found that both sites are capable of accommodating at least 6 pitches. The study also suggests that it would be possible to provide 6 traveller pitches on the potential New Cross site whilst retaining the existing small kick-about area and informal basketball practice area. If this approach was taken and a replacement games area was also provided on the hardstanding next to Upnall House, then there would be no loss of facilities and a small net gain in space (approx. 760sqm as opposed to the existing 720sqm). The study also identifies an option of providing 6 traveller pitches and a replacement multi-use games area on the site of the existing Social Club car park that could possibly retain all facilities and avoid any net loss in space.
- 2.9 In November 2017, Lewisham's Mayor and Cabinet instructed officers to further investigate the following matters in relation to the potential Pool Court site: (i) the potential phased delivery of a traveller site, (ii) the incorporation of current public highway land in to a site and (ii) re-location assistance that could be offered to the existing scaffolding business. BDP carried out a further masterplan and capacity study (March 2018) which demonstrates that the site could be delivered in two phases. Notwithstanding the findings of the study, officers still consider that a combined site should be delivered at Pool Court delivering all six pitches in one phase, with vehicular access from Fordmill Road as indicated in the illustrative masterplan accompanying the Potential Sites Consultation Report (October 2016). It is not proposed to extend the site to include part of the Pool Court highway.

THE IIA APPROACH

Lewisham Local Plan Regulation 18 Consultation

- 2.10 The policies in the draft Local Plan have been assessed to identify the likely significant effects of the alternative sites (Stage B). Forecasting and evaluation of the significant effects has helped to develop and refine the proposals in the Lewisham Gypsy and Traveller Site(s) Local Plan.
- 2.11 Reasonable alternative sites were identified and considered at an early stage in the plan making process. The assessment of reasonable alternatives has informed the London Borough of Lewisham in choosing its preferred approach. Paragraph 152 of the National Planning Policy Framework was considered in the development of alternatives. Ways of mitigating any adverse effects, maximising beneficial effects and monitoring likely significant effects have been defined.

- 2.12 The IIA has compared the two potential sites for delivering the 6 pitches that Lewisham needs, and has assessed these against the baseline environmental, economic and social characteristics of the area and the likely situation if the Local Plan were not to be adopted.
- 2.13 The IIA has predicted and evaluated the effects of the two potential sites and has clearly identified the significant positive and negative effects of each alternative. The IIA has identified, described and evaluated the likely significant effects on environmental, economic and social factors using the evidence base. The determination of the likely significant effects on the environment is in line with the criteria set out in Schedule 1 to the Environmental Assessment of Plans and Programmes Regulations 2004.
- 2.14 The IIA has identified any likely significant adverse effects and measures envisaged to prevent, reduce and, as fully as possible, offset them. The IIA has considered all reasonable alternatives and has assessed the two potential sites against the same criteria. The officers' preferred site is then considered in more detail.
- 2.15 The IIA outlines the reasons the sites were selected, the reasons the rejected options were not taken forward and the reasons for selecting the preferred approach in light of the alternatives. The IIA provides conclusions on the overall sustainability of the potential sites. The assumptions used in assessing the significance of effects of the Local Plan are documented.
- 2.16 The development and appraisal of the proposals set out in the Lewisham Gypsy and Traveller Site(s) Local Plan is an iterative process. The proposals will be revised to take account of the appraisal findings. This will inform the selection, refinement and publication of the Local Plan.
- 2.17 The Council intends to consult relevant stakeholders, local residents / businesses and other consultees on a Preferred Site Consultation Report and this IAA Report as part of a third stage Regulation 18 consultation. The design guidelines in the Preferred Site Consultation Report take account of earlier consultation and the findings of an earlier version of the IIA report (October 2017).

Prepare the publication version of Lewisham Local Plan

- 2.18 Regulation 12 of the Environmental Assessment of Plans and Programmes Regulations 2004 sets out the formal requirements of an 'environmental report', which forms an integral part of the IIA report and is a core output of the SEA. An environmental report for the purpose of the regulations must identify, describe and evaluate the likely significant effects on the environment of implementing Lewisham Gypsy and Traveller Site(s) Local Plan policies and of the reasonable alternatives taking into account the objectives and geographical scope of the Lewisham Gypsy and Traveller Site(s) Local Plan.
- 2.19 This IIA report clearly shows how these requirements have been met, in addition to recording the wider assessment of social and economic effects. The IIA includes a non-technical summary of the information within the main report. The summary has been prepared with a range of readers in mind and provides a clear, accessible overview of the process and findings.

Seek representations on the publication Local Plan (regulation 19)

- 2.20 The consultation bodies, and other parties who are affected, or likely to be affected by, or have an interest in the decisions involved in the assessment and adoption of the Lewisham Gypsy and Traveller Site(s) Local Plan will continue to be consulted, in line with Regulation 13 of the Environmental Assessment of Plans and Programmes Regulations 2004. This IIA Report, including the non-technical summary, will be published alongside the Lewisham Gypsy and Traveller Site(s) Local Plan for a minimum of six weeks.
- 2.21 This IIA Report will not necessarily have to be amended if the Lewisham Gypsy and Traveller Site(s) Local Plan is modified following responses to consultation. Modifications to the IIA will be considered where appropriate and proportionate to the level of change being made to the Local Plan. A change is likely to be significant if it substantially alters the Local Plan and / or is likely to give rise to significant effects.

- 2.22 Further assessment may be required if the changes have not previously been assessed and are likely to give rise to significant effects. A further round of consultation on the IIA may also be required in such circumstances, but this will only be undertaken where necessary. Changes to the Local Plan that are not significant will not result in further IIA work.

Lewisham Local Plan Examination

- 2.23 This IIA Report will be submitted with the Lewisham Gypsy and Traveller Site(s) Local Plan to the Secretary of State for independent examination. This IIA Report will be examined as part of the evidence base for the Lewisham Gypsy and Traveller Site(s) Local Plan. The IIA Report will help integrate the different areas of evidence and will demonstrate why the site in the Local Plan is the most appropriate. If the necessary changes to the Local Plan resulting from Examination are significant, and were not previously subject to IIA, then further IIA may be required and the IIA Report will be updated and amended accordingly.

Lewisham Local Plan Adoption and Monitoring

- 2.24 Regulation 16 of the Environmental Assessment of Plans and Programmes Regulations 2004 sets out the relevant post-adoption requirements. The significant effects of implementing the Gypsy and Traveller Site(s) Local Plan will be monitored (as required by Regulation 17 of the Environmental Assessment of Plans and Programmes Regulations 2004). This will enable the London Borough of Lewisham to identify unforeseen adverse effects at an early stage and enable appropriate remedial actions.
- 2.25 Details of monitoring arrangements will be included in the post-adoption statement. The monitoring results will be reported in the London Borough of Lewisham's Annual Monitoring Report.

STRATEGIC ENVIRONMENTAL ASSESSMENT

- 2.26 This IIA has, where appropriate, incorporated the requirements of the Strategic Environmental Assessment (SEA) Directive (2001/42/EC). The SEA Directive requires that a formal assessment is undertaken of plans and programmes which are likely to have significant effects on the environment. The Directive has been transferred into UK law through the SEA Regulations (July 2004).
- 2.27 The SEA Directive focusses exclusively on environmental issues, whilst IIA also encompasses social and economic concerns. Government guidance on SA has been prepared to meet the requirements of the SEA Directive. Consistent with this approach, the IIA of the Gypsy and Traveller Sites Local Plan addresses the requirements of the SEA Directive.

Table 2.2 The requirements of the SEA Directive

SEA Directive Requirements	Where reported
Preparation of an environmental report in which the likely significant effects on the environment of implementing the plan or programme, and reasonable alternatives taking into account the objectives and geographical scope of the plan or programme, are identified, described and evaluated. The information to be given is: (Art. 5 and Annex I)	This IIA Report
a) An outline of the contents, main objectives of the plan or programme, and relationship with other relevant plans and programmes;	Scoping Report January 2016, Section 3 and Appendix A of this report

b) The relevant aspects of the current state of the environment and the likely evolution thereof without implementation of the plan or programme;	Scoping Report January 2016, Section 3 and Appendix B of this report
c) The environmental characteristics of areas likely to be significantly affected;	Scoping Report January 2016, Section 3 and Appendix B of this report
d) Any existing environmental problems which are relevant to the plan programme including, in particular, those relating to any areas of a particular environmental importance, such as areas designated pursuant to Directives 79/409/EEC and 92/43/EEC;	Scoping Report January 2016, Section 3 and Appendix B of this report
e) The environmental protection objectives, established at international, Community or national level, which are relevant to the plan or programme and the way those objectives and any environmental considerations have been taken into account during its preparation;	Scoping Report January 2016, Section 3, Section 4 and Appendix A of this report
f) The likely significant effects on the environment, including on issues such as biodiversity, population, human health, fauna, flora, soil, water, air, climatic factors, material assets, cultural heritage including architectural and archaeological heritage, landscape and the interrelationship between the above factors. (Footnote: These effects should include secondary, cumulative, synergistic, short, medium and long-term permanent and temporary, positive and negative effects);	Section 4 of this report
g) The measures envisaged to prevent, reduce and as fully as possible offset any significant adverse effects on the environment of implementing the plan or programme;	Section 5 of this report
h) An outline of the reasons for selecting the alternatives dealt with, and a description of how the assessment was undertaken including any difficulties (such as technical deficiencies or lack of know-how) encountered in compiling the required information;	Sections 2 and 3 of this report
i) A description of measures envisaged concerning monitoring in accordance with Article 10;	Section 5 and Appendix C of this report

<p>Consultation:</p> <p>Authorities with environmental responsibility, when deciding on the scope and level of detail of the information to be included in the environmental report (Art. 5.4).</p> <p>Authorities with environmental responsibility and the public shall be given an early and effective opportunity within appropriate time frames to express their opinion on the draft plan or programme and the accompanying environmental report before the adoption of the plan or programme (Art. 6.1, 6.2).</p>	<p>The Statement of Consultation gives full details of all consultation undertaken throughout the process</p>
<p>Other EU Member States, where the implementation of the plan or programme is likely to have significant effects on the environment of that country (Art. 7).</p>	<p>N/A</p>
<p>Taking the environmental report and the results of the consultations into account in decision-making (Art. 8).</p>	<p>The Statement of Consultation gives full details of all consultation undertaken throughout the process</p>
<p>Provision of information on the decision:</p> <p>When the plan or programme is adopted, the public and any countries consulted shall be informed and the following made available to those so informed:</p> <p>The plan or programme as adopted;</p> <p>A statement summarising how environmental considerations have been integrated into the plan or programme and how the environmental report pursuant to Article 5, the opinions expressed pursuant to Article 6 and the results of consultations entered into pursuant to Article 7 have been taken into account in accordance with Article 8, and the reasons for choosing the plan or programme as adopted, in the light of the other reasonable alternatives dealt with; and</p> <p>The measures decided concerning monitoring (Art. 9 and 10).</p>	<p>The Adoption Statement documents how environmental considerations have been integrated into the Lewisham Gypsy and Traveller Site(s) Local Plan</p> <p>Section 5 and Appendix C set out the proposed measures for monitoring</p>
<p>Monitoring of the significant environmental effects of the plan's or programme's implementation (Art. 10).</p>	<p>Section 5 and Appendix C of this report</p>
<p>Quality assurance: environmental reports should be of a sufficient standard to meet the requirements of the SEA Directive (Art. 12).</p>	<p>This table identifies how the requirements of the SEA Directive have been met</p>

EQUALITIES ANALYSIS ASSESSMENT

- 2.28 Public bodies are legally required to consider the aims of the public-sector equality duty and document their findings as part of the decision-making process. The three aims that public bodies are required to have due regard to when decision making are:
- To eliminate unlawful discrimination, harassment, victimisation and any other conduct prohibited by the Act;
 - To advance equality of opportunity between people who share a protected characteristic and people who do not share it; and
 - To foster good relations between people who share a protected characteristic and people who do not share it.
- 2.29 In order to give the required due regard to the above aims of the public-sector equality duty, Lewisham Council undertakes EAA when changing the way a service is delivered.
- 2.30 EAA is the process of systematically analysing a proposed or existing policy to identify the likely affect from the implementation of the policy on different groups in the community. EAA seeks to ensure that, as far as possible, any negative consequences for a particular group or sector of the community are eliminated, minimised or counterbalanced by other measures. The EAA process ensures that decisions and services meet the needs of local communities. Local Authorities have a duty to complete an EAA of relevant plans under the Equality Act, introduced by central government in October 2010.
- 2.31 The IIA of the Lewisham Gypsy and Traveller(s) Sites Local Plan encompasses the requirements for EAA. The diverse needs of the Lewisham community have been considered during the production of the IIA. The methodology and the approach set out within the London Borough of Lewisham's EAA toolkit has been followed in the preparation of the IIA. The baseline analysis has included an assessment of data and research. Consultation on the IIA has met the requirements for consultation in relation to EAA. The impact assessment has included due regard to the need to eliminate unlawful discrimination, to advance equality of opportunity and to foster good relations. Proposed measures for monitoring and mitigation reflect the objectives of EAA.

LIMITATIONS AND ASSUMPTIONS

- 2.32 The data relates to the London Borough of Lewisham as a whole. The following gaps in available baseline data have been identified.
- Number of developments granted planning permission incorporating renewable energy solutions;
 - Total energy used in the borough from renewable schemes;
 - Number and location of healthcare facilities;
 - New affordable housing as a percentage of all new housing;
 - Tenure mix of affordable housing;
 - Number of bedrooms in new dwellings;
 - Planning applications obtaining new open space or public access linkages per year;
 - Number of planning applications approved with waste management / recycling facilities incorporated; and
 - Specific data covering public rights of way, cycle parking and lighting.
- 2.33 Gaps in baseline data will be addressed through the ongoing monitoring processes of the Council's Annual Monitoring Report.

3.0 Context, Baseline and Objectives

LONDON BOROUGH OF LEWISHAM LOCAL PLAN

3.1 The Local Plan represents a series of planning documents, which collectively outline planning strategy and policies for the London Borough of Lewisham. Local Plan documents can be procedural or policy based.

3.2 The following procedural documents have been approved or adopted by the London Borough of Lewisham:

- Local Development Scheme (LDS) – the LDS sets out an outline of the documents Lewisham propose to prepare and the timetable for the preparation of the various documents;
- Statement of Community Involvement (SCI) – the SCI aims to ensure that local communities know when, how and for what reason a consultation is to happen. The SCI sets out the type, extent and timing of consultation in relation to planning matters in the borough;
- Annual Monitoring Report (AMR) – the AMR sets out information on whether the Council is meeting, or on track to meet, the key dates for Local Plan preparation and whether the policies in the development plan are achieving what they set out to achieve.

3.3 Policy based documents and their status are described below:

- Lewisham Core Strategy (LCS) – the principal and overarching Local Plan document, adopted in June 2011;
- Lewisham Site Allocations Local Plan (LSALP) – identifies, designates and safeguards land for a particular use, adopted in June 2013;
- Lewisham Development Management Local Plan (LDMLP) – sets out additional planning policies to guide decisions on planning applications, adopted in November 2014;
- Lewisham Gypsy and Traveller Site(s) Local Plan (LGTSLP) – will allocate a site or sites to accommodate Gypsies and Travellers in the borough;
- Lewisham Town Centre Local Plan (LTCLP) – policies and proposals for development in Lewisham town centre, this was adopted on 26 February 2014;
- Supplementary Planning Documents (SPD's) – advice and guidance on policies and proposals contained in the development plan; and
- Neighbourhood Plans – the vision and policy for how local people would like their area to develop. None as yet, although 5 forums have been established and have expressed an interest in preparing a neighbourhood plan.

3.4 The Council is in the process of preparing a new Lewisham Local Plan which will eventually replace the existing Core Strategy, Site Allocations, Lewisham Town Centre and Development Management Local Plans.

LEWISHAM GYPSY AND TRAVELLER SITE(S) LOCAL PLAN

3.5 Given the pressing need to provide traveller accommodation, the Council is developing a standalone Gypsy and Traveller Site(s) Local Plan that will sit alongside the integrated Local Plan. The Lewisham Gypsy and Traveller Site(s) Local Plan is being prepared to allocate a site, or sites, to accommodate Gypsies and Travellers in the London Borough of Lewisham, as specified in adopted Core Strategy Policy 2: Gypsies and Travellers.

- 3.6 The Lewisham Gypsy and Traveller Accommodation Needs Assessment (LGTANA) (2015) as updated August 2016 found that the provision needed to 2030 in Lewisham is for 6 pitches. Since the publication of the GTANA (2015), the Government published its revised policy on planning for traveller sites (2015). This includes a new definition of gypsy and travellers for planning policy purposes. To ensure a robust assessment of need, the GTANA (2016) identifies a need for 6 pitches up to 2031.
- 3.7 The Local Plan will provide site and development information, and guidance for the allocated site or sites, expanding on the criteria set out in adopted Core Strategy Policy 2. Two sites have been proposed as alternatives for delivering at least 6 pitches to provide for Lewisham's identified need.
- 3.8 The two sites comprise New Cross Social Club and the adjoining land, and Land at Pool Court. New Cross Social Club is currently in use as a licensed bar and hall, with car parking. Land at Pool Court comprises two parcels of vacant open land and a scaffolding yard.
- 3.9 The chosen site is likely to be designed and developed to accommodate at least 6 pitches of varying sizes to meet the needs of those households that have the greatest housing need and are top of the Council's waiting list for pitches. Pitches are likely to include a hardstanding area for a static caravan, touring caravan and parking space. Pitches are also expected to include a single-storey amenity building and some landscaping / open space. It is hoped that there would also be an area of communal play / open meeting space on the site.

PLANS, POLICIES AND PROGRAMMES

- 3.10 This section summarises plans, policies, programmes and related sustainability objectives established at other levels of the planning system that are relevant to the IIA of the Lewisham Gypsy and Traveller Site(s) Local Plan. International, European, National, London wide and Lewisham based plans and strategies are considered where they are relevant.
- 3.11 Table 3.1 provides a list of those reviewed in the context of the Lewisham Gypsy and Traveller Site(s) Local Plan. Appendix A provides further detail, explaining the plans, policies and programmes relevance to the Lewisham Gypsy and Traveller Site(s) Local Plan and the IIA, and how they have been considered during the IIA process.

Table 3.1: Plans, Policies and Programmes

Plans, Policies and Programmes
International
<ul style="list-style-type: none"> • The Johannesburg Declaration on Sustainable Development (2002) • The Kyoto Agreement (1997) • Convention concerning the Protection of the World Cultural and Natural Heritage (1972) (UNESCO) • Agenda 21 Declaration, UNCED Rio de Janeiro (1992) • Convention on Biological Diversity, Rio de Janeiro (1992)
European
<ul style="list-style-type: none"> • SEA Directive 2001/42/EC • European Sustainable Development Strategy (2001) (Reviewed in 2009) • European Spatial Declaration on Sustainable Development (1999) • European Spatial Development Perspective (1999) • European Directive 92/43/EEC (& 97/62/EC) on the conservation of natural habitats and of wild fauna and flora

- European Directive on Conservation of Wild Birds 2009 (2009/147/EC)
- European Directive 2002/49/EC (Noise)
- European Directive on Ambient Air Quality Assessment and Management (96/62/EC) and daughter directives
- European Directive 2000/60/EC (Water Framework Directive)
- EU Community Biodiversity Strategy 2012-2020
- EU Landfill Directive (99/31/EC)
- European Waste Framework Directive (2008/98/EC)
- Directive 2003/87/EC (establishing a scheme for greenhouse gas emission allowance trading)
- EU Seventh Environmental Action Plan 2013-2020

National

- National Planning Policy Framework (2012)
- National Policy on Planning for Traveller Sites (2015)
- National Planning Practice Guidance (2014)
- Environmental Assessment of Plans & Programmes Regulations (2004)
- The Housing and Planning Act (2016)
- Housing White Paper (2017)
- Planning and Compulsory Purchase Act (2004)
- Town and Country Planning Act (1990)
- Housing Act (2004)
- Planning and Energy Act (2008)
- Climate Change Act (2008)
- The Equalities Act (2010)
- Noise Policy Statement for England (2010)
- UK Air Quality Strategy 'Working together for clean air' (Defra 2007)
- Energy White Paper 2003 'Our energy, our future, creating a low carbon economy'
- Environment Agency, Creating a better place strategy 2010-2015
- Thames Catchment Flood Management Plan and TE2100 Plan 2012
- Thames River Basin Management Plan (2009)
- Climate Change and the Historic Environment (Historic England, 2007)
- Building in Context (English Heritage, CABE 2007)
- Seeing History in the View (English Heritage 2010, revised in 2012)
- Streets for All (English Heritage, 2006)
- Strategic Environmental Assessment, Sustainability Appraisal and the Historic Environment (Historic England, 2013)

- UK Climate Change Risk Assessment: Government Report (Defra, 2012)
- National Adaption Programme – Making the country resilient to a changing climate (Defra, 2013)
- Working with Natural Processes to Manage Flood and Coastal Erosion Risk (EA, 2010)
- National Flood Emergency Framework for England (Defra, 2011)
- Greater working with Natural Processes to Manage Flood and Coastal Erosion Risk (EA, 2012)
- Our River Habitats – River Habitats in the Thames River Basin District: Current State and Character (EA, 2010)
- Designing Gypsy and Traveller Sites: Good Practice Guide (2008)
- Strategic Environmental Assessment and the Historic Environment (English Heritage)
- Gypsy and Traveller Accommodation Needs and Assessment: Guidance (2007)
- Local Authorities and Gypsies and Travellers: A Guide to Responsibilities and Powers (2008)
- National Flood and Coast Erosion Management Strategy (July 2011)
- Civil Contingencies Act 2004
- Localism Act 2011
- Growth and Infrastructure Act 2013
- River Basin Management Plan 2015
- National Waste Plan and Prevention Programme
- The Water White Paper – Water for Life
- Environment Agency Classification of Water Stressed Areas
- Water Resource Management Plans
- Groundwater Protection: Principles and Practice
- Guiding Principles for Land Contamination
- Climate Change Adaptation Manual
- Catchment Abstraction Management Strategies
- Water Stress Classification
- Climate Change Information for each River Basin District
- Biodiversity Planning Toolkit
- Equality and Human Rights Commission (EHRC) 2016, Is England Fairer? England's most disadvantaged groups: Gypsies, Travellers and Roma
- EHRC 2016, Race report: Healing a divided Britain
- Traveller Movement, 2016, Impact of insecure accommodation and the living environment on Gypsies' and Travellers' health

London
<ul style="list-style-type: none"> • The London Plan (March 2016) and draft replacement London Plan (December 2017) • London Boroughs' Gypsy and Traveller Accommodation Needs Assessment (2008) • The Mayor's Air Quality Strategy (2010) and Progress Report July 2015 • The Mayor's Economic Development Strategy (2010) • The Mayor's Biodiversity Action Plan 2010-2015 • The Mayor's Cultural Strategy (2014) • The Mayor's Climate Change Adaptation Strategy (2011) • The Mayor's Transport Strategy (2010) • Mayor of London's Municipal Waste Management Strategy (2011) • Mayor's Ambient Noise Strategy (2004) • London Housing Strategy (2014) • London Tree and Woodland Framework (2005) • Revised London View Management Framework SPG (2010) • The London Rivers Action Plan (2009) • Mayor's Best Practice Guidance on Health Issues in Planning (2007) • Mayor's Supplementary Guidance Sustainable Design and Construction (2014) • Mayor's Supplementary Guidance Accessible London: Achieving an inclusive environment (2014) • Mayor's Supplementary Guidance Providing for Children and Young People's Play and Informal Recreation (2012) • Shaping Neighbourhoods: Character and Context (2014) • London Planning Statement (2014) • Housing in London (March 2016) • All London Green Grid (2012) • London's Foundations (2012) • London Housing Supplementary Planning Guidance (March 2016) • Homes for Londoners - Affordable Housing and Viability Supplementary Planning Guidance (August 2017) • London Land for Industry and Transport Supplementary Planning Guidance (2012) • London Social Infrastructure Supplementary Planning Guidance (2015)
Lewisham
<ul style="list-style-type: none"> • Lewisham Gypsy and Traveller Accommodation Needs Assessment (2015), as updated August 2016 • Lewisham Sustainable Community Strategy 2008-2028

- Lewisham Core Strategy (2011)
- Community Safety Strategy 2012-2017
- Safer Lewisham Plan 2013-2014
- Corporate Plan 2008-2011
- Lewisham Regeneration Strategy 2008-2020
- Lewisham Housing Strategy 2015 -2020
- Lewisham Municipal Waste Strategy
- Lewisham Children and Young People's Plan 2012-2015
- Lewisham Carbon Reduction and Climate Change Strategy (2008)
- Social Inclusion Strategy 2005-13
- Healthier Communities – A health and well-being framework for Lewisham (2007-2010)
- Lewisham Leisure and Open Space Study (2010)
- Local Biodiversity Action Plan – A Natural Renaissance for Lewisham 2006-2011
- Comprehensive Equalities Scheme 2016-2020
- Better futures: Lewisham's Homelessness Prevention Strategy 2009-2014
- Lewisham Borough Sports Plan 2010-13
- Lewisham Local Air Quality Action Plan (2008)
- Lewisham Strategic Flood Risk Assessment (2008)
- Lewisham Strategic Flood Risk Assessment Update (2015)
- Lewisham Flood Risk and Development Sequential Test (2009)
- Lewisham Surface Water Management Plan (April 2011)
- Lewisham Local Implementation Plan (Transport) 2010) (LIP)
- Lewisham Strategic Housing Market Assessment 2008 and the South-East London Sub-regional SHMA (2009)
- Health, Well-Being and Care – Lewisham Joint Strategic Needs Assessment (JSNA) (2009)
- Lewisham Health and Wellbeing Strategy (2015)
- Lewisham Conservation Area Management Plans
- Lewisham Borough Wide Character Study (2010)
- Control of Pollution and Noise from Demolition and Construction Sites Code of Practice May (2008)
- Creative Lewisham – Lewisham Cultural and Urban Development Commission 2009-2013
- Control of Pollution and Noise from Demolition Construction Sites Code of Practice May (2008)
- Healthy Weight Healthy Lives (PCT with LB Lewisham) (2009)

- Creative Lewisham – Lewisham Cultural and Urban Development Commission 2009-2013
- Control of Pollution and Noise from Demolition Construction Sites Code of Practice May (2008)
- Lewisham River Corridor Improvement Plan (2015)
- Lewisham Planning Obligations SPD (2015)
- Lewisham Bromley Road Supplementary Planning Document (2009)
- Hatcham Conservation Area Character Appraisal (2006)
- Culverley Green Conservation Area Character Appraisal (2001)

CURRENT AND PREDICTED FUTURE SOCIAL, ECONOMIC AND ENVIRONMENTAL BASELINE CHARACTERISTICS

- 3.12 The baseline outlines the current and likely future state of the London Borough of Lewisham. The baseline provides the context for predicting and monitoring the impacts of the Lewisham Gypsy and Traveller Site(s) Local Plan. The baseline assessment supports the identification of the sustainability issues in the London Borough of Lewisham relevant to the Lewisham Gypsy and Traveller Site(s) Local Plan. The baseline information was reported in the Scoping Report January 2016. The updated relevant information is set out in Appendix B.
- 3.13 The baseline data and the policy context have been used to identify the relevant requirements, the current issues and the likely future trends in the London Borough of Lewisham. In some cases, there are constraints which must be overcome, or impacts which must be avoided. In other cases, the baseline presents opportunities.
- 3.14 The general sustainability issues for the Lewisham Gypsy and Traveller Site(s) Local Plan have been identified and are presented under broad themes in Table 3.2, below.

Table 3.2 Sustainability Requirements, Issues and Trends

Key issues	Source
Social Progress that meets the needs of Everyone	
<p>The population, including the Gypsy and Traveller population, is expected to rise. Lewisham must make provision for additional pitches to accommodate Gypsies and Travellers.</p> <p>The demand for affordable housing in Lewisham is very high.</p>	<p>National Planning Policy Framework (2012)</p> <p>National Policy on Planning for Traveller Sites (2015)</p> <p>Housing Act (2004)</p> <p>The Housing and Planning Act (2016)</p> <p>The London Plan (March 2016)</p> <p>London Boroughs' Gypsy and Traveller Accommodation Needs Assessment (2008)</p> <p>London Housing Strategy (2010)</p> <p>Housing in London (2016)</p> <p>Lewisham Core Strategy (2011)</p> <p>Lewisham Housing Strategy 2015 -2020</p> <p>Lewisham Gypsy and Traveller Accommodation Needs Assessment (2015) as updated August 2016</p>

<p>The health of the Gypsy and Traveller population is an essential consideration, including access to healthcare and opportunities for healthy lifestyles.</p>	<p>National Planning Policy Framework (2012) National Policy on Planning for Traveller Sites (2015) The London Plan (March 2016) Healthier Communities – A health and well-being framework for Lewisham (2007-2010) Equality and Human Rights Commission (EHRC) 2016, Is England Fairer? England’s most disadvantaged groups: Gypsies, Travellers and Roma EHRC 2016, Race report: Healing a divided Britain Traveller Movement, 2016, Impact of insecure accommodation and the living environment on Gypsies’ and Travellers’ health</p>
<p>There are areas with high levels of poverty and social deprivation in the London Borough of Lewisham.</p>	<p>Mayor’s Supplementary Guidance Accessible London: Achieving an inclusive environment Social Inclusion Strategy 2005-13</p>
<p>Gypsy and Traveller sites must be located where there is good access to leisure facilities, community infrastructure and key local services. The environment should encourage walking and cycling.</p>	<p>National Planning Policy Framework (2012) National Policy on Planning for Traveller Sites (2015) The London Plan (March 2016) Lewisham Core Strategy (2011)</p>
<p>Crime, antisocial behavior and fear of crime are important considerations. A safe environment should be created, with high quality, people friendly spaces. Pedestrian movements, lighting and improvements to unsafe areas should be considered.</p>	<p>Lewisham Sustainable Community Strategy 2008-2020 Community Safety Strategy 2008-2011 Safer Lewisham Plan 2013-2014</p>
<p>Lewisham is the 15th most ethnically diverse local authority in England and 130 different languages are spoken.</p>	<p>Lewisham Regeneration Strategy 2008-2020</p>

Effective protection of the Environment and prudent use of resources	
<p>Gypsy and Traveller sites should be located in areas with good access to sustainable transport.</p> <p>Public transport needs to be made more appealing and car movements and car parking better managed.</p> <p>With predicted population growth there is a current and future need to increase the use of sustainable modes of transport and reduce carbon emissions.</p> <p>There is a need to reduce pollution from transport, particularly private cars.</p>	<p>National Planning Policy Framework (2012)</p> <p>National Policy on Planning for Traveller Sites (2015)</p> <p>The London Plan (March 2016)</p> <p>The Mayor's Transport Strategy (2010)</p> <p>Lewisham Core Strategy (2011)</p> <p>Lewisham Local Implementation Plan (Transport) (2010) (LIP)</p>
<p>Climatic change due to greenhouse gas emissions from fossil fuel use is likely to affect the natural environment.</p> <p>Viable decentralised renewable energy networks should be developed where applicable to supply energy to Gypsy and Traveller sites. There is a need to increase the proportion of energy used from renewable resources.</p> <p>Climate change may result in increased frequency of flooding. Damage to rural roads and overloading of sewers may become more commonplace.</p>	<p>National Planning Policy Framework (2012)</p> <p>National Policy on Planning for Traveller Sites (2015)</p> <p>Planning and Energy Act (2008)</p> <p>Climate Change Act (2008)</p> <p>Energy White Paper (2003)</p> <p>The London Plan (March 2016)</p> <p>London Climate Change Adaptation Strategy (2008)</p> <p>Lewisham Carbon Reduction and Climate Change Strategy (2008)</p> <p>Department for Energy and Climate Change</p>
<p>Water efficiency initiatives are needed to reduce daily water use and maintain the supply-demand balance.</p> <p>The Air Quality Strategy objectives should be adhered to, particularly within the London Borough of Lewisham's five Air Quality Management Areas.</p> <p>The relationship between high noise sources and Gypsy and Traveller sites should be considered.</p>	<p>National Planning Policy Framework (2012)</p> <p>National Policy on Planning for Traveller Sites (2015)</p> <p>Noise Policy Statement for England (2010)</p> <p>UK Air Quality Strategy (DEFRA 2007)</p> <p>The London Plan (March 2016)</p> <p>The Mayor's Air Quality Strategy (2010)</p> <p>Mayor's Ambient Noise Strategy</p> <p>Thames Water Resources Management Plan</p> <p>Lewisham Local Air Quality Action Plan (2008)</p> <p>Lewisham Assessment of Air Quality (2009)</p> <p>Lewisham Strategic Flood Risk Assessment (2008)</p>

<p>Gypsy and Traveller sites should be provided at locations with good access to open space. The adequacy and quality of open space should be considered.</p> <p>The provision of Gypsy and Traveller sites should be balanced with the protection of designated nature conservation sites, biodiversity, flora and fauna.</p>	<p>National Planning Policy Framework (2012)</p> <p>National Policy on Planning for Traveller Sites (2015)</p> <p>The London Plan (March 2016)</p> <p>The Mayor's Biodiversity Action Plan 2010-2015</p> <p>Lewisham Core Strategy (2011)</p> <p>Local Biodiversity Action Plan – A Natural Renaissance for Lewisham 2006-2011</p> <p>Lewisham Leisure and Open Space Study (2010)</p>
<p>Gypsy and Traveller sites should be allocated avoiding areas at risk of flooding.</p>	<p>National Planning Policy Framework (2012)</p> <p>National Policy on Planning for Traveller Sites (2015)</p> <p>Thames Catchment Flood Management Plan</p> <p>Thames River Basin Management Plan (2009)</p> <p>The London Plan (March 2016)</p>
<p>There are areas of Lewisham which require an improved image, in terms of design and the built form.</p> <p>The design of the natural environment requires consideration in terms of open space.</p> <p>Spaces and places need to be of high design quality, respecting historical features and promoting local distinctiveness, providing access for all.</p> <p>There is a need to address linkages between design and achieving objectives for the delivery of Gypsy and Traveller sites.</p>	<p>National Planning Policy Framework (2012)</p> <p>National Policy on Planning for Traveller Sites (2015)</p> <p>Designing Gypsy and Traveller Sites: Good Practice Guide (2008)</p> <p>The London Plan (March 2016)</p> <p>Mayor's Supplementary Guidance Sustainable Design and Construction (2014)</p> <p>Lewisham Core Strategy (2011)</p>
<p>The provision of Gypsy and Traveller sites should be balanced with the need to protect listed buildings, conservation areas and other heritage assets, respecting the architectural identity and character of the Borough.</p>	<p>National Planning Policy Framework (2012)</p> <p>National Policy on Planning for Traveller Sites (2015)</p> <p>English Heritage documents</p> <p>The London Plan (March 2016)</p> <p>London's Foundations (2012)</p> <p>Lewisham Core Strategy (2011)</p> <p>Hatcham Conservation Area Character Appraisal (2006)</p> <p>Culverley Green Conservation Area Character Appraisal (2001)</p>

Waste generation should be reduced and recycling rates should be improved.	Mayor of London's Municipal Waste Management Strategy (2008) Lewisham Municipal Waste Strategy
Maintenance of high and stable levels of economic growth	
Sustained economic growth is essential as Lewisham's underlying economy is one of the smallest in London. The provision of Gypsy and Traveller sites should be balanced with the provision of employment land, particularly for small and medium size enterprises.	National Planning Policy Framework (2012) National Policy on Planning for Traveller Sites (2015) The London Plan (March 2016) The Mayor's Economic Development Strategy (2010) Lewisham Core Strategy (2011)
Access to education, skills and training is vital, as 25% of the population of Lewisham has no qualifications. A linkage with apprentice schemes needs to be considered.	The Mayor's Economic Development Strategy (2010)
Gypsy and Traveller sites should be provided at locations with good access to employment.	National Planning Policy Framework (2012) National Policy on Planning for Traveller Sites (2015) The London Plan (March 2016) The Mayor's Economic Development Strategy (2010) Lewisham Core Strategy (2011)

SUSTAINABILITY OBJECTIVES, TARGETS AND INDICATORS

- 3.15 The sustainability objectives provide a method for describing, analysing and comparing the sustainability effects of the Lewisham Gypsy and Traveller Site(s) Local Plan. A series of sustainability objectives were developed at the scoping stage, taking into account the relationship between the Lewisham Gypsy and Traveller Site(s) Local Plan and the objectives of other plans and programmes, along with the findings of the baseline information review. The sustainability objectives were developed and consulted on as part of the scoping process. These objectives have been refined to reflect the changing sustainability concerns in the borough.
- 3.16 The objectives are supported by specific, measurable, achievable, realistic and time related (SMART) indicators. The objectives and indicators facilitate the comparison of options, the prediction and assessment of impacts and monitoring. The IIA framework focusses on areas where significant effects are likely. The sustainability objectives and indicators are presented in Table 3.3 below.

Table 3.3: IIA objectives and indicators

IIA Objective	Indicator
Social	
1. To provide sufficient housing and the opportunity to live in a decent home	Number of housing completions Gypsy and Traveller pitches Number of affordable housing completions (by tenure type) Mix of housing tenure Mix of dwelling type and size Provision of student/other specialist housing Number of households in housing need
2. To improve the health of the population	Households with limiting long-term illness Mortality rate from circulatory diseases at age under 75 Mortality rate from all cancers at age 75 or under Health life expectancy at age 65 Number of people taking part in activities that improve physical and mental health in the borough Indices of deprivation: health deprivation and disability; barriers to housing and services domain; and living environment domains
3. To reduce poverty and social exclusion	Number of recorded racial incidents Indices of Multiple Deprivation 2015: Employment and Income Domains Children in Poverty (under 16s)
4. To improve accessibility to leisure facilities, community infrastructure and key local services	Gain/loss of community/recreational facilities Delivery of identified social infrastructure Funding for community facility improvements secured
5. To reduce crime, antisocial behavior and the fear of crime	Number of schemes incorporating 'secured by design' Indices of deprivation: Crime domain Number of offences per 1,000 population Numbers of types of crime per annum (Metropolitan Police) Reports of anti-social behavior (Metropolitan Police)

	<p>Indicators for the following:</p> <ul style="list-style-type: none"> • Violence against the person; • Burglaries; • Robberies; • Violent crime; • Sexual offences.
Environmental	
6. To reduce car travel and improve accessibility by sustainable modes of transport	<p>Number of car parking spaces delivered in new development</p> <p>Number of completed car limited developments</p> <p>Number of car clubs and parking bays</p> <p>% of permitted major developments with a travel plan</p> <p>Proportion of journeys made on foot and by bicycle</p> <p>Number of electric car charging points</p> <p>Improvements to legibility and signage</p> <p>Improved pedestrian and cycle routes and crossings</p> <p>Number of cycle parking spaces provided for each new home or other development and public realm</p> <p>Improved lighting and natural surveillance on pedestrian and cycle paths</p> <p>Number of road accident casualties per 1,000 population serious or fatal</p> <p>Public transport accessibility levels</p> <p>Transport related CO2 emissions</p>
7. To mitigate and adapt to the impact of climate change	<p>Number of homes achieving Code for Sustainable Homes level 4 or above granted/completed</p> <p>Number of BREEAM buildings granted/completed</p> <p>Number and capacity of decentralised energy granted/completed</p> <p>Number, type and capacity of renewable energy granted/completed</p> <p>Number and size of living roofs granted/completed</p> <p>Number of new developments incorporating water efficiency measures</p>

<p>8. To improve air quality and water quality, manage water resources and reduce noise and vibration</p>	<p>Water pollution incidents</p> <p>Change in chemical river quality</p> <p>Number of developments approved against the recommendation of the statutory water/sewerage undertaker on low pressure/flooding grounds</p> <p>LLSOA Electricity and Gas consumption</p> <p>Per capita reductions in CO2</p> <p>Levels exceeding Main Air Pollutant Quality Standards</p> <p>Levels of NO2 and PM10</p> <p>Number of complaints related to noise from roads, construction, maintenance, noisy neighbours and/or other.</p> <p>Number of Considerate Constructors schemes registered with new developments and refurbishments</p> <p>Estimated water consumption of new development</p>
<p>9. To increase, maintain and enhance open space, biodiversity, flora and fauna</p>	<p>Area of designated habitats</p> <p>Number and size of biodiverse brown living roofs granted/completed</p> <p>Number of bat and other bird boxes delivered as part of new developments</p> <p>Number of applications granted or refused on designated open space and within SINCS</p> <p>Amount of new or improved open space provided, including that which provides a net gain for biodiversity and accessible natural greenspace</p> <p>Number of new allotments and community gardens</p> <p>Funding secured for open space improvements</p> <p>Waterways created, restored or enhanced</p>
<p>10. To mitigate and reduce flood risk, improve water quality, manage water resources and restore and enhance the river network</p>	<p>Number of planning permissions granted contrary to the advice of the Environment Agency on either flood defense grounds or water quality</p> <p>Number of SUDS granted and delivered</p> <p>Flooding incidents</p> <p>Condition of any flood defenses</p>
<p>11. To maintain and enhance landscapes and townscapes</p>	<p>Number of key views maintained and enhanced</p>

	<p>Pre- applications and applications considered by the design review panel</p> <p>Number of interventions aimed at improving streetscapes</p> <p>Density of housing</p>
12. To conserve and where appropriate enhance the historic environment	<p>Number of designated heritage assets (including listed buildings and conservation areas)</p> <p>Number of undesignated heritage assets (locally listed buildings, areas of archaeological significance)</p> <p>% of applications where archaeological strategies were developed and implemented</p> <p>Number of applications that have considered views of strategic importance</p> <p>Number of conservation areas with up to date conservation area character appraisals or at risk (absent conservation area appraisal)</p> <p>Condition of designated and undesignated heritage assets</p>
13. To minimise the production of waste and increase waste recovery and recycling	<p>% of waste recycled, reused or composted</p> <p>Tonnes of waste sent to landfill per year</p> <p>Residual household waste per year</p> <p>Amount of waste recycled on site by residents and employment industries</p>
14. To reduce land contamination and safeguard soil quality and quantity	<p>Number of planning applications with the potential for land contamination</p> <p>Number of identified contaminated sites</p> <p>Number of new homes built on previously developed land</p>
Economic	
15. To encourage sustained economic growth	<p>Area of employment land with mixed use employment location (MEL) and local employment location (LEL)</p> <p>Size and type of employment floorspace</p> <p>Amount of vacant employment floorspace</p> <p>Amount of new completed employment floor space</p> <p>New business registration rate</p> <p>Rent levels of employment accommodation</p>
16. To promote access to employment, education, skills and training	<p>Employee numbers in Lewisham</p> <p>Indices of deprivation: Education, skills and training domain</p>

	<p>% of businesses in the area showing employment growth</p> <p>Job density in Lewisham</p> <p>Number of employed and unemployed living in the area</p> <p>Numbers of employees and business owners who are BME</p> <p>% of population of working age who claim unemployment benefit</p> <p>Number of pupils achieving 5 or more GCSE's at grades A* to C or equivalent</p> <p>% of population aged 16-74 with no qualifications</p> <p>Number of full and part time courses provided</p> <p>Number of full and part time people participating in educational courses/events in the area</p> <p>% of population in Lewisham with higher education qualifications</p> <p>Funding secured for improvements in the quality and level of education infrastructure</p>
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4.0 Integrated Impact Assessment

CORE STRATEGY POLICY 2

- 4.1 The IIA and SEA of the London Borough of Lewisham's Core Strategy included an assessment of Core Strategy Policy 2. The allocation of sites for Gypsies and Travellers was deemed to have a positive sustainability impact on meeting housing need. Impacts dependent on implementation include access to public transport and facilities, respecting the amenity of neighbouring properties and protecting existing habitats and biodiversity.

ASSESSMENT OF SUITABLE ALTERNATIVES

- 4.2 Sustainability criteria relating to access to facilities and services, access to the road network, land use, health and environmental quality informed the identification of the potential sites from the following list of potential sites. Land ownership, planning considerations and deliverability also informed the site selection process.
- A – Land off Westbourne Drive SE23;
 - B – Land off Turnham Road SE4;
 - C – New Cross Social Club and adjoining land, Hornshay Street SE15;
 - D – Land at rear of 46 – 116 Baizdon Road SE23;
 - E – Land at Pool Court SE6;
 - F – Land at St Mildred's Road, Hither Green SE12.

SUSTAINABILITY APPRAISAL

- 4.3 It is important that the Lewisham Gypsy and Traveller Site(s) Local Plan is in accordance with sustainability principles. The potential sites, C – New Cross Social Club and adjoining land, and E – Pool Court, have been assessed in accordance with the SEA Directive and related UK regulations. The likely significant effects on the environment of implementing the Lewisham Gypsy and Traveller Site(s) Local Plan are identified, evaluated and described in Tables 4.2 and 4.3. An evidence based approach has been adopted to:
- Identify changes to the baseline which are predicted to arise from the implementation of the Lewisham Gypsy and Traveller Site(s) Local Plan;
 - Describe the changes in terms of their magnitude, geographical scale, time period over which they will occur, whether they are permanent or temporary, positive or negative, the level of probability of the effect arising and any secondary, cumulative and / or synergistic effects.
- 4.4 The assessment incorporates EAA. The Lewisham Gypsy and Traveller Site(s) Local Plan has been systematically analysed to identify the effect, or likely effect, of implementation for different groups in the community. The assessment seeks to ensure that, as far as possible, any negative consequences for a particular group or sector of the community are eliminated, minimised or counterbalanced by other measures.
- 4.5 Evidence based predictions and evaluations are both qualitative and quantitative. The sites have been assessed in terms of their impact against the sustainability objectives, to assist in refining the Lewisham Gypsy and Traveller Site(s) Local Plan. The following symbols have been used to assess overall whether the contribution that each site makes in relation to each of the sustainability objectives is positive, negative, neutral or uncertain. The assessments are set out in Tables 4.2 and 4.3.

Table 4.1: Assessment symbols

Symbol	Contribution
√√	Significant positive
√	Positive
0	Neutral
x	Negative
xx	Significant negative
?	Unknown

NEW CROSS SOCIAL CLUB AND ADJOINING LAND

Table 4.2: Integrated Impact Assessment

IIA Objective	Integrated Impact Assessment	Comments
Social		
1. To provide sufficient housing and the opportunity to live in a decent home	√√	The site has capacity to accommodate the 6 pitches required in the borough up to 2031.
2. To improve the health of the population	√	The proposed site would address some of the inequalities facing the Gypsy and Traveller population, particularly in terms of health. Subject to consultation, the MUGA would be partially or wholly replaced as part of the proposed development. Therefore, the potential negative effect would be wholly or partially counteracted.
3. To reduce poverty and social exclusion	x	The loss of the social club / hall used for community events could have a local negative effect on social exclusion.
4. To improve accessibility to leisure facilities, community infrastructure and key local services	x	The loss of the social club / hall used for community events could have a local negative effect on community infrastructure.
5. To reduce crime, antisocial behavior and the fear of crime	?	The effects on crime, antisocial behavior and fear of crime will be dependent on policy implementation.

Environmental		
6. To reduce car travel and improve accessibility by sustainable modes of transport	√√	The site has convenient access to bus services and the railway network.
7. To mitigate and adapt to the impact of climate change	0	The site will have a neutral effect on climate change. The loss of the social club / hall used for community events may result in a slight negative effect on climate change, as journey lengths will be increased. The site does, however, have good access to public transport, which helps to mitigate the effect.
8. To improve air quality and water quality, manage water resources and reduce noise and vibration	0	The site will not have a significant effect on air, water or noise.
9. To increase, maintain and enhance open space, biodiversity, flora and fauna	√	The proposed tree planting along the boundary with Hornshay Street will enhance biodiversity and flora.
10. To mitigate and reduce flood risk, improve water quality, manage water resources and restore and enhance the river network	?	The site is within an area at risk from flooding identified by the Environment Agency (Flood Risk Zone 3a – high fluvial flood risk identified). However, based on the presence of existing defenses the actual risk to property is considered low. There is moderate to high surface water flood risk on parts of the site.
11. To maintain and enhance landscapes and townscapes	√	The demolition of the existing buildings and tree planting along Hornshay Road would have a positive effect on the townscape in the medium to long term.
12. To conserve and where appropriate enhance the historic environment	0	The site would have a neutral effect on the historic environment, including Hatcham Conservation Area, which is situated to the south east.

13. To minimise the production of waste and increase waste recovery and recycling	?	Effects on the production of waste and increased waste recovery and recycling will be dependent on implementation of the policy.
14. To reduce land contamination and safeguard soil quality and quantity	0	The site would have a neutral effect on land contamination.
Economic		
15. To encourage sustained economic growth	√	The future residents could make a contribution to the local labour market.
16. To promote access to employment, education, skills and training	√	The site has convenient access to local employment and education.

LAND AT POOL COURT

Table 4.3: Integrated Impact Assessment

IIA Objective	Integrated Impact Assessment	Comments
Social		
1. To provide sufficient housing and the opportunity to live in a decent home	√√	The site has capacity to accommodate the 6 pitches required in the borough up to 2031.
2. To improve the health of the population	0	The preferred site will not have a significant effect on the health of the population. The proposed site would address some of the inequalities facing the Gypsy and Traveller population, particularly in terms of health.
3. To reduce poverty and social exclusion	0	The preferred site will have a neutral effect on poverty and social exclusion. The Traveller Outreach Officer will engage with the local community and the traveller community.
4. To improve accessibility to leisure facilities, community infrastructure and key local services	√	The site has convenient access to local facilities and services.
5. To reduce crime, antisocial behavior and the fear of crime	?	The effects on crime, antisocial behavior and fear of crime will be dependent on policy implementation.
Environmental		
6. To reduce car travel and improve accessibility by sustainable modes of transport	√√	The site has convenient access to bus services and the railway network.
7. To mitigate and adapt to the impact of climate change	0	The preferred site will have a neutral effect on climate change. The design guidelines set out within the draft Gypsy and Traveller Local Plan require as many of the existing trees and as much of the mature vegetation as possible to be retained, with additional tree planting along the boundaries with Pool Court.

8. To improve air quality and water quality, manage water resources and reduce noise and vibration	0	The preferred site will not have a significant effect on air, water or noise.
9. To increase, maintain and enhance open space, biodiversity, flora and fauna	x	The loss of open land could have a local adverse effect on biodiversity, flora and fauna. The design guidance within the draft Gypsy and Traveller Local Plan identifies that provision should be made for new habitat where practicable and viable, including living roofs and walls, native planting, nesting boxes and log piles.
10. To mitigate and reduce flood risk, improve water quality, manage water resources and restore and enhance the river network	?	The preferred site is within an area at risk from flooding identified by the Environment Agency (part in Flood Zone 2, part in Flood Zone 3a). There is a medium risk of fluvial flooding, with a high risk of surface water flooding due to topography, and moderate groundwater risk. There is a reasonable prospect of the sequential and exceptions tests being met.
11. To maintain and enhance landscapes and townscapes	x	The loss of open land, particularly the area to the north west of Pool Court, could have a local negative landscape effect. The design guidance with the draft Gypsy and Traveller Local Plan requires the retention of existing trees and vegetation where possible, along with new tree planting on the boundaries with Pool Court.
12. To conserve and where appropriate enhance the historic environment	0	The preferred site would have a neutral effect on the historic environment and there would be a very limited impact on the Culverley Green Conservation Area which is adjacent to the site.

		The site is located adjacent to an area of known archaeological potential. It is therefore anticipated that archaeological consideration would be required in the event of a planning application.
13. To minimise the production of waste and increase waste recovery and recycling	?	Effects on the production of waste and increased waste recovery and recycling will be dependent on implementation of the policy.
14. To reduce land contamination and safeguard soil quality and quantity	0	The preferred site would have a neutral effect on land contamination.
Economic		
15. To encourage sustained economic growth	√	The future residents could make a contribution to the local labour market.
16. To promote access to employment, education, skills and training	√	The site has convenient access to local employment and education.

FURTHER DETAIL RELATING TO LAND AT POOL COURT

- 4.6 The site is located in Catford, to the south of the River Ravensbourne and to the west of the railway line, at the corner of Pool Court and Fordmill Road. The eastern part of the site is currently used as a scaffolding yard, whilst the western part is vacant open land.
- 4.7 The Land at Pool Court site has been identified by Lewisham Council officers as the preferred potential site, for further investigation. The main reason for officers' selection of Land at Pool Court as the preferred potential site was the loss of community space at New Cross Social Club (the social club and possibly the games court area) that the allocation of this site and adjoining land would incur. Pool Court is preferred by the Lewisham Traveller community; It is more self-contained, without being isolated; the site is better suited to relatively low-density housing (suburban character and lower public transport accessibility); it is outside Lewisham's Regeneration and Growth Area and the London Plan Lewisham, Catford and New Cross Opportunity Area, where bricks and mortar housing and employment growth is focused, and it would not result in the loss or displacement of existing community facilities or housing. Loss of community space was considered to have a very negative effect on the IIA objectives, namely IIA 3 and 4. Although the Pool Court site has a few negative impacts on the IIA objectives, it is considered that these effects can be mitigated.
- 4.8 The following builds on the above tabular assessment and provides more detailed consideration of the preferred potential site, Land at Pool Court, against the IIA objectives.
- IIA Objective 1 - To provide sufficient housing and the opportunity to live in a decent home**
- 4.9 The Land at Pool Court site would provide the 6 pitches which are required to meet the identified need for Gypsy and Traveller Sites until 2031. The allocation of the site would therefore have a significant positive effect on this IIA objective.

- 4.10 The nine protected characteristics (age, disability, gender, ethnicity, sexual orientation, religion and belief, gender reassignment, pregnancy / maternity and marriage / civil partnership) relating to EAA have been considered in the assessment. All of these protected characteristics will be unaffected by the proposals, aside from the positive effect on the Gypsy and Traveller community (an ethnicity) through the provision of accommodation to meet their needs.

IIA Objective 2 - To improve the health of the population

- 4.11 The allocation of Land at Pool Court as a Gypsy and Traveller site would not affect the number or distribution of healthcare facilities in the borough. The site is in an easily accessible location, approximately 1 mile, to existing healthcare facilities in Catford. The proposed site would address some of the inequalities facing the Gypsy and Traveller population, particularly in terms of health.

IIA Objective 3 - To reduce poverty and social exclusion

- 4.12 The site will have a neutral effect on this IIA objective. The Traveller Outreach Officer will engage with the local community and the traveller community to promote social inclusion.

IIA Objective 4 - To improve accessibility to leisure facilities, community infrastructure and key local services

- 4.13 Land at Pool Court is located approximately 1km to the south of Catford Town Centre and is within close proximity to existing local facilities and services, including banks, restaurants, supermarkets and a pharmacy. Residents would benefit from good access to these facilities and services. The convenient access to local facilities and services in Catford results in a positive effect on this IIA objective.

IIA Objective 5 - To reduce crime, antisocial behaviour and the fear of crime

- 4.14 The effects on levels of crime, antisocial behaviour and the fear of crime of allocating Land at Pool Court as a new Gypsy and Traveller site will depend on the detailed design of the site and the implementation of an Allocations and Management policy and a Site Management Plan.

IIA Objective 6 - To reduce car travel and improve accessibility by sustainable modes of transport

- 4.15 The preferred site is located in a highly accessible area. The closest bus stop is approximately 100m from the site entrance, Bellingham train station is located 1km to the south east, whilst Catford station is located 900m to the north. The proximity to these sustainable modes of transport enables residents to use non-car based modes of transport with ease. The allocation of this site would have a significant positive effect on this IIA objective.

IIA Objective 7 - To mitigate and adapt to the impact of climate change

- 4.16 The allocation of the Land at Pool Court site would have a negligible effect on this IIA objective as the effects will depend on the detailed site design. However, as considered above under objective 6, the site is well located to encourage the use of sustainable transport. In addition, the trees and hedgerows within the site could be maintained and enhanced, where possible, to contribute to reducing the effects of climate change, with further planting along the boundary with Pool Court, as described in the design guidelines included in the draft Gypsy and Traveller Local Plan.

IIA Objective 8 - To improve air quality and water quality, manage water resources and reduce noise and vibration

- 4.17 This Gypsy and Traveller preferred potential site is likely to have no significant impact on air quality, water quality or noise. The site is a brownfield site and is not located in an area where pollution is managed.

IIA Objective 9 - To increase, maintain and enhance open space, biodiversity, flora and fauna

- 4.18 The whole site is within the Pool Court Linear Park Site of Importance for Nature Conservation (SINC) which is of Borough Importance, although the Re-Survey of SINC's 2016 proposes to de-allocate the area. Planning Policy CS 12 and the Site Allocations Local Plan seek to protect SINC's. The loss of open land could result in a negative effect on the biodiversity of the site. However, this impact could be mitigated by introducing an 8-metre buffer zone with the Ravensbourne River and by incorporating ecological enhancements, such as new habitat (e.g. living roofs / walls); appropriate soft landscaping (native or wildlife species trees / shrubs); nesting boxes for birds / bats / insects; and dead wood habitat (stag beetle log piles), as set out within the design guidelines included within the draft Gypsy and Traveller Local Plan.

IIA Objective 10 - To mitigate and reduce flood risk, improve water quality, manage water resources and restore and enhance the river network

- 4.19 As detailed in the above table, the preferred site is located partly within Flood Zone 2 and partly within Flood Zone 3a. This is an area at risk from flooding identified by the Environment Agency. There is a medium risk of fluvial flooding, with a high risk of surface water flooding due to topography, and moderate groundwater risk. Therefore, the site presents a minor negative effect on this IIA objective. However, there is a reasonable prospect of the sequential and exceptions tests being met. The site design could include a drainage strategy which would mitigate the risk from flooding. Potential mitigation includes the following:

- Set back development 8-metres from the existing river channel.
- Follow guidance in the Council's River Corridor Improvement Plan SPD.
- Avoid locating caravans, car parking and hard-standing areas which could be used for storage purposes (i.e. builders rubble / machinery / plant etc.) in the western part of the site, which is at highest risk from flooding, and locate these elements of the development on higher ground or on areas which are considered at low risk.
- Incorporate SUDS (e.g. green roofs on permanent buildings) where possible.
- Include devices to control rates of discharge into the River to greenfield runoff rates (when not in flood) and consider providing attenuation ponds for surface water storage and amenity value.
- Ensure there is a safe and dry route to escape flooding.
- Prepare a Flood Evacuation Plan.

- 4.20 The above measures are considered within the draft Gypsy and Traveller Local Plan design guidelines and a Flood Risk Assessment and Drainage Strategy is required in support of any planning application.

IIA Objective 11 - To maintain and enhance landscapes and townscapes

- 4.21 The allocation of the site for Gypsies and Travellers would result in the loss of open land, particularly the area to the north west of Pool Court. This could have a locally negative landscape effect. However, the site could be suitably designed to include native planting to mitigate the landscape impact, as required by the draft Gypsy and Traveller Local Plan, ensuring a very minor effect on this IIA objective.

IIA Objective 12 - To conserve and where appropriate enhance the historic environment

- 4.22 The closest designated heritage asset, a Grade II listed telephone kiosk, is located approximately 320m to the east of the site. The allocation of the site will have no impact on this heritage asset, due to its remote location from Land at Pool Court. The site is screened from the telephone kiosk by the existing built form. There would be a very limited impact on the Culverley Green Conservation Area as the site is wholly screened from the Conservation Area by vegetation and built form. The site is located adjacent to an area identified as having known archaeological potential. It is therefore anticipated that a desk based archaeological assessment would be required in support of any planning application. The preferred site would have a neutral effect on the historic environment and therefore the site is considered to have a negligible effect on this IIA objective.

IIA Objective 13 - To minimise the production of waste and increase waste recovery and recycling

- 4.23 The effect on this IIA objective is uncertain as it depends on policy implementation and the provision of waste and recycling facilities for residents.

IIA Objective 14 - To reduce land contamination and safeguard soil quality and quantity

- 4.24 The Land at Pool Court site would have a neutral effect on this IIA objective. Much of the site is brownfield land. However, the extant use as a scaffolding yard is unlikely to have resulted in contamination. The reuse of the brownfield site will have no effect on soil quality and quantity.

IIA Objective 15 - To encourage sustained economic growth

- 4.25 The site would introduce new residents to the locality who would contribute to the vitality and viability of Catford Town Centre, as they would be likely to purchase local goods and services. Residents of the site of working age would make a positive contribution to the local labour market. It is therefore considered that there is positive effect on this IIA objective.

IIA Objective 16 - To promote access to employment, education, skills and training

- 4.26 The site is located close to both educational facilities and employment sites. Rushey Green Primary School is the closest school, located approximately 900m to the north east of the site. Employment and education in the wider area are accessible by sustainable modes of transport. There is a positive effect on this IIA objective.

5.0 Mitigation and Monitoring

MITIGATION

- 5.1 The site-specific development guidelines set out within the Lewisham Gypsy and Traveller Site(s) Local Plan provide appropriate mitigation measures associated with the implementation of the document. Further requirements for mitigation may be identified through the monitoring process. Mitigation measures should follow the hierarchy set out in Table 5.1.

Table 5.1: Mitigation hierarchy

Mitigation approach	Comment
Avoidance or prevention	This involves modifying alternative options and policies for the Local Plan
Reduction	Mitigation could focus on timing or phasing to reduce adverse effects.
Offsetting or compensation	This approach is used where opportunities are not available to either avoid or reduce adverse effects.
Remediation	Remediation is used where an adverse effect is unavoidable but the long-term effects can be reduced by restoring the affected area to its original state.
Enhancement	Although not strictly a measure to mitigate an adverse effect, enhancement is an opportunity to improve social, environmental and economic conditions. Enhancement could be used successfully to improve conditions.
Further information	Although the overall effects of the Gypsy and Traveller Site(s) Local Plan have been assessed through the IIA there may be a degree of uncertainty as to the anticipated effects of specific measures on the ground. In such circumstances mitigation could include specification of the need to conduct further assessments.

MONITORING

- 5.2 The indicators relating to each sustainability objective are set out in Table 3.3. Appendix C sets out the targets, monitoring frequency, data sources and actions relating to each indicator. Monitoring will be completed by the London Borough of Lewisham and presented within the Annual Monitoring Report.

Appendices

Appendix A
Plans, Policies and Programmes

Plans, Policies and Programmes	Relevant objectives	Implications for the Gypsy and Traveller Sites Local Plan and IIA
International – All info apart from the National Section is taken from the 2005 Scoping Report		
The Johannesburg Declaration on Sustainable Development 2002	Commitment to sustainability principles and the sustainable development agenda agreed at Rio de Janeiro Earth Summit in 1992.	The definition of sustainable development 'meeting the needs of the present without compromising the ability of future generations to meet their own needs'.
The Kyoto Agreement 1997	The key aim is to limit and/or reduce the emissions of greenhouse gases.	Reducing greenhouse gas emissions.
Convention concerning the Protection of the World Cultural and Natural Heritage 1972 (UNESCO)	Article 5 – To ensure that effective and active measures are taken for the protection, conservation and presentation of cultural and natural heritage and to adopt a general policy which aims to give the cultural and natural heritage a function in the life of the community and to integrate the protection of that heritage into comprehensive planning programmes.	The protection of Lewisham's cultural and natural heritage.
Agenda 21 Declaration Rio de Janeiro 1992	Committed countries to the principles of sustainable development. The Convention came into force on 29 December 1993. It has three main objectives: <ul style="list-style-type: none"> • Conserve biological diversity; • Sustainable use of biological diversity; • Fair and equitable sharing of the benefits of biological diversity. 	The integration and balancing of economic, environmental and social objectives. Ensure the protection and enhancement of the area's biodiversity.
Convention on Biological Diversity, Rio de Janeiro 1992	The Convention outlines three main goals for the conservation, protection and enhancement of biological diversity; the conservation of biological diversity, its sustainable use, and the equitable sharing of benefits associated with genetic resources. National strategies and action plans must be implemented by Contracting Parties to achieve these goals.	Minimise impacts on biodiversity. View ecosystems holistically, rather than focussing on islands of protected species.
European		
SEA Directive 2001/42/EC	Requires an assessment of the effects of certain plans and programmes on the environment and prescribes the environmental issues to assess.	Ensure key environmental issues are assessed and considered.

<p>European Sustainable Development Strategy 2001 (Reviewed in 2009)</p>	<p>Environmental objectives and priorities derived from the EU Sixth Environmental Action Programme focus on:</p> <ul style="list-style-type: none"> • limiting climate change and increasing the use of clean energy; • addressing threats to public health (e.g. hazardous chemicals, food safety); • combating poverty and exclusion; • dealing with the economic and social implications of an ageing society; • managing natural resources more responsibly (including biodiversity and waste generation); • improving the transport system and land use management. 	<p>The integration and balancing of economic, environmental and social objectives.</p>
<p>European Spatial Declaration on Sustainable Development, EU 1999</p>	<p>The aim is to work towards a balanced and sustainable development of the territory of the European Union.</p>	<p>The integration and balancing of economic, environmental and social objectives.</p>
<p>European Spatial Development Perspective 1999</p>	<p>ESDP aims to ensure that the three fundamental goals of European policy are achieved equally in all the regions of EU:</p> <ul style="list-style-type: none"> • economic and social cohesion; • conservation and management of natural resources and the cultural heritage; • more balanced competitiveness of the European territory. 	<p>Economic and social cohesion, protecting and enhancing historic and cultural heritage, and reducing greenhouse gas emissions.</p>
<p>European Directive 92/43/EEC (& 97/62/EC) on the conservation of natural habitats and of wild fauna and flora</p>	<p>Promote the maintenance of biodiversity by requiring member states to introduce robust protection measures to maintain or restore natural habitats and wild species.</p>	<p>Minimise the impact on natural habitats.</p>
<p>European Directive on Conservation of Wild Birds 2009 (2009/147/EC)</p>	<p>The maintenance of the favourable conservation status of all wild bird species across their distributional range.</p>	<p>Preserve habitats for birds.</p>

European Directive 2002/49/EC (Noise)	The Environmental Noise Directive aims to “define a common approach intended to avoid, prevent or reduce on a prioritised basis the harmful effects, including annoyance, due to the exposure to environmental noise”. It aims at providing a basis for developing EU measures to reduce noise emitted by major sources, in particular road and rail vehicles and infrastructure, aircraft, outdoor and industrial equipment and mobile machinery.	Mitigation of adverse impacts on health and well-being from temporary and permanent noise nuisance.
European Directive on Ambient Air Quality Assessment and Management (96/62/EC) and daughter directives	The Directives aim to reduce specified air pollutants. Limits have been translated into UK law in Air Quality Regulations.	Monitor progress in relation to air quality.
European Directive 2000/60/EC (Water Framework Directive)	To establish a framework to address pollution of waterways from urban wastewater and agriculture and to improve Europe’s waterways. Target: Member States to produce River Basin Management Plans by 2009 and to achieve the environmental objectives of the Plans by 2016.	Protection of ground and surface water from incidental, as well as accidental pollution.
EU Community Biodiversity Strategy 2012-2020	Seeks the conservation and sustainable use of biological diversity (ecosystems in their natural surroundings).	Protection and enhancement of biodiversity.
EU Landfill Directive (99/31/EC)	To prevent or reduce as far as possible negative effects on the environment, in particular the pollution of surface water, ground water, soil and air, and on the global environment, including the greenhouse effect, as well as any resulting risk to human health, from the land-filling of waste, during the whole life-cycle of the landfill.	Minimise waste generation and maximise sustainable waste management.
European Waste Framework Directive (2008/98/EC)	The Directive seeks to reduce the quantity of waste going to landfill and introduces the waste hierarchy of prevention, reuse, recycle, recovery, and disposal.	Reduce the amount of waste requiring final disposal. Monitor the proportion of waste reduced/recycled/recovered.
Directive 2003/87/EC (establishing a scheme for greenhouse gas emission allowance trading)	Introduces a European wide emissions trading scheme.	Reduce greenhouse gas emissions and overall carbon footprint. Reflect carbon reduction targets.

EU Seventh Environmental Action Plan 2013 - 2020	Seeks a high level of protection of the environment and human health and for general improvements in the environment and quality of life.	Protect and enhance overall environmental quality.
National		
National Planning Policy Framework 2012	The National Planning Policy Framework includes a presumption in favour of sustainable development and sets out the social, economic and environmental roles of the planning system.	A presumption in favour of sustainable development, considering the social, economic and environmental roles of the planning system.
National Policy on Planning for Traveller Sites (2015)	Sets out the Government's planning policy for traveller sites. The government's overarching aim is to ensure fair and equal treatment for travellers, in a way that facilitates the traditional and nomadic way of live of travellers while respecting the interests of the settled community.	<p>The Government's aims in respect of traveller sites are:</p> <ul style="list-style-type: none"> a) that local planning authorities should make their own assessment of need for the purposes of planning. b) To ensure that local planning authorities, working collaboratively, develop fair and effective strategies to meet need through the identification of land for sites. c) To encourage local planning authorities to plan for sites over a reasonable timescale. d) That plan-making and decision-taking should protect Green Belt from inappropriate development. e) To promote more private traveller site provision while recognising that there will always be those travellers who cannot provide their own sites. f) That plan-making and decision-taking should aim to reduce the number of unauthorised developments and encampments and make enforcement more effective. g) For local planning authorities to ensure that their Local Plan includes fair, realistic and inclusive policies.

		<ul style="list-style-type: none"> h) To increase the number of traveller sites in appropriate locations with planning permission, to address under provision and maintain an appropriate level of supply. i) To reduce tensions between settled and traveller communities in plan-making and planning decisions. j) To enable provision of suitable accommodation from which travellers can access education, health, welfare and employment infrastructure. k) For local planning authorities to have due regard to the protection of local amenity and local environment.
Environmental Assessment of Plans & Programmes Regulations 2004	Transposes the SEA directive into UK law.	Reflect the regulations and associated guidance note.
The Housing and Planning Act 2016	The Act sets out provision regarding housing, estate agents, rent charges, planning and compulsory purchase.	Comply with legislation.
The Housing White Paper 2017	This document sets out a broad range of reforms that government plans to introduce to help reform the housing market and increase the supply of new homes.	Comply with legislation.
Planning and Compulsory Purchase Act 2004	The Act provides the statutory planning framework for England.	Comply with legislation.
Town and Country Planning Act 1990	Sets out the procedures for the preparation, approval and adoption of Local Plans.	Comply with legislation.
Housing Act 2004	Requires Local Planning Authorities to complete an accommodation assessment and consider how to meet Gypsy and Traveller accommodation needs as part of their housing and planning requirements.	Comply with legislation.
Planning and Energy Act 2008	An Act to enable Local Planning Authorities to set requirements for energy use and energy efficiency in Local Plans.	Energy efficiency to reduce greenhouse gas emissions.

Climate Change Act 2008	The Act creates a new approach to managing and responding to climate change in the UK.	Consideration of impacts on Climate Change.
Noise Policy Statement for England 2010	<p>The Noise Policy Statement for England aims to provide the necessary clarity and direction to enable decisions to be made regarding what is an acceptable noise burden to place on society.</p> <p>To avoid significant adverse impacts on health and quality of life; mitigate and minimise adverse impacts on health and quality of life; and where possible, contribute to their improvement.</p>	<p>Avoid noise impacts.</p> <p>Mitigation of adverse impacts on health and well-being from noise.</p>
UK Air Quality Strategy 'Working together for clean air' (2007)	Everyone can enjoy a level of ambient air quality in public places which poses no significant risk to health or quality of life.	<p>Improve Air Quality.</p> <p>Encourage reduction or mitigation of air polluting land uses.</p>
Energy White Paper 2003: Our energy, our future, creating a low carbon economy	<p>The Strategy seeks to:</p> <ul style="list-style-type: none"> • Reduce waste by making products with fewer natural resources; • Break the link between economic growth and waste growth; • Most products should be used or their materials recycled; • Recover energy from other wastes. 	Waste hierarchy – reduce, reuse, recycle.
Environment Agency, Creating a better place strategy 2010-2015	The strategy shows how the EA will work in specific areas to achieve its aims relating to biodiversity, climate change, flood risk, creating sustainable places and waste management.	Biodiversity, climate change, flood risk, and waste management.
Thames Catchment Flood Management Plan	Provides an overview of flood risk in the Thames catchment and sets out the EAs preferred plan for sustainable flood risk management over the next 50 to 100 years.	Manage flood risk.
TE2100 Plan November 2012	Provides an overview of flood risk in the Thames catchment and sets out the EAs preferred plan for sustainable flood risk management over the next 50 to 100 years.	Manage flood risk.

Thames River Basin Management Plan 2009	Pressures facing the water environment in this river basin district, and the actions that will address them.	Protection of water quality.
Climate Change and the Historic Environment (English Heritage, 2007)	Provides an overview of climate change impacts on the historic environment and of the impacts associated with responses to climate change.	Impacts on heritage assets and the wider historic environment.
Building in Context (English Heritage, CABE 2007)	Provides case-study examples of how new development can respond well to historic character in terms of design.	Impacts on heritage assets and the wider historic environment.
Seeing History in the View (English Heritage 2010, revised in 2012)	Explains how the heritage significance of views can be assessed in a systematic and consistent way however these views have come into being.	Impacts on heritage assets and the wider historic environment.
Streets for All (English Heritage, 2006)	Shows how public realm upgrades can be designed to be appropriate to and enhance the historic environment.	Impacts on heritage assets and the wider historic environment.
Strategic Environmental Assessment, Sustainability Appraisal and the Historic Environment (Historic England, 2013)	Guidance focuses on SEA/SA for development plans. Committed to the principles of sustainable development.	Impacts on heritage assets and the wider historic environment.
National Flood Emergency Framework for England (Defra, 2011)	Provides a framework to follow in a flooding emergency.	Design of Gypsy and Traveller sites.
Gypsy and Traveller Accommodation Needs and Assessment: Guidance 2007	Guidance which aims to provide advice on carrying out an assessment of accommodation needs of Gypsies and Travellers.	Needs of Gypsies and Travellers.
Local Authorities and Gypsies and Travellers: A Guide to Responsibilities and Powers 2008	Guidance towards all aspects associated with Gypsy/Traveller developments.	Responsibilities associated with Gypsies and Travellers.
Drfat guidance to housing authorities on the periodical review of housing needs – Caravans and Houseboats (March 2016)	Draft guidance which aims to provide advice on carrying out an assessment of accommodation needs for caravans and houseboats.	Needs of Gypsies and Travellers
National Flood and Coast Erosion Management Strategy (July 2011)	Objective <ul style="list-style-type: none"> • ensure a clear understanding of the risks of flooding and coastal erosion • set out clear and consistent plans for risk management • manage flood and coastal erosion risks in an appropriate way 	Impacts on Environment.

	<ul style="list-style-type: none"> ensure that emergency plans and responses to flood incidents are effective help communities to recover more quickly and effectively after incidents. <p>Aim</p> <ul style="list-style-type: none"> put in place long-term plans to manage risks ensuring other plans take account of them avoiding inappropriate development in areas of flood and coastal erosion risk 	
Civil Contingencies Act 2004 (CCA)	<p>This legislation aims to provide a single framework for civil protection.</p> <p>The Act, and accompanying non-legislative measures, delivers a single framework for civil protection in the country. The National Flood and Coast Erosion Management Strategy (July 2011) require communities to prepare flood action plans and link with the Cabinet Office's initiative to develop wider community resilience to threats and hazards.</p>	Impacts on Environment.
Localism Act	<p>Planning and regeneration provisions will provide for neighbourhood development orders to allow communities to approve development without requiring normal planning consent. Local authorities, the Environment Agency and other prescribed bodies are obliged to work together on certain strategic matters under the 'duty to cooperate' in the Localism Act in England. In particular, these organisations should cooperate across boundaries because flood risk often requires wider than local consideration.</p>	Impacts on Environment.

	<p>The Localism Act also requires lead local flood authorities (LLFAs) to make arrangements for overview and scrutiny committees to review and scrutinise risk management authorities. Risk management authorities are now under a duty to comply with a request made by an overview and scrutiny committee for information or a response to a report in relation to its flood or coastal erosion risk management functions.</p>	
<p>Growth and Infrastructure Act 2013 (April 2013)</p>	<p>The Act:</p> <p>Allows the modification or discharge of the affordable housing elements of section 106 planning gain agreements in order to make developments more viable.</p> <p>Contains the controversial measures to extend permitted development rights to allow single-storey extensions of up to eight metres.</p> <p>Introduces measures to allow developers to take planning applications to the Planning Inspectorate where a council has "consistently failed to meet statutory requirements to consider applications on time".</p>	<p>Impacts on Environment.</p>
<p>River Basin Management Plan 2015</p>	<p>This provides an important baseline not only for the status of the river water bodies mentioned in the IIA but also the groundwater bodies that were not mentioned in the IIA.</p>	<p>Impacts on Environment.</p>
<p>National Waste Plan and Waste Prevention Programme</p>	<p>This plan provides an analysis on waste management in England, bringing current and planned waste management policies together in one place.</p>	<p>Impacts on Environment.</p>

The Water White Paper – Water for Life	The Water White Paper focuses on the challenges facing the water sector, including maintaining water supplies, keeping bills affordable and reducing regulation. It recognises the need to protect rivers, streams and lakes from pollution and unsustainable abstraction, and acknowledges the critical importance of water supply and sewerage infrastructure.	Impacts on Environment.
Groundwater Protection: Principles and Practice (GP3)	The GP3 document is a key Environment Agency reference for LPAs, developers and land owners. It is an important accompaniment to the River Basin Management Plan as it explains the relevance of Source Protection Zones and how these contribute to achieving good status under the Water Framework Directive.	Impacts on Environment.
Catchment Abstraction Management Strategies, (CAMS) EA	CAMS provide current water availability for abstraction on a catchment by catchment basis, ensuring we safeguard water resources despite increasing pressures on water availability due to population growth and climate change.	Impacts on Environment.
Equalities Act 2010	Includes the requirement to protect the rights of individuals and to advance equality of opportunity for all.	Impacts on Equalities.
Equality and Human Rights Commission (EHRC) 2016, Is England Fairer? England's most disadvantaged groups: Gypsies, Travellers and Roma	This report summarises the findings on the the experiences of Gypsies, Travellers and Roma in relation to education, work and standard of living, health, prisons and stigmatising treatment. It promotes and enforces the laws that protect our rights to fairness, dignity and respect and is intended for use by policy makers.	Impacts on Gypsy and Travellers equalities.
EHRC 2016, Race report: Healing a divided Britain	Review into race inequality in Britain, providing comprehensive analysis and evidence on whether our society lives up to its promise to be fair to all its citizens.	Impacts on race inequalities.

Traveller Movement, 2016, Impact of insecure accommodation and the living environment on Gypsies' and Travellers' health	Presents findings of health of the most vulnerable members of society.	Impacts on health.
London		
The London Plan (March 2016)	Strategic policies for spatial planning and development across London to ensure the city develops in a sustainable manner.	General conformity with the London Plan.
London Boroughs' Gypsy and Traveller Accommodation Needs Assessment (March 2008)	Responds to the requirement placed on Local Authorities under the Housing Act 2004	Comply with legislation
The Mayor's Air Quality Strategy 2010 and Progress Report July 2015	Concentrates on policies to promote healthy living and sets out measures to tackle London's air quality problem.	Improve air quality.
The Mayor's Economic Development Strategy 2010	Sets out to encourage the expansion of opportunities for all its people and enterprises, achieving the highest environmental standards and quality of life.	Encourage sustainable economic growth.
The City of London's Biodiversity Action Plan 2010-2015	Sets policies and proposals to protect and care for London's biodiversity by encouraging the greening of the built environment and the use of open spaces in ecologically sensitive ways.	Protect and enhance biodiversity.
The Mayor's Cultural Strategy 2014	Sets out the Mayor's proposals for developing and promoting cultural life in London.	Ensure the enhancement of cultural and social growth.
London Climate Change Adaptation Strategy 2008	Presents adaptation measures to address climate change within London.	Reducing the impacts and adapting to the effects of climate change.
The Mayors Climate Change and Adaptation Strategy 2011	Sets out a framework for enhancing quality of life in London and protecting the environment.	Reduce the impact and adapt to the effects of climate change.
The Mayor's Transport Strategy 2010	Details priority areas for transport that directly or indirectly benefit the environment and the London community.	Reduce the need for car travel and encourage sustainable modes of transport.
Mayor of London's Municipal Waste Management Strategy 2011	Reduce London's waste generation by 2020 and sustainably manage the waste created.	Reduce waste generation.
Mayor's Ambient Noise Strategy 2004	Minimise the adverse impacts of noise on people living, working and visiting London, using the best available practises and technology.	Mitigation or avoidance of noise impacts.

The Mayor's Housing Strategy 2014	Raise aspirations and promote opportunity: by producing affordable homes, particularly for families, and by increasing opportunities for home ownership; Improve homes and transform neighbourhoods: by improving design quality, by greening homes, by promoting successful, strong and mixed communities and by tackling empty homes.	Quality and affordability of housing supply.
London Tree and Woodland Framework	Plant the right trees in the right places to enhance the environment and quality of life.	Protect and enhance trees.
Revised London View Management Framework SPG 2012	New development needs to comply with appropriate viewing corridors that are located both within and across the borough.	Maintain and enhance the quality of the townscape.
The London Rivers Action Plan	Restoration of rivers and implementation of London Plan Blue Ribbon policies.	River restoration, access to rivers, acknowledgement of the positive role rivers and river restoration play in biodiversity, climate change and flood risk management.
Mayor's Best Practice Guidance on Health Issues in Planning (2007)	BPG promotes the Mayor's statutory duty to promote the health of Londoners. The guide helps boroughs tackle health inequalities and promote healthy developments. Helps Local Authorities to meet their obligations to promote wellbeing in their boroughs.	Appraise health and seek to reduce health inequalities.
Mayor's Supplementary Guidance Sustainable Design and Construction 2014	The SPG seeks to ensure future developments meet the highest standards of sustainable design and construction.	The sustainable use of natural resources and reduced impact of climate change through energy efficient design and construction.
Mayor's Supplementary Guidance Accessible London: Achieving an inclusive environment 2014	The SPG seeks to ensure the promotion of an inclusive accessible environment	Accessibility for all and inclusivity.
Mayor's Supplementary Guidance Providing for Children and Young People's Play and Informal Recreation 2012	The SPG seeks to ensure the provision for children of free and accessible spaces offering high quality play opportunities.	Accessible open space and access for all.

Shaping Neighbourhoods: Character and Context 2014	The Mayor has published for public consultation draft Supplementary Planning Guidance on 'Shaping Neighbourhoods: Character and Context' to help with the implementation of policies in Chapter 7 of the 2011 London Plan, particularly Policies 7.4 on Local Character and 7.1 on Building London's Neighbourhoods and Communities.	Understand character and local context to identify how a place should develop.
London Planning Statement 2014	The Mayor has published for public consultation a draft 'London Planning Statement' as proposed London Plan Supplementary Planning Guidance. This is intended to fill the gap left by the Government's revocation of the former Government Office for London Circular 1/2008 by pulling together information about the Mayor's role in the London Planning system.	Propriety (in compliance with legal requirements regarding procedural fairness and propriety, and ensuring that decisions are properly based on relevant planning considerations); Promoting Sustainable Growth; and Viability (of development).
Housing in London March 2017	Housing in London is the evidence base for the Mayor's London Housing Strategy, summarising key patterns and trends across a wide range of topics relevant to housing in the capital. The Mayor formally adopted his London Housing Strategy in February 2010 and in December 2011 he consulted on proposals for a new Strategy.	Demographic pressures, housing affordability, the housing market, mobility and housing need, housing supply, decent housing, energy efficiency and fuel poverty.
All London Green Grid 2012	The All London Green Grid takes the principles of the East London Green Grid and applies them across London.	Integrated network of green and open spaces together with the Blue Ribbon Network of rivers and waterways.
London's Foundations 2012	Sets out London's geological heritage, explaining the process for identifying sites of geological importance and important geological sites for protection.	Impacts on heritage assets and the wider historic environment.
London Housing Supplementary Planning Guidance (March 2016)	This Supplementary Planning Guidance (SPG) provides guidance on the implementation of housing policies in the 2015 London Plan and the 2016 Minor Alterations to the Plan (MALP). It replaces the 2012 Housing SPG.	Demographic pressures, housing affordability, the housing market, housing need, housing supply, viability, social infrastructure and housing quality.

Homes for Londoners - Affordable Housing and Viability Supplementary Planning Guidance (August 2017)	This SPG focuses on affordable housing and viability. It includes four distinct parts: background and approach; the threshold approach to viability assessments; detailed guidance on viability assessments; and a specific approach to Build to Rent schemes.	Meet identified affordable housing need.
London Land for Industry and Transport Supplementary Planning Guidance (2012)	This Supplementary Planning Guidance provides guidance on the implementation of policies relating to land for industrial type activities and transport in the Mayor's London Plan published in July 2011.	Achieving accessibility for all.
London Social Infrastructure Supplementary Planning Guidance (2015)	This document contains guidance to support London Plan Policy 3.16 on the Protection and Enhancement of Social Infrastructure, as well as policies 3.17 Health and Social Care Facilities, 3.18 Education Facilities and 3.19 Sports Facilities. It particularly focuses on those elements of social infrastructure that face the biggest strategic challenges - specifically health, education, sport, faith and burials.	Impacts on social infrastructure and health.
Lewisham		
Lewisham Gypsy and Traveller Accommodation Needs Assessment (2015) as updated August 2016	The assessment identifies the need for the borough to accommodate 6 or more pitches for gypsies and travellers.	Meet identified housing need.
Lewisham Sustainable Community Strategy (SCS) 2008 -2028	The SCS sets out the vision for the borough up until 2020 and includes objectives to improve social, environmental and economic outcomes for the borough.	Improve social, environmental and economic outcomes for the borough.
Lewisham Core Strategy 2011	The Core Strategy provides the spatial planning framework for the borough and is underpinned by five strategic objectives: <ul style="list-style-type: none"> • Regeneration and growth areas; • Providing new homes; • Growing the local economy; • Environmental management; • Building a sustainable community. 	Avoid, and secondarily minimise and compensate for, any significant negative effects on the community, in social and economic terms, or the environment.

Community Safety Strategy 2012-2017 (SCS), Safer Lewisham Plan 2013-14	Sets out the results of the Strategic Assessment which identifies the key crime and disorder issues that face the borough, and the multi-agency actions that will be deployed to address them.	Reduce crime and the fear of crime.
Corporate Plan 2008-2011	The purpose of the Corporate Plan is to: <ul style="list-style-type: none"> • set out the Council's vision, values, strategic direction and key priorities for action up to 2009 and beyond; • outline the Council's contribution to the delivery of the SCS. 	Improve social, environmental and economic outcomes for the borough.
Lewisham Regeneration Strategy 2008-2020	The strategy details twelve objectives that relate to three broad themes - people, prosperity and place. The strategy complements the SCS.	Ensure the sustainable development of the borough.
Lewisham Housing Strategy 2015 -2020	Focuses on delivering the right housing mix to meet the housing needs and aspirations of all the borough's residents and achieving the wider goals expressed within the SCS.	Provide sufficient housing of appropriate quality, mix and tenure.
Lewisham River Corridor Improvement Plan (2015)	Provides guidance relating to rivers in Lewisham.	The Council seeks to secure high quality development along the river corridors.
Lewisham Municipal Waste Strategy	The Strategy aims to minimise Lewisham's annual growth in waste.	Minimise growth in waste.
Lewisham Children and Young People's Plan 2012 - 2015	The Plan focuses on implementing actions to improve a number of key outcomes for children and young people which will improve their lives and life chances.	Improve life outcomes for residents –promotion of education, employment, housing and leisure and community facilities.
Lewisham Carbon Reduction and Climate Change Strategy 2008	The Strategy is based on achieving a lasting and sustained decrease in emissions of CO2 working with strategic partners and with citizens to: <ul style="list-style-type: none"> • reduce demand for energy; • increase energy efficiency; • increase the use of renewable energy; • tackle fuel poverty. 	Reduce the borough's carbon footprint.

Social Inclusion Strategy 2005-13	This strategy centres around five broad themes. It identifies the links between the council's existing strategies and services to enable more joined-up working.	Promote social inclusion, improve urban design, transport and education, and promote health and well-being in the borough.
Healthier Communities – A health and well-being framework for Lewisham (Draft 2007 – 2010)	The Strategy seeks to improve the health outcomes for Lewisham residents by adopting preventative measures and other innovative approaches.	Enhance the health levels in the borough.
Lewisham Leisure and Open Space Study 2010	This strategy aims to provide: <ul style="list-style-type: none"> • A review of outdoor sport and recreation; • a borough playing pitch strategy; • an implementation plan and prioritised investment; • Plan for the Playing Pitch Strategy. 	Protect and maintain open spaces and biodiversity across the borough.
Local Biodiversity Action Plan – A Natural Renaissance For Lewisham 2006 -2011	The key objective is the protection and enhancement of areas suitable for wildlife in the borough and to increase citizens' access to nature, even in urban areas.	Primarily avoid, and secondarily minimise and compensate for, any significant negative effects upon biodiversity.
Comprehensive Equalities Scheme 2016-2020	Provides a set of equality objectives and a framework to assess and evaluate the equality impact of strategic planning.	Enables the Council to demonstrate its compliance with the Equality Act 2010
Better futures: Lewisham's Homelessness Prevention Strategy 2009-2014	The Strategy complements the objectives of the Lewisham Housing Strategy and seeks to prevent homelessness by providing long term and sustainable housing and promoting opportunities and independence for people in housing need by improving access to childcare, health, education, training and employment.	Ensure measures providing sufficient housing of appropriate quality, mix and tenure and improve access to, and opportunities for, childcare, health, education, training and employment are integrated.
Lewisham Borough Sports Plan 2010-13	The Strategy provides a vision for sport to increase opportunities to participate in sport at all levels and for all ages	Enhancing the health wellbeing levels in the borough.

Lewisham Local Air Quality Action Plan 2008	The key aim is to bring about change to reduce emissions (NO2 and PM10) from main source of pollution (road transport) in a cost-effective and proportionate way through Area Quality Management Areas (AQMA) with designated geographical boundaries.	Improve air quality. Promote land uses and activities with minimal impacts on air quality.
Lewisham Strategic Flood Risk Assessment 2008	The study identifies and provides advice to the Council on the suitability of development in areas at varying risks of flooding across the borough.	Minimise and mitigate the risk of flooding in the borough.
Lewisham Strategic Flood Risk Assessment Update (2015)	Updates previous study.	Updates previous study.
Lewisham Flood Risk and Development Sequential Test 2009	The sequential test identifies potential development sites and steers development to areas at lowest flood risk. Where there are no reasonable alternative sites in an area of lower flood risk, authorities must ensure that measures are incorporated that render the proposed development's vulnerability to flooding appropriate to the probability of flooding in the area.	Minimise and mitigate the risk of flooding in the borough.
Lewisham Surface Water Management Plan (April 2011)	This plan outlines the surface water flood risk in Lewisham and establishes a long term action plan for the management of surface water in the Borough.	Minimise and mitigate the risk of surface water flooding in the borough.
Lewisham Local Implementation Plan (Transport) 2010 (LIP)	The LIP is a statutory plan to implement the London Mayor's Transport Strategy.	Seek a reduction car travel and increase sustainable transport.
Lewisham Local Implementation Plan 2011 to 2031	The Local Implementation Plan (LIP) is the borough's transport plan, detailing its policies and programme for delivering the Mayor's Transport Strategy (MTS) within Lewisham.	Improving the existing transport network.
Lewisham Employment Land Study 2015	The ELS assesses the quantity, quality and viability of the borough's employment land to form an evidence base to support the review of policies and preparation of Lewisham Local Plan.	Informs the new Local Plan.

Lewisham Infrastructure Delivery Plan – Framework Document 2015	Lewisham’s Infrastructure Delivery Plan (IDP) was published in August 2010 as a ‘living document’ to be monitored and revised as necessary and supported the submission version of the Lewisham Core Strategy (October 2010).	Provides guidance on infrastructure delivery for the borough.
Lewisham Local Plan Regulation 18 Document – Consultation on Main Issues	This initial round of consultation notifies interested people about the Council’s intention to produce a new Lewisham Local Plan.	Updates previous Local Plan.
Lewisham Strategic Housing Market Assessment 2008 and the South East London Sub-regional SHMA 2009	The SHMA assesses housing provision and need within the borough and the five south east London boroughs. It outlines recommendations for the level of affordable housing and tenure mix, and identifies areas as well as specific groups within the borough and sub-region who may have different housing requirements.	Seek to facilitate housing provision, including its mix and tenure, and to ensure decent homes for all.
Health, Well-Being and Care – Lewisham Joint Strategic Needs Assessment (JSNA) 2009	A joint collaboration between the Council and Lewisham Primary Care Trust (PCT). The JSNA identifies key themes for action aimed at improving long-term health and influence the long-term commissioning priorities of health infrastructure providers in the borough.	Seek to improve the health and well-being of the borough’s residents.
Lewisham Conservation Area Management Plans	Provides guidance for the management of the borough’s conservation areas.	Impacts on heritage assets and the wider historic environment.
Lewisham Borough Wide Character Study 2010	The character study provides a description of the physical form of the borough, its origins, places, streets and buildings to provide an understanding of the particular attributes of the London Borough of Lewisham.	Impacts on the character of the borough.
Creative Lewisham – Lewisham Cultural and Urban Development Commission 2009 - 2013	Vision of Lewisham as a visually exciting, creative and imaginative hub, with a synthesis between urban design, arts, culture and the economy.	Promote a vibrant and dynamic borough.
Equality Analysis Revised Statement of Community Involvement (SCI) v.1 draft – 3 August 2016	The document sets out the draft Equalities Analysis of the Revised Statement of Community Involvement (SCI).	Seeks to implement changes to the services budget.

Hatcham Conservation Area Character Appraisal (2006)	This character appraisal provides an assessment and definition of Hatcham's special historic and architectural interest	Seeks to ensure new development is in keeping and respects the conservation area.
Culverley Green Conservation Area Character Appraisal (2001)	This appraisal document provides an assessment and definition of Culverley Green's special historic and architectural interest.	Provides information on ensure new development is in keeping and respects the conservation area.

Appendix B
Baseline Information

1. Climate

Carbon emissions and energy consumption

There is a consensus among experts that human activities are contributing to climate change through the release of greenhouse gases into the atmosphere. This has implications for the way we use and manage resources, particularly the future supply, availability and use of energy. The built environment, and the way people use their environment, contributes to greenhouse gas emissions and therefore sustainable development plays a critical role in tackling climate change. The full effects of climate change are unknown but climate risks which are expected to intensify in London over the coming decades include flooding, higher and unseasonal temperatures, urban heat island effect and limited water resources including drought, all impacting our quality of life.¹

A significant contributor to climate change is the concentration of carbon dioxide (CO₂) in the atmosphere. According to the Department for Energy and Climate Change (2011) the total CO₂ emissions for Lewisham between 2005 and 2009 are reducing annually and the per capita reduction rate is at 17.4% since 2005. This is shown on Table A1. The figure exceeds the target of 8.5% set by the Council. The total CO₂ emission in Lewisham is 998,000 tonnes and contributed 2.35% of London's total CO₂ emissions. The largest source of emissions is from the domestic sector followed by road transport. At just 3.8 tonnes per person, Lewisham has the lowest per capita carbon emissions in inner London, the second lowest in the capital as a whole (after Redbridge) and the fourth lowest in the UK. There has been a decrease in London's per capita emissions falling by 12.7% from 6.3 tonnes person to 5.5 tonnes.

Annual CO₂ emissions (tonnes) in Lewisham 2005 to 2009

Lewisham	Industry and commercial	Domestic	Road Transport	Total	Population ('000s, mid-year estimate)	Per capita emissions (t)	Per capita reduction since 2005 (%)
2005	315	581	282	1,180	254	4.6	17.4
2006	316	572	277	1,166	257	4.5	
2007	306	556	278	1,141	259	4.4	
2008	264	556	267	1,088	262	4.2	
2009	239	500	258	998	265	3.8	

Source: DECC, 2011

Annual CO₂ emissions (tonnes) in Greater London 2005 to 2009

Greater London	Industry and commercial	Domestic	Road transport	Total	Population ('000s, mid-year estimate)	Per capita emissions (t)	Per capita reduction since 2005 (%)
2005	20,389	17,291	9,239	46,966	7,485	6.3	12.7
2006	21,738	17,193	9,114	48,089	7,547	6.4	
2007	20,977	16,807	9,050	46,876	7,602	6.2	
2008	21,157	16,865	8,664	46,726	7,668	6.1	
2009	18,752	15,232	8,419	42,441	7,753	5.5	

Source: DECC, 2011

¹ Where temperatures in urban areas, particularly at night are warmer than non-urban areas

The GLA notes that by far the largest contributor to domestic emissions is space heating and cooling, which produce three times as many emissions as either water heating or appliances, and ten times as many as lighting.² It also notes that the domestic sector could contribute 39% of the total savings of 20 million tonnes of CO₂ identified in the London Climate Change Adaptation Strategy. Improving housing standards, insulation and energy efficiency, and providing sustainable decentralised energy can all contribute to reducing emission levels.

The emissions for Lewisham reflect its small industrial and commercial base and predominantly residential character with older properties, and its limited Underground services. It also notes that the domestic sector could contribute 39% of the total savings of 20 million tonnes of CO₂ identified in the London Climate Change Adaptation Strategy. Improving housing standards, insulation and energy efficiency, and providing sustainable decentralised energy can all contribute to reducing emission levels. The percentage of homes that do not meet decent homes standards in the borough is reducing; however there is still a need to improve this.

The Council is proactively working to address climate change issues. The borough was awarded Beacon Status in 2005/06 for work on sustainable energy and has a wide variety of programmes aimed at energy efficiency and reducing CO₂ emissions. To implement its goals the Council has a Corporate Sustainability Board and in July 2008 published a Carbon Reduction and Climate Change Strategy to ensure it leads by example on energy efficiency. The Council's ambition is for Lewisham to play a leading role in responding to climate change locally, regionally and nationally with the aim of achieving the lowest amount per capita CO₂ emissions in London. Any future residential development will need to meet Code for Sustainable Homes Level 4 or higher. Level 4 will provide greater energy efficiency (heating and cooling) as well as water efficiency features to improve biodiversity such as a green/living roof.

Section 3.4 of the London Borough of Lewisham Renewable Evidence Base Study³ states the existing renewable energy capacity in Lewisham. A review of the Ofgem Renewables and CHP Register⁴ showed that out of over 2000 facilities for renewable energy none of them are located in the London Borough of Lewisham. Although there are no major renewable energy facilities currently in the borough there may be some standalone renewable installations that provide renewable energy on a small scale.

2. Air

There are five air quality management areas (AQMAs) in the borough, located where the level of pollutants is higher than the acceptable threshold. National Air Quality Objective (NAQO) for nitrogen dioxide (NO₂) is set at 40µg/m³ as an annual average. In urban areas, this is the most difficult target to meet. Road traffic is the main source of air pollution in the borough. Excessive road traffic, which affects areas of poor air quality, is considered to be one of the main modern 'environmental stress' factors.

² Housing in London: The Evidence Base for the Mayor's Housing Strategy, September 2014

³ London Borough of Lewisham Renewable Evidence Base Study 2010

⁴ Ofgem, "Ofgem Renewables and CHP Register",

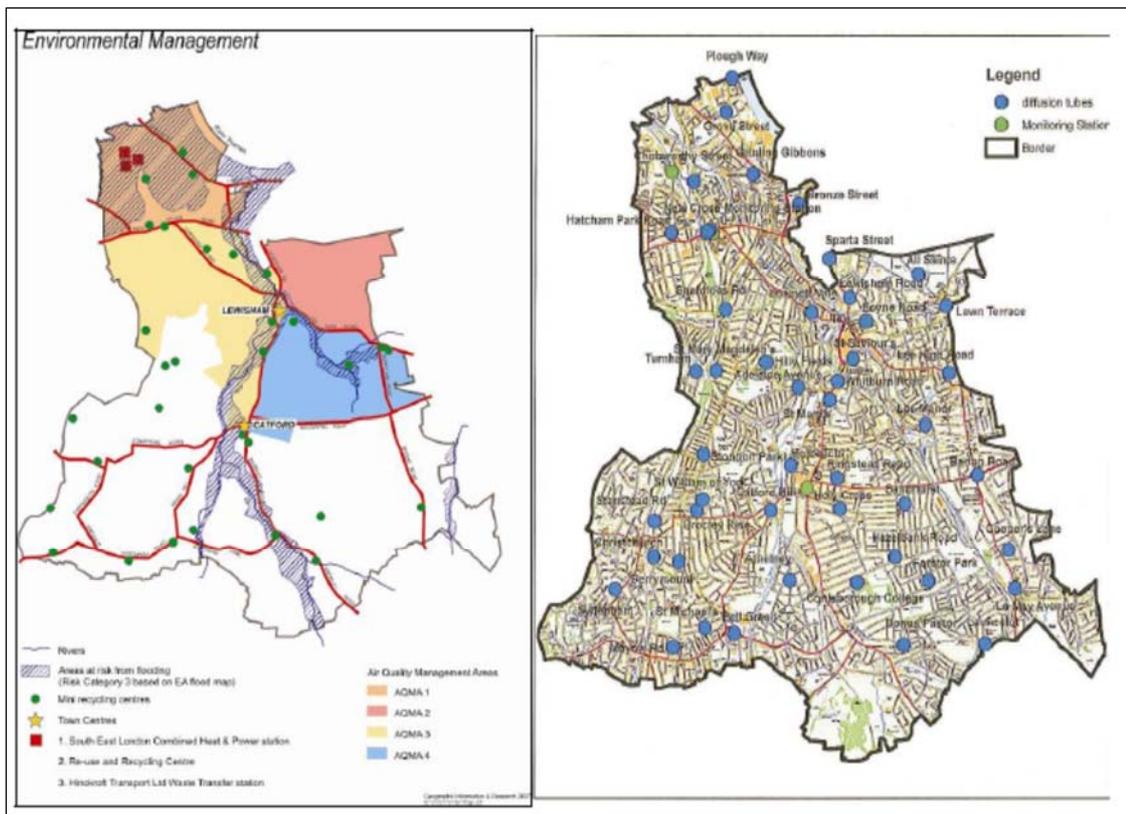
<http://www.ofgem.gov.uk/Sustainability/Environment/RCHPreg/Pages/RCHPreg.aspx>

Exposure to higher levels than $40\mu\text{g}/\text{m}^3$ is most likely to affect those who have a pre-existing respiratory illness as it causes irritation of the nose, throat and airways. However, the objectives do not necessarily represent 'safe' levels and it is agreed that authorities should continue to work to improve air quality and not just aim to meet the targets.

The borough's air quality will remain an important issue that needs to be addressed. The Council adopted an Air Quality Action Plan in 2008. The focus of which is mainly concerned with reducing emissions from road transport, with an emphasis on balancing supply side measures, such as improved walking, cycling and public transport, and demand side management, such as traffic restraint and regulation. The implementation of the London Low Emission Zone is expected to have the highest benefit in improving air quality within Lewisham AQMAs.

The Council's fourth review and assessment (Updating and Screening Assessment) of air quality was conducted in June 2009. There is a risk of the annual mean objective being exceeded for nitrogen dioxide and for particles PM10. The Detailed Assessment concluded that the Council should maintain the designated AQMAs and continue the programme of monitoring which was expanded in 2010 to measure PM10 in a location where fugitive sources were believed to be an issue.⁵

Air Quality Management Areas in Lewisham and Monitoring Stations



⁵ Air Quality Action Plan 2008

3. Biodiversity, flora and fauna

Lewisham's natural heritage has helped shape the borough's development and continues to be a reason why people choose to live and work here. Names such as Lee Green, Grove Park and Forest Hill give an idea of the landscape from which Lewisham developed. Today the borough is characterised by a wide variety of green spaces and natural features that provide places for people to enjoy, such as New Cross Gate Cutting, Blackheath, the River Ravensbourne, Beckenham Place Park and Hilly Fields.

Lewisham has more than 560 hectares of green space (about 14% of the area of the borough), with 46 public parks covering about 370 hectares of land. Lewisham is one of the greenest parts of south-east London with over a fifth of the borough being parkland or open space.⁶ Areas of parkland and open space play an important environmental role, contributing to biodiversity within the borough.

The Stag Beetle is the largest beetle in the UK, is threatened at the global level and has undergone significant decline in the past 40 years. Recent surveys indicate south London is a national hotspot and in Lewisham they can be found throughout the borough. They require suitable dead wood for their survival and management of this resource is a key priority for land managers.

Within the borough of Lewisham there are 60 sites designated as Sites of Nature Conservation Importance (SNCI) including 19 Local Nature Reserves (LNR). In addition, the council has 21 nature conservation areas directly under ecological management, each with its own unique features.⁷ The River Thames and other waterways, private garden areas, and railway line-sides also provide valuable habitats for wildlife in the borough.⁸

4. Soil

The solid geology of Lewisham is predominantly marine London Clay in the central and southern sections of the borough, with a pocket of Lambeth Group clay in the south and a number of pockets in the north. Towards the north of the borough there are also pockets of chalk (Upper Chalk and Chalk Group) and sand (Thanet Sand Formation). In the north east and south / south eastern sections of the borough there are also pockets of Harwich Formation sand and gravels.⁹

The drift deposits are concentrated in the north and central sections of the borough, with alluvium in the vicinity of the River Thames and along the River Ravensbourne valley. Gravels of the Kempton Park Gravel Formation can generally be found adjacent to the alluvial deposits. In addition, there is a pocket of Langley Silt

⁶ Lewisham Leisure and Open Space Study 2010

⁷ Core Strategy 2011

⁸ Core Strategy 2011

⁹ London Borough of Lewisham, 2010: Contaminated Land Inspection Strategy, prepared by the Environmental Protection Group.

Formation deposits in the north west of the borough and pockets of Head (Clay) in the south of the borough.¹⁰ The borough is characterised by slowly permeable soils which are seasonally wet and slightly acid but base rich loamy and clayey in texture. Along the river corridors, and specifically in the locality of Catford town centre, the soils are loamy with naturally high groundwater.¹¹

There are currently no entries recorded in Lewisham's Contaminated Land Register.¹² This should not however, be interpreted that the land is necessarily free of contamination.

5. Water

Flood zones

The London Borough of Lewisham has some land within flood zones 2 and 3. Flood zone 2 represents the 1 in 1000 year probability of flooding, and flood zone 3 represents the 1 in 100 year probability of flooding. The area of land within flood zones 2 and 3 is predominantly around in the North of the Borough, where the risk is tidal flooding from the Thames. Other areas include the land around the river Ravensbourne and river Pool, extending to the south of the Borough and the Quaggy, extending towards the east of the Borough. In Lewisham there are approximately 21,752 properties at risk of flooding from river and tidal sources. This equates to 16% of all properties in the Borough. For the properties at risk of flooding, 8% are classified as having a significant likelihood of flooding, compared to 83% which are classified as having a low likelihood of flooding. The remainder have a moderate likelihood of flooding. Potential risk of flooding from other (non river related) sources also exists including possible sewer surcharging and surface water flooding as a result of heavy rainfall and/or blocked gullies. With changing climate patterns, it is expected that intense storms will become increasingly common and those properties (and areas) that are currently at risk of flooding may be susceptible to more frequent, more severe flooding in future years.¹³

Water Framework Directives

The Water Framework Directive is European legislation designed to protect and enhance the quality of our rivers, lakes, streams, groundwater, estuaries and coastal waters, with a particular focus on ecology. The Environment Agency is the lead authority on the WFD in England and Wales. We are required to plan and deliver actions that will improve our water environment. There are three watercourses in Lewisham designated under the WFD, The River Pool, Quaggy and Ravensbourne. Under the WFD, these need to achieve good ecological potential by 2027. A programme of measures to improve the status is being developed. This will include a series of measures to address urban diffuse pollution in some parts of London, in order to achieve the 'good' ecological status required for the Directive.

¹⁰ Contaminated Land Inspection Strategy, 2010.

¹¹ National Soil Resources Institute (NSRI) Soilscales website <http://www.cranfield.ac.uk/sas/nsri/>

¹² Lewisham Borough Council website: www.lewisham.gov.uk

¹³ SFRA 2008

Water Quality: Chemical Water Quality

The only watercourse in the Borough currently designated under the chemical General Quality Assessment (GQA) is the section of the River Ravensbourne between the River Pool and the Tideway. New chemical GQA calculations have been introduced under which biological oxygen demand has been removed as one of the parameters. This means the calculation is now based on ammonia and dissolved oxygen levels to grade each river reach. Using this method, the chemical quality has consistently been found to be very good, having achieved a grade A every year between 2000 and 2009. There has been a reduction in the size of the GQA network over the last few years. The River Quaggy and the River Pool were designated up until 2006. The quality of the River Quaggy was good, with the reach achieving a grade B on average. The quality of the River Pool was only fairly good, as it predominantly achieved a grade C.

The River Quaggy and River Ravensbourne merge in Lewisham town centre, and these rivers have quite similar catchments. Unusually there are no major point sources of pollution in these urban rivers, and water quality issues (principally related to nutrients) arise from diffuse urban sources such as road runoff and missed connections, where domestic sewerage is wrongly connected to pipes intended for surface water runoff. As a result, water quality is very variable, and can be good during periods of dry weather.

Householder Water Use

All of Lewisham falls in Thames Water's London resource zone, where average consumption in 2009-10 was 167 litres per person per day.¹⁴ This compares to the five year average for the Borough of 160.4 litres consumed per person per day between 2005/06 and 2009/10. This water resource zone (WRZ) is seriously water stressed. The Government has set a target for households to achieve 130 litres per person per day, which will require changes to consumption patterns in order to meet it. Through the Code for Sustainable Homes, any future residential development in Lewisham will need to meet Code for Sustainable Homes Level 4. Level 4 will provide greater water efficiency features to encourage sustainable consumption of drinking water within buildings and external watering/irrigation.

¹⁴ Thames Water, 2010. Thames Water revised Water Resources Management Plan. [online] (Updated 2010) Available at: <http://www.thameswater.co.uk/cps/rde/xchg/corp/hs.xsl/5392.htm>

6. Population, human health and equality

Population

The population of the London Borough of Lewisham was 275,885 at the 2011 census. The population of Lewisham grew by 3% between 2001 and 2011. It is forecast to increase by almost a quarter (64,300) between 2006 and 2031.¹⁵ Children and young people (0 to 19 years) make up over a quarter of the population, one of the highest proportions in London.¹⁶ Elderly residents (over 75 years) make up just 5%. The average age of our population is 34.7 years and is young when compared with other London boroughs. Population growth and an increase in the number of households is expected to be concentrated within the Evelyn, New Cross and Lewisham Central wards. This is due in part to the major development and regeneration plans such as Convoys Wharf and within the Lewisham Town Centre. In terms of life expectancy for the borough's population, between 2005 and 2007 the average life expectancy at birth for men in Lewisham was 76 years, compared with 77.3 years in England; and over the same period the life expectancy for women was 80.8 years in Lewisham compared with 81.5 years in England.¹⁷ The population was more or less evenly split between males and females and these proportions are not expected to change in the period to 2014.¹⁸

There was a growth in all groups of the black and minority ethnic (BME) population between the 2001 and the 2011 Census. This has risen from 39% of households to 58.5%, who largely live in the northern and central parts of the borough.¹⁹ The general level of health of people in Lewisham is significantly poorer than the health of people in the rest of England. Some indicators of poor health are specifically related to low income such as coronary heart disease, cancer and respiratory disease. Reducing premature mortality from circulatory diseases and cancer remain priorities for Lewisham.²⁰

The 2011 Census explored characteristics of the Gypsy and Traveller Community for the first time. It established that 58,000 people identify themselves as a Gypsy or Irish Traveller, this equates to 0.1% of the usual resident population of England and Wales. People identifying as Gypsy or Traveller included 39% of residents under 20, compared to 24% of the overall England and Wales population under 20. Gypsy or Traveller was the ethnic group with the lowest proportion of respondents who were economically active at 47%. The Census found that the ethnic group were more than twice as likely to live in social housing than the overall population of England and Wales. Gypsy and Travellers had the lowest proportion of any ethnic group rating their general health as 'good' or 'very good' at 70% compared to 81% of the overall population for England and Wales. According to the 2011 census there are 93 Gypsy and Travellers in bricks and mortar accommodation in Lewisham.

¹⁵ Greater London Authority 2008 Round of Demographic Projections, RLP High

¹⁶ Census 2011

¹⁷ JSNA, NHS London

¹⁸ Male 49% and female 51%.

¹⁹ BME population estimated at 49.4% of households as evidenced through the Lewisham Household Survey 2007 for the Strategic Housing Market Assessment (SHMA)

²⁰ Joint Strategic Needs Assessment (JSNA), NHS Lewisham

The Index of Deprivation 2015 ranked Lewisham as the 19th most deprived area in the UK that affects children and older people. It also states the population for Lewisham has increased since the census and is now 293,100²¹. Lewisham is within the 20% most deprived Local Authorities in the country. In 2010 Lewisham was ranked the 31st most deprived Local Authority. Although the recent ranking is lower than in the 2010 Index of Deprivation, a number of local authorities that were previously within the 20% most deprived nationally are no longer in existence. The Index of Deprivation looks at a range of indicators covering income, employment, health, education, training, skills, living conditions and access to services.

In the 2015 Index of Deprivation of Lewisham's 166 LSOAs 40% were in the 20% most deprived in England, compared with 38% in 2007. Only five of these LSOAs were within the worst 10% (this is the same as in the 2010 ID); they are dispersed across the wards of Bellingham, Evelyn, Lewisham Central, Rushey Green and Whitefoot. However, 58 of Lewisham's LSOAs were in the bottom 10-20% (up two from 2007); making a total of 63 LSOAs in the bottom 20%.

With nearly 40% of Lewisham's LSOAs in the bottom 20%, and almost all of the remaining LSOAs being in the bottom 50%, the ID results again suggest that Lewisham faces some significant challenges. Care must be taken not to assume that 'less deprived' means 'wealthier' as the indices measure only levels of deprivation, not affluence. In addition, it is important to recognise that even in LSOAs with little deprivation there may be individuals and families experiencing deprivation. These people will also need to access support and services aimed at tackling deprivation.

Health

There are many healthcare facilities in Lewisham. There are a vast array of health services incorporating the needs of the population. The main health care services in Lewisham are community services as well as a university hospital and several mental health centres²².

The following list details these:

Southbrook Road Community Mental Health Centre – 1 Southbrook Road, Lee

Speedwell Mental Health Centre – Speedwell Street

Cygnets Lodge Lewisham – Lewisham Park

University Hospital Lewisham – High Street, SE13 6LH

Burgess Park – Unit 2, Burgess Park Industrial Estate, SE5 7TG

Downham Health and Leisure Centre – 7-9 Moorside Road, Downham, BR1 5EP

Primary Care Centre Hawstead Road - Primary Care Centre, Hawstead Road, Catford, SE6 4JH

Honor Oak Health Centre - 20 Turnham Road, Honor Oak Rd, SE4 2HH

Ivy House - Bradgate Road, Catford, SE6 4TT

²¹ London Datastore <http://londondatastore-upload.s3.amazonaws.com/instant-atlas/ward-profiles.html/atlas.html>

²² <https://www.lewishamandgreenwich.nhs.uk/contact-community-sites-in-lewisham/>

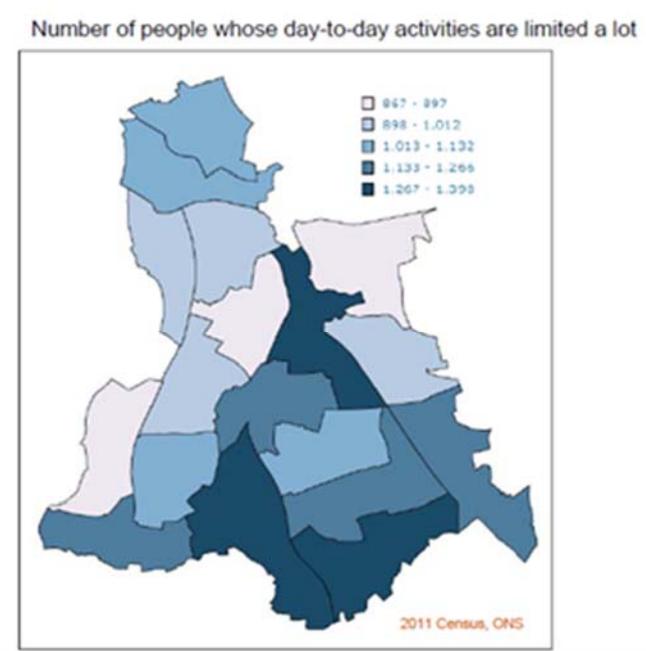
Kaleidoscope - 32 Rushey Green, Catford, SE6 4JF
 Jenner Health Centre - 201-3 Stanstead Road, Forest Hill, SE23 1HU
 Lee Health Centre - 2 Handen Road, Lee, SE12 8NP
 Marvels Lane Health Centre - 37 Marvels Lane, Grove Park, SE12 9PN
 South Lewisham Health Centre - 50 Conisborough Crescent, Bellingham, SE6 2SP
 Sydenham Green Health Centre - 26 Holmshaw Close, Sydenham, SE26 4TH
 Waldron Health Centre - Amersham Vale, New Cross, SE14 6LD

Equality

The 2011 Census indicates 14.4% of the Lewisham population (39,735) had a limiting long-term illness. Of these, 7.3% of people (19,523) indicated their daily activities were limited a lot. Analysis by Public Health England for its learning disability profiles indicates that Lewisham has average numbers of learning disabled people (16-64) known to the Council (four per 1000).

Analysis of Lewisham's recent residents survey found that less than half of disabled residents (48%) were confident that their local community would be able to help if a service in their local area was under threat, compared to two-thirds of nondisabled residents (66%).

The figure below shows long term health problems or disabilities in Lewisham (Census 2011).



The census categories used for mapping are broad (essentially white/non-white) and mask high levels of local diversity as well as differing national and cultural origins. The largest combined ethnic group in the borough is categorised in the census as White; English/Welsh/Scottish/Northern Irish/British. There was a growth in all groups of the black and minority ethnic (BME) population between the 2001 and 2011 Census. This

has risen from 39% of households to 58.5%, who largely live in the northern and central parts of the borough.

Christianity is the most populous religion of Lewisham residents, particularly in the south of the borough. Between 2001 and 2011, the percentage of people citing Christianity as their religion declined by 8.4%, from 61.2% to 52.8%. Over a quarter of residents stated that they have no religion and this increases to a third of residents in Blackheath, Brockley, Crofton Park, Forest Hill and Telegraph Hill.²³

7. Material assets

Homes

Continuous growth in population and high demand for housing and affordability

The population is forecast to rise. The Mayor of London requires 10,050 new residential units to be built in Lewisham by 2021. The average income of the majority of households is insufficient to buy a house. The SE London and Lewisham Strategic Housing Market Assessments highlight that access to affordable housing remains an issue throughout the borough. Based on the GLA Housing Price 2008 data, the housing price in Lewisham has increased steadily over the last five years. However, it is still lower than the London average price (£249,789 compared to £297,785).²⁴ This is particularly relevant given that the Lewisham Household Survey for the SHMA asked a question about household income. This included gross household income from all sources such as earnings, pensions, interest on savings, rent from property and state benefits. While just under a fifth of households have an income of over £40,000, however nearly half of all households have an income of less than £15,000.²⁵

Existing dwelling stock

Of the total dwelling stock, 54% of properties in Lewisham are flats of which nearly half are converted dwellings rather than purpose built. Of the remainder 34% are terraced houses and 12% are detached or semi-detached.²⁶ In terms of bedroom size, 27% of properties are 1 bedroom, 33% 2 bedroom and 30% 3 bedroom. This leaves 10% with 4 or more bedrooms.

A dramatic change has taken place in the tenure of property in the London borough of Lewisham in the past few years. This provides a roughly equal tenure split between private rent, social rent and private ownership. It is considered that the increase in the private rented sector is a result of the buy-to-let market in recent years. The amount of private rented properties has increased from 14.3% in 2001 to 24.3% in 2011. Conversely social rented properties have fallen from 35.6% in 2001 to 31.1% in 2011, while properties owned outright or with a mortgage have decreased from 50% in 2001 to 42.4% in 2011.²⁷

²³ Lewisham's Comprehensive Equalities Scheme 2016-2020

²⁴ Land Registry, March 2009

²⁵ 48%

²⁶ Lewisham Household Survey 2007, SHMA 2014

²⁷ Lewisham Household Survey 2007, SHMA 2014, 2011 Census

A total of 33,922 households were assessed as living in unsuitable housing due to one or more factors.²⁸ The largest reason was overcrowding (11,482 households), and major disrepair or unfitness (10,641); followed by support needs, accommodation too expensive and sharing facilities (6,151, 5,263, and 4,487 respectively). Deptford is one area in the borough most likely to contain unsuitably housed households which corresponds to areas identified with higher levels of deprivation.²⁹

Affordable Housing

Lewisham's housing strategy, Homes for future³⁰, states that the council aims to deliver 11,000 homes by 2020 of which up to 50% will be affordable housing with the aim to reduce homelessness and the number of households in temporary accommodation and also to enable people on low and modest incomes to afford their own home. The tenure mix of affordable housing is agreed on an individual basis, it takes into consideration the existing housing mix and character as well as the demand in the area for affordable housing.

8. Cultural heritage

The complex historical development of the borough has left a legacy of distinctive neighbourhoods. In acknowledgement of this distinctive heritage a substantial portion of the borough is identified as an Archaeological Priority Area. An archaeological priority area is an area specified by Local Planning Authorities to help protect archaeological remains that might be affected by development. This means that any redevelopment in these areas that might reveal remains of interest will be required to undertake an assessment and preservation in accordance with advice from English Heritage.

Today the borough is characterised by a wide variety of green spaces and natural features that provide places for people to enjoy, such as New Cross Gate Cutting, Blackheath, the River Ravensbourne, Beckenham Place Park and Hilly Fields. These open spaces have historic significance and give the borough a distinct identity. They are an essential component of many heritage assets. For example, the open character of Blackheath is an integral element of the Blackheath Conservation Area and a supporting element to the outstanding universal value of the Maritime Greenwich World Heritage Site. The small area of open space within the Culverley Green Conservation Area provides a welcome element of informality to the grid pattern of tree lined streets.

Lewisham has around 27 conservation areas covering 707 ha of the borough, around 540 nationally-listed buildings, over 200 Locally Listed buildings, 2 Registered Parks and Gardens, 21 areas of Archaeological Priority and 1 Scheduled Ancient Monument. Lewisham's open spaces also have historic significance and give the borough a distinct identity. They are an essential component of many heritage assets.

²⁸ Lewisham Household Survey 2007, SHMA 2014, 2011 Census

²⁹ Lewisham Household Survey 2007, SHMA 2014, 2011 Census

³⁰ 'Homes for the future: raising aspirations, creating choice and meeting need' Lewisham's Housing Strategy 2009-2014

9. Landscape

The borough of Lewisham is primarily residential in nature, characterised by 20th century suburbs in the south to older Victorian neighbourhoods in the north. These extensive areas of housing are punctuated with a network of small and large town centres, local shopping parades, employment areas of varying quality and job density, many parks and green spaces, and railway corridors, and are overlaid by a range of heritage assets.

The borough is characterised by a wide variety of green spaces and natural features that provide places for people to enjoy, such as New Cross Gate Cutting, Blackheath, the River Ravensbourne, Beckenham Place Park and Hilly Fields. In fact, Lewisham has more than 560 hectares of green space (about 14% of the area of the borough), with 46 public parks covering about 370 hectares of land. These areas play an important environmental and recreational role as well as defining and continuing to contribute to Lewisham's overall character.

Lewisham is located within the London Basin Natural Area³¹ and is defined by an urban / suburban land use according to the Dudley Stamp Land Use inventory.³² The landscape character of the borough is focused around the Ravensbourne, Quaggy and Pool rivers which flow into Deptford Creek. Elevated views play a significant role in the character of the area. There is a general gradient of development across the borough from oldest in the north to more modern in the south. As London has grown, the borough has seen successive rounds of urbanisation moving south across the borough.³³

Lewisham also has 37 allotment sites which are very popular with local residents. Because of the current interest in healthy, outdoor living and organic food, all of the sites have waiting lists. No areas within the borough are designated as Greenbelt land. Of the 37 allotment sites within the borough, one relatively small allotment can be found in the Rushey Green ward at the Weavers Estate (0.42 ha).

Compared to a city average of 41%, only 23% of land in the borough of Lewisham is green space or water. Despite having 560 ha of green space, parts of the borough are considered to be deficient in open space, and with increasing pressures to build, the borough aspires to protect all its green space.³⁴

10. Waste

Lewisham is a unitary waste authority. Over 80% of Lewisham's waste is diverted away from landfill by incinerating it as the South East London Combined Heat and Power Station (SELCHP), which recovers power to supply to the National Grid. Of the borough's total waste for 2010/11 only 6% was sent to landfill. The borough incinerates 76% of its household waste. Lewisham has on the other hand the lowest recycling and composting rate in London in 2009/10. The overall household recycling and composting rate in Lewisham has steadily between 2000/01 and 2007/08.

³¹ English Nature, 1997: London Basin Natural Area Profile

³² www.magic.gov.uk

³³ Lewisham Borough Council, May 2011: Development Management Local Plan Sustainability Appraisal Scoping Report

³⁴ Lewisham Borough Council, May 2011: Development Management Local Plan Sustainability Appraisal Scoping Report

However, the rate has since declined. The current recycling and composting rate is almost 15% lower than the London total rate of 31.8%.³⁵

The Council aims to increase household recycling / composting and in 2010/11 has set a target to recycle compost or reuse 25% of its household waste. Further, targets have been set to landfill 8% of municipal waste by 2010/11 and to reduce household waste per household to 716kg in 2010/11.³⁶ There is a projected waste growth of 3% per annum, which means that disposing of this increasing amount and variety of waste will become increasingly difficult. Every borough is allocated an apportionment of waste in the London Plan that they must dispose of using appropriate facilities. For Lewisham this equates to approximately 208,000 tonnes in 2010, increasing to 323,000 tonnes by 2020.³⁷ Provision in the borough exceeds this level with the South East London Combined Heat and Power Station (SELCHP) in Deptford capable of handling 488,000 tonnes alone. Further facilities in Lewisham are capable of dealing with over 200,000 tonnes and provide support to other boroughs in the south-east region of London.³⁸

³⁵ Department for Environment, Food and Rural Affairs (Defra), 2013. Municipal Waste Management Statistics. [online] (Updated 07/02/2013) Available at:

<http://www.defra.gov.uk/statistics/environment/>

³⁶ Lewisham Municipal Waste Strategy 2008

³⁷ London Plan policy 4A.25 and Table 4A.6

³⁸ Southeast London Boroughs' Joint Waste Apportionment Technical Paper, 2009 and 2014

Appendix C

Sustainability Objectives, Indicators, Targets and Monitoring

Sustainability Objective	Indicator	Target	Monitoring Year/Frequency	Data Source	Action
1. To provide sufficient housing and the opportunity to live in a decent home	<p>Number of housing completions</p> <p>Gypsy and Traveller pitches</p> <p>Number of affordable housing completions (by tenure type)</p> <p>Mix of housing tenure</p> <p>Mix in dwelling sizes</p> <p>Provision of student/other specialist housing</p> <p>Number of households in housing need</p>	<p>50% affordable homes</p> <p>70:30 split between social and intermediate housing</p> <p>At least 40% affordable homes to be 3 bedrooms or more</p>	Annual	Annual Monitoring Report	<p>Allocation of Gypsy and Traveller pitches</p> <p>Provision of housing, including affordable housing</p>
2. To improve the health of the population	<p>Households with limiting long-term illness</p> <p>Mortality rate from circulatory diseases at age under 75</p> <p>Mortality rate from all cancers at age 75 of under</p> <p>Health life expectancy at age 65</p> <p>Number of people taking part in activities that improve physical and mental health in the borough</p> <p>Indices of deprivation: health deprivation and disability; barriers to housing and services domain; and living environment domains</p>		Every 10 years	ONS	<p>Encourage walking and cycling</p> <p>Maintain or improve access to healthcare</p>

3. To reduce poverty and social exclusion	Number of recorded racial incidents Indices of Multiple Deprivation Children in Poverty (under 16's)	Improve the London Borough of Lewisham's rank in the Indices of Multiple Deprivation	Every 3 years	CLG	Promote social cohesion and reduce poverty
4. To improve accessibility to leisure facilities, community infrastructure and key local services	Gain/loss of community/recreational facilities Delivery of identified social infrastructure Funding for community facility improvements secured	No net loss of recreational facilities	Annual	Annual Monitoring Report	Provision of leisure facilities, community infrastructure and key local services
5. To reduce crime, antisocial behavior and the fear of crime	Number of schemes incorporating 'secured by design' Indices of deprivation: Crime domain Number of offences per 1,000 population Numbers of types of crime per annum (Metropolitan Police) Reports of anti-social behaviour (Metropolitan Police) Indicators for the following: <ul style="list-style-type: none"> • Violence against the person • Burglaries • Robberies • Violent crime • Sexual offences 		Annual	Office of National Statistics Metropolitan Police Service	Promote safety of the environment and social cohesion

<p>6. To reduce car travel and improve accessibility by sustainable modes of transport</p>	<p>Number of car parking spaces delivered in new development</p> <p>Number of completed car limited developments</p> <p>Number of car clubs and parking bays</p> <p>% of permitted major developments with a travel plan</p> <p>Proportion of journeys made on foot and by bicycle</p> <p>Number of electric car charging points</p> <p>Improvements to legibility and signage</p> <p>Improved pedestrian and cycle routes and crossings</p> <p>Number of cycle parking spaces provided for each new home or other development and public realm</p> <p>Improved lighting and natural surveillance on pedestrian and cycle paths</p> <p>Number of road accident casualties per 1,000 population serious or fatal</p> <p>Public transport accessibility levels</p> <p>Transport related CO2 emissions</p>	<p>Higher density development to be located within areas with a higher PTAL</p> <p>11% of total trips made by cycle or foot by 2025</p> <p>Year on year increase in number of electric car charging points</p> <p>All major developments to have travel plans</p> <p>All development permitted to include cycle facilities</p>	<p>As reviewed by Transport for London</p>	<p>Transport for London</p> <p>Census</p> <p>Annual Monitoring Report</p>	<p>Maximise accessibility of Gypsy and Traveller sites to services and public transport</p> <p>Enhance walking and cycling routes</p> <p>Reduce car ownership</p>
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<p>7. To mitigate and adapt to the impact of climate change</p>	<p>Number of homes achieving Code for Sustainable Homes level 4 or above granted/completed</p> <p>Number of BREEAM buildings granted/completed</p> <p>Number and capacity of decentralised energy granted/completed</p> <p>Number, type and capacity of renewable energy granted/completed</p> <p>Number and size of living roofs granted/completed</p> <p>Number of new developments incorporating water efficiency measures</p>	<p>Maximise renewable energy by type</p> <p>Increase in the number of living roofs and walls</p> <p>Year on year reduction in the carbon footprint of Lewisham</p> <p>All houses built to Code for Sustainable Homes Level 4</p> <p>All non-residential development built to BREEAM excellent standard</p>	<p>Annual</p>	<p>Annual Monitoring Report</p> <p>EA and Stockholm Environment Institute</p>	<p>CO2 reduction and energy efficiency</p> <p>Efficient use of natural resources</p>
<p>8. To improve air quality and water quality, manage water resources and reduce noise and vibration</p>	<p>Water pollution incidents</p> <p>Change in chemical river quality</p> <p>Number of developments approved against the recommendation of the statutory water/sewerage undertaker on low pressure/flooding grounds</p> <p>LLSOA Electricity and Gas consumption</p> <p>Per capita reductions in CO2</p> <p>Levels exceeding Main Air Pollutant Quality Standards</p> <p>Levels of NO2 and PM10</p>	<p>National Air Quality Strategy standards</p> <p>Reduction in noise complaints</p> <p>No decrease in water quality</p>	<p>Annual</p>	<p>Annual Monitoring Report</p> <p>London Air Quality Archive</p>	<p>Water management and SUDS implementation</p> <p>Minimise air pollution</p> <p>Reduce noise</p> <p>Consider compatibility of land uses</p>

	<p>Number of complaints related to noise from roads, construction, maintenance, noisy neighbours and/or other.</p> <p>Number of Considerate Constructors schemes registered with new developments and refurbishments</p> <p>Estimated water consumption of new development</p>				
<p>9. To increase, maintain and enhance open space, biodiversity, flora and fauna</p>	<p>Area of designated habitats</p> <p>Number and size of biodiverse brown living roofs granted/completed</p> <p>Number of bat and other bird boxes delivered as part of new developments</p> <p>Number of applications granted or refused on designated open space and within SINCs</p> <p>Amount of new or improved open space provided, including that which provides a net gain for biodiversity and accessible natural greenspace</p> <p>Number of new allotments and community gardens</p> <p>Funding secured for open space improvements</p> <p>Waterways created, restored or enhanced</p>	<p>Year on year reduction in the ecological footprint of Lewisham</p> <p>Year on year increase in the number of bat and bird boxes provided with development</p> <p>No net loss of open space</p>	<p>Annual</p>	<p>Annual Monitoring Report</p> <p>EA and Stockholm Environment Institute</p>	<p>Efficient use of natural resources</p> <p>Maintain or enhance biodiversity importance</p> <p>Protect and enhance open space and linkages</p>

<p>10. To mitigate and reduce flood risk, improve water quality, manage water resources, and restore and enhance the river network.'</p>	<p>Number of planning permissions granted contrary to the advice of the Environment Agency on either flood defense grounds or water quality</p> <p>Number of SUDS granted and delivered</p> <p>Flooding incidents</p> <p>Condition of any flood defences</p>	<p>No applications granted contrary to Environment Agency advice</p>	<p>Annual</p>	<p>Environment Agency</p>	<p>Work in partnership with the Environment Agency</p> <p>Flooding and water management</p>
<p>11. To maintain and enhance landscapes and townscapes</p>	<p>Number of key views maintained and enhanced</p> <p>Pre applications and applications considered by the design review panel</p> <p>Number of interventions aimed at improving streetscapes</p> <p>Density of housing</p>	<p>All major applications to be referred to the design review panel</p>	<p>Annual</p>	<p>Annual Monitoring Report</p>	<p>Protect landscape and townscape</p>
<p>12. To conserve and where appropriate enhance the historic environment</p>	<p>Number of designated heritage assets (including listed buildings and conservation areas)</p> <p>Number of undesignated heritage assets (locally listed buildings, areas of archaeological significance)</p> <p>% of applications where archaeological strategies were developed and implemented</p> <p>Number of applications that have considered views of strategic importance</p>		<p>Annual</p>	<p>Annual Monitoring Report</p> <p>English Heritage</p>	<p>Protect heritage assets</p>

	<p>Number of conservation areas with up to date conservation area character appraisals or at risk (absent conservation area appraisal)</p> <p>Condition of designated and undesignated heritage assets</p>				
<p>13. To minimise the production of waste and increase waste recovery and recycling</p>	<p>% of waste recycled, reused or composted</p> <p>Tonnes of waste sent to landfill per year</p> <p>Residual household waste per year</p> <p>Amount of waste recycled on site by residents and employment industries</p>	<p>Residual waste per household in Lewisham</p> <p>2011/2012 720kg</p> <p>2012/2013: 718kg</p> <p>2013/2014: 716kg</p> <p>% of household waste sent for reuse, recycling and composting in Lewisham</p> <p>2013/2014: 21% waste recycled</p> <p>% household waste sent to landfill in Lewisham</p> <p>2011/2012: 7%</p> <p>2012/2013: 6.5%</p> <p>2013/2014: 6%</p>	<p>Annual</p>	<p>Strategic Waste and Management</p>	<p>Waste Management</p>

14. to reduce land contamination and safeguard soil quality and quantity	<p>Number of planning applications with the potential for land contamination</p> <p>Number of identified contaminated sites</p> <p>Number of new homes built on previously developed land</p>	No reduction in soil quality	Every 10 years	Annual Monitoring Report	Land remediation
15. To encourage sustained economic growth	<p>Area of employment land with mixed use employment location (MEL) and local employment location (LEL)</p> <p>Size and type of employment floorspace</p> <p>Amount of vacant employment floorspace</p> <p>Amount of new completed employment floor space</p> <p>New business registration rate</p> <p>Rent levels of employment accommodation</p>	<p>No loss of employment land</p> <p>Minimise vacant employment land</p> <p>Annual completion no net loss</p>	Annual	<p>Lewisham ELS</p> <p>London Borough of Lewisham GIS</p> <p>Annual Monitoring Report</p>	<p>Protection of employment sites</p> <p>Maintain a supply of a variety of employment floorspace</p>
16. To promote access to employment, education, skills and training	<p>Employee numbers in Lewisham</p> <p>Indices of deprivation: Education, skills and training domain</p> <p>% of businesses in the area showing employment growth</p> <p>Job density in Lewisham</p> <p>Number of employed and unemployed living in the area</p> <p>Numbers of employees and business owners who are BME</p>	<p>Increase in jobs</p> <p>Increase in percentage of local residents employed for specific development projects, including apprenticeships</p> <p>No reduction in job density</p>	Annual	<p>National Annual Business Inquiry</p> <p>Office of National Statistics</p> <p>Official Labour Market Statistics</p>	<p>Maximise and provide a range of local employment opportunities</p> <p>Protection of employment sites to secure local job opportunities</p> <p>Local labour agreements</p>

	<p>% of population of working age who claim unemployment benefit</p> <p>Number of pupils achieving 5 or more GCSE's at grades A* to C or equivalent</p> <p>% of population aged 16-74 with no qualifications</p> <p>Number of full and part time courses provided</p> <p>Number of full and part time people participating in educational courses/events in the area</p> <p>% of population in Lewisham with higher education qualifications</p> <p>Funding secured for improvements in the quality and level of education infrastructure</p>	<p>Increase in employment rate</p> <p>Narrow gap to the GB average employment rate to no more than 3% points</p> <p>Year on year decrease in the number of people without qualifications in Lewisham</p>			
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Council			
Report Title	Catford Regeneration Partnership Limited – 2018/19 Business Plan		
Key Decision	Yes	Item No.	
Ward	All		
Contributors	SGM Capital Programmes		
Class	Part 1	Date 18 July 2018	

1. SUMMARY

- 1.1 The Catford Regeneration Partnership Limited (CRPL) is a wholly owned company of Lewisham Council. The company was originally created in January 2010 to purchase the leasehold interests in and around the Catford Centre in order to manage and regenerate the property to improve the economic, social and environmental wellbeing of the people of the London Borough of Lewisham.
- 1.2 This report presents the company’s 2018/19 Business Plan. The plan continues to set the scene about the need to broaden the business activities to provide a more resilient base, support wider regeneration in Catford and the surrounding area and provide wider investment opportunities for CRPL going forward.

2. PURPOSE OF THE REPORT

- 2.1 To submit the 2018/19 Business Plan for the Catford Regeneration Partnership Limited in accordance with the company’s Shareholder Reserved Matters.

3. RECOMMENDATION

- 3.1 That Council approves the 2018/19 Business Plan for the Catford Regeneration Partnership Limited (CRPL).

4. POLICY CONTEXT AND BACKGROUND

- 4.1 Lewisham’s overarching sustainable communities strategy sets out a vision for the future of the borough. One of the priorities laid out in the strategy is to develop, build and grow communities that are *dynamic and prosperous – where*

people are part of vibrant communities and town centres, well connected to London and beyond. This report supports the aims of the strategy.

4.2 This report is also in alignment with the Council's corporate policy. Lewisham's Strategic Asset Management Plan sets out the approach to using property effectively in order to achieve the Council's objective of making Lewisham the best place in London to live, work and learn. It suggests a proactive approach for the use of the Council's assets as they have a key role to play in supporting the borough's regeneration aims.

4.3 The content of this report also supports the aims of Lewisham's regeneration strategy of 'people, prosperity and place'. This links the Council's corporate priorities to the development and regeneration of Lewisham's communities, the local economy and the built environment.

4.4 The CRPL was set up in January 2010 following Council approval. The company was tasked with the following activities:

- To continue the effective management of the Catford Centre, ensuring that the operational management standards remain high and that the full commercial potential of the centre is being realised through letting and renewal strategies.
- To enable the redevelopment of the Catford Centre by working with Lewisham Council to undertake a regeneration process and reach a commercial agreement with key stakeholders in the town centre, in order to contribute to the regeneration aims for the town centre as a whole.

4.5 At the company's inception, the Articles of Association were agreed. These detail how and when the company must interact with its shareholders. In this case it is Lewisham Council, which is the sole shareholder.

4.6 Operational responsibility for the company is given to the Lewisham Council nominated company directors.

4.7 The company is required to submit a business plan for approval by the Council as shareholder for each financial year, in this case, for 2018/19.

5. SUMMARY CURRENT POSITION AND 2018/19 BUSINESS PLAN

5.1 Since the acquisition of the Catford Centre in February 2010, CRPL has been working on operational management issues to ensure that the centre is fit for purpose, meets quality standards, and that rent is collected in a timely manner. The company directors have ensured that all health and safety standards continue to be complied with and a significant amount of major repair works have been identified and completed.

- 5.2 In line with the plans presented in previous financial years, CRPL has continued to develop an effective and efficient management approach for the operation of the property assets through a team of professional advisors, including an in house surveyor from the Council's Operational Asset Management team, officers from the Council's Capital Programme Delivery team and external agents that oversee daily management of the property and report to the directors of the CRPL.
- 5.3 Over the course of the last year, money has been spent on repairs and maintenance for some of the properties within the portfolio. This has been a mixture of planned and routine work, but has also included emergency and responsive work deemed necessary to ensure that those properties have remained fully operational. It should be noted that any delay in the commencement, progress and completion of the redevelopment of Catford is likely to have an adverse impact on the CRPL's cash flow position as such unplanned and responsive repairs and maintenance issues will still need to be dealt with as they arise.
- 5.4 During 2014, the CRPL received approval from Mayor & Cabinet to acquire the Brookdale Club Limited's freehold premises in Catford. The acquisition is a significant component of the Council's wider regeneration initiatives to facilitate the regeneration of the Town Centre. The transaction completed in December 2016 and lease arrangements for interim use are currently being progressed prior to its demolition and redevelopment as part of the wider Catford Regeneration Programme.
- 5.5 Overall the company budgeted for a surplus of £30k for the 17/18 financial year and the actual outturn is expected to show a small surplus of £13k. This is due to increased security cost and non-recoverable maintenance.
- 5.6 The delivery of the Company's business plan for 2018/19 requires a further injection of a loan facility from the Council. The loan will enable the company invest in a number of key assets over the coming year to help boost its asset and income base to help counter projected drops in income at the onset of construction. The loan requirement and the associated terms were approved by Mayor and Cabinet at their meeting on 27th June 2018.
- 5.7 CRPL continues to take the best interim commercial view of all property management activity and fully assess actions and risks on the basis of the best information available at that time with regards the timing of the regeneration programme and vacant possession of assets required as a consequence. For the time being all new lettings and renewals that fall within the development scheme are being renewed on the basis of 5 year lease excluded from the Landlord and Tenant Act 1954. A 5 year lease means that the centre remains reasonably attractive to a wider range of retailers and is realistic in terms of the expected timescales for redevelopment.
- 5.8 As the Catford Regeneration Programme continues to gain momentum during 2018/19, with the development of a Masterplan, it will become necessary for

CRPL's shareholder reserved matters to be reviewed to reflect the role the company is likely to play in the regeneration effort. In this case, any suggested amendments will be brought to Full Council for approval.

6. FINANCIAL IMPLICATIONS

- 6.1 The financial implications are included in the Business Plan 2018/19 which is attached at Appendix 1.
- 6.2 The successful implementation of the current year's Business Plan requires a further loan injection from the Council. The terms of the loan were approved by Mayor and Cabinet at the meeting 27th June 2018.

7. LEGAL IMPLICATIONS

- 7.1 The legal implications are included in the Business Plan 2018/19 which is attached at Appendix 1.

8. EQUALITY IMPLICATIONS

- 8.1 There are no immediate equalities implications directly arising from this report or the associated business plan which is attached at Appendix 1. Any equality implications for the future regeneration programme will be considered at the appropriate time as Catford undergoes its redevelopment.

Appendices:

Appendix 1 – CRPL 2018 - 19 Business Plan

BACKGROUND PAPERS

Short title of document	Date	File Location	Contact Officer
Catford Centre Mayor & Cabinet Report	27 th January 2010 (Council)	Regeneration & Place	Kplom Lotsu
Catford Regeneration Partnership Ltd – 2016/17 Business Plan	July 2016	Regeneration & Place	Kplom Lotsu
Catford Regeneration Programme – Update and Housing Zone Mayor & Cabinet Report	28 th September 2016	Regeneration & Place	Kplom Lotsu
Catford Regeneration Programme – Update Mayor & Cabinet Report	9 th November 2016	Regeneration & Place	Kplom Lotsu

Catford Regeneration Partnership Ltd – 2017/18 Business Plan (Mayor and Cabinet)	10 th May 2017	Regeneration & Place	Kplom Lotsu
Catford Regeneration Programme – Masterplan Brief	28 th February 2018	Regeneration & Place	Kplom Lotsu
Catford Regeneration Partnership Ltd – 2018/19 Business Plan (Mayor and Cabinet)	27 th June 2018	Regeneration & Place	Kplom Lotsu

For further information please contact Kplom Lotsu, SGM Capital Programmes on 0208 3149283

Catford Regeneration Partnership Ltd

Business Plan 2018/19

Introduction

Catford Regeneration Partnership Limited (CRPL) is a wholly owned subsidiary of Lewisham Council. The company was originally created in January 2010 to purchase the leasehold interests in and around the Catford Centre in order to manage and regenerate the property to improve the economic, social and environmental wellbeing of the people of the London Borough of Lewisham (LBL).

The purpose of this business plan is to set out the company's objectives, activities, and budget for 2018/19 for agreement by the Council as sole shareholder in accordance with the company's articles of association (listed at Appendix B).

Structure and governance

CRPL currently has two directors, Ralph Wilkinson (LBL Head of Public Services) and Selwyn Thompson (LBL Head of Financial Services). The directors are responsible for the day to day running of the company in line with the articles of association and have other statutory duties as defined by the Companies Act 2006. The directors must take account of the approved business plan when exercising their functions in the management of the company. The directors are appointed and removed by the Council as sole shareholder.

In line with the plans presented to the Council in previous financial years, the CRPL has continued to develop an effective and efficient management approach for the operation of the property through a team of professional advisors, including an in-house surveyor from the LBL Estates team and external agents that oversee daily management of the property and report to the directors of CRPL. Officers from the Capital Programme Delivery Team as part of the Catford Regeneration Programme support the CRPL in relation to the regeneration aspects of their objectives. The in-house officers' time is recharged to the company as and when appropriate.

Certain key decisions in relation to the company are classified as reserved matters and must be approved by the Council as sole shareholder. The Mayoral Scheme of Delegation allows specific officers to take executive decisions in relation to the Company where appropriate. The complete list of shareholder reserved matters is included in Appendix B, with key matters including:

- the approval of each Business Plan;
- the approval of each Budget and in any financial year changes over £50,000 in any one amendment to the Budget and changes to the Budget exceeding £200,000 in aggregate in any financial year (as set out in section 25.2 of the Articles of Association).
- the making of any acquisition or disposal by the Company other than in accordance with the then current Business Plan and Budget;
- the making of any application for planning permission;
- the implementation of any regeneration initiative other than in accordance with the then current Business Plan.

These reserved matters ensure that the Council retains control over the direction of future regeneration proposals. The Council's Catford Programme Board, chaired by the Executive Director for Resources & Regeneration, has had responsibility for setting the overall direction on the regeneration of Catford town centre. The CRPL is represented at these programme board

meetings, which have been used as the mechanism for updating the Council on progress against the company's objectives.

As the Catford Regeneration Programme continues to gain momentum during 2018/19, with the development of a Masterplan, it will become necessary for CRPL's shareholder reserved matters to be reviewed to reflect the role the company is likely to play in the regeneration effort. In this case, any suggested amendments will be brought to Full Council for approval.

Objectives

The CRPL has continued to work alongside the Council to build on the proposed delivery strategy and commercial approach for a regeneration programme for Catford town centre. The CRPL directors propose the following company objectives for the 2018 / 2019 financial year:

- To continue the effective management of the Catford Centre and other CRPL assets, ensuring that the operational management standards remain high and that the full commercial potential of all assets are realised through letting and renewal strategies, including meanwhile and interim uses, events and hires.
- To agree with the Catford Programme Board revised timescales for the regeneration programme for Catford Town Centre.
- To ensure sustainable financial models are developed that allow progression from current holding and operation positions through redevelopment, into successful future investment positions.
- To enable the redevelopment or partial/comprehensive refurbishment of the Catford Centre and other CRPL assets by working with Lewisham Council to evolve and undertake a regeneration process and reach a commercial agreement with key stakeholders/potential partners.
- Work with Lewisham Council, in order to contribute to the regeneration and investment aims as a whole through property related activities.
- To enable CRPL to acquire and dispose of key properties that are considered strategic or surplus to further regeneration aims within the borough. This is not to be limited only to properties with commercial use.
- To implement the recommendations of the Internal Audit Report issued in May 2018

Activities

In order to achieve these objectives, CRPL continues to and will in the future promote, commission, undertake or participate in a range of activities, including:

Centre and Property Management

- Rent collection and arrears management;
- Service charge administration; including reconciliations to tenants and the creation of future service charge budgets;
- Tenant liaison; operational issues, lease issues and queries on wider regeneration aims;
- Health & safety; assessment and compliance of property, day to day implementation of H&S policies and practices;

- Facilities management and maintenance; ensuring that all of the landlord's obligations are met, create and maintain a schedule of repairs, major works, improvements and comprehensive redecoration as required;
- Asset management, including acquisitions and disposals, redevelopment and lease regears (such as lease renewals, rent reviews and new lettings);
- Legal proceedings relating to leases and rental arrears;
- Data management; maintenance of accurate records and accounts;
- The CRPL contracts; procurement and management of services provided to the CRPL by outside parties. These include centre management, legal, accountancy, landlord and tenant advice and asset management services.

Regeneration

- Procurement of professional services (in conjunction with LBL)
- Consultation (in conjunction with LBL)
- Commercial negotiation with other land owners/potential partners
- Engagement with stakeholders (in conjunction with LBL)
- Retail, Commercial, Leisure and Residential proposals
- Design/feasibility/master-planning/place-making/financial modelling work
- Planning strategies (led by LBL)
- Milford Towers decant strategy (led by LBL)
- Council office design (led by LBL)
- Residential proposals (in conjunction with LBL)
- Development management.

Key professional services to assist the CRPL in the delivery of these activities include:

- Cushman & Wakefield - Managing agents
- Mason Owen – Retail letting agents
- Johnson Fellows - Surveyors & rent review negotiators
- Field Fisher – Solicitors
- Richard Lambeth - Accountant

Temporary agreements have been put in place for these agreements to see CRPL through to March 2019. During the period up till then each service will be retendered in an open market tender exercise.

Financial Review 2017/18

Overall the company budgeted for a surplus of £30k for the 17/18 financial year and the actual outturn shows a small credit due to increased security cost and non-recoverable maintenance.

Professional Fees – This covers surveying, legal and accountancy services. Cushman's annual management fee is c.£50,700 in 2017/18 and c.£52,000 in 2018/19. Other fees will vary based on lettings undertaken and concluded during the financial year

Interest Rate on Outstanding Loans – The interest rate charged on the loan to the CRPL by the Council remains at 4.3% with effect from 10th May 2015.

Operational Review 2017/18

Commercial Lease lettings and renewals – CRPL continue to take a flexible approach in entering into leases with commercial tenants including temporary lettings to cover service

charge and business rates. There have been two new lettings in the shopping centre during the past year, namely the Card Factory at unit 1 and Savers in unit 6, both bringing good shop fit-outs and known multiple retailer offers into the centre. In addition, Thomas Lane Depot, which has been vacant and derelict for a number of years has been let to Supersets. Supersets have invested significantly in the property and could be an exciting addition in the regeneration of Catford. As there is still no specific timetable for redevelopment at this point, we are continuing to offer leases for a term certain of up to 5 years. Although during the year as the masterplan process develops, consideration would be given to setting a date beyond which term certain leases can't be granted and break clauses should be introduced.

Also the Minimum Energy Efficiency Standard (MEES) which came into effect on 1st April 2018 will move to the next stage on 1st April 2023 and this will make it a legal requirement that all leased property must have an EPC rating of E or better or the lease will be null in void and the property become vacant unless the Landlord carry's out work to make them E or better beforehand.

There are currently 3 vacant units in the centre, units 2-3, 4 and 29, with interest being shown in all three. An offer to lease unit 29 has been received and is being progressed at a rate of circa £31psf. In the current context, this is considered a very good offer which sets the tone for expectations on the other units. No significant offers have been made yet in respect of units 2-3 and 4 however interest is growing and it is hoped offers will be received within the next 2 to 4 weeks. Although there is interest, as yet no significant offer has been received on 148 Rushey Green which became available following the vacation of Vodafone. This unit falls outside the redevelopment boundary for the masterplan and should elicit an offer to lease for 10 years.

Residential leases and renewals – CRPL hold a number of self-contained residential flats situated above the commercial shops. The majority of these are leased on assured shorthold tenancies (ASTs) with two leased to the Council's Private Sector Lettings team. There is one renewal due during the year and this will be renewed and one at number 14 will be let on the open market at market rent following the implementation of some minor works.

The current overall annual rental income for the CRPL portfolio is £945k. This is broken down as £520k from the shopping centre, £52k from the market stalls, £276k for the other commercial properties on the Broadway and Rushey Green and £95k for the residential. It is expected that this will grow over the coming year as a result of new lettings particularly 17-18 Catford Broadway which will generate in excess of £130,000pa and which will come on stream at year end 2019. The big effect this year on value/income has been a reduction in the valuation as a result of allowing Poundland to stop paying rent. A number of developments This will be corrected in 2018-19 thanks to letting progressed in 2017/18.

Operational Preview 2018/19

General Items – we will be working hard to maintain tenancies whilst minimising service charge expenditure so that tenants want to occupy on short term tenancies. Until the masterplan is developed the development timeline becomes clearer, CRPL will take the best interim commercial view of all property management activity and will fully assess actions and risks on the basis of the best information available at that time with regards to the vacant possession date. For the time being all new lettings and renewals that fall within the development scheme are being renewed on the basis of 5 year lease excluded from the Landlord and Tenant Act 1954. The current approach is to continue to offer 5 year leases but subject to a Landlord only break for redevelopment at any time after 1-07-2023

In line with the Company's objects (section 2 - Articles of Association) to carry on a business that will improve the economic, social and environmental wellbeing of the area and the

residents of Catford and the wider London Borough of Lewisham, CRPL will continue to take a pro-active view in relation to acquisitions, regeneration, development and investment activities both within Catford and the wider London Borough of Lewisham.

CRPL's strategic approach will help the company to become more financially resilient whilst also assisting the Council to further its regeneration and meet its corporate objectives.

17 and 18 Catford Broadway – These properties comprise ground floor commercial units with residential above. Both properties are vacant and require significant capital investment. Tsuruta Architects have been appointed and have devised a redevelopment / refurbishment scheme for both properties which is currently in for planning consent. The refurbished units both residential and retail will produce an annual rental income of between £130,000 and £140,000 per annum and produce a capital value of circa £2,000,000. The investment required for both units is circa £750,000.

Brookdale Club– Securing a letting of the Brookdale club has proven difficult with several offers having fallen through. Negotiations are currently well advanced with an operator for a proposed music venue. Other options are also being considered in case the current offer does not proceed. A property guardianship service is being explored as an alternative interim measure to the current high cost of manned security at the premises. A further alternative may be to seek to progress an early demolition of the site if cost effective beneficial interim uses cannot be secured.

Constitutional Club – The lease of the premises ends in September 2018. The property has been part occupied for 5 years by Pubola Ltd who have paid no rent and done minimal works to the unit. A condition survey report has recently been completed for the property and shows that the property needs significant investment to make it wind and water tight. A part of the property, which is locally listed, is in a dangerous state and has been closed off. The current estimated investment requirement is approximately £1.75M with a minimum investment requirement of approximately £300k to make the building wind and water tight. CRPL will therefore be seeking £300k in the coming year to work up (a) scheme to develop a refurbishment that will retain the major listed facades and extend the floor plate to provide a viable scheme and (b) carry out minimum repairs to secure the structure and make wind and water tight.

Budget Preview 2018/19

CRPL is projecting a very small credit in 2018/19 as a result of the additional borrowing of £1,250,000 proposed here. This shows that the company is operating successfully and it is considered that this is a fair budget assumption as it is carrying out investment that will pay off with increase in value in later years. However the value will diminish the closer we move to implement the redevelopment that will create the real value for London Borough of Lewisham and CRPL.

CRPL is seeking additional loan funds in order to redevelop 17-18 Catford Broadway to bring it back into use and increase its value which is currently at circa £600,000. Sums are also being sought for repairs to the Constitutional Club and the formation of a design team to work up a major redevelopment along the same lines as 17-18 Catford Broadway as well as miscellaneous expenditure needed during the year.

Rental and Service Charge Analysis – Regular meetings are held with our managing agents, Cushman and Wakefield to review such items as management and letting strategies; rental income and arrears; service charge and expenditure; maintenance and repairs;

CRPL takes a flexible approach to its lease renewals and lettings. This approach includes temporary lettings to cover service charge and business rates and also short term lettings to allow flexibility around future regeneration plans.

The shopping centre service charge is a separate cost to tenants and all expenditure is reconciled with their payments at the end of the service charge year. The budget is based on actual spend figures for the previous service charge year, assumptions on increased costs and the renegotiation of service contracts. The accounts are externally audited to ensure that CRPL is meeting all of the requirements of the service charge code. The service charge year runs from the 1st October and the total expenditure up to 30th September 2017 was circa £390,000 and is still to have its audit finalised. The service charge budget for 2017/18 is £480,000 and we understand it is on course to finish at this level. The Budget for 2018-2019 has not been set yet but is likely to be in the order of £500,000 as a result of wage inflation.

We will be retendering all professional services contracts during H2 of 2018 and some fees will go up Managing Agents fee and Accounting fee whilst the other professional services fees will be about the same level but will depend on lettings and rent reviews undertaken in the year.

APPENDIX A

CATFORD REGENERATION PARTNERSHIP LTD

PAST AND CURRENT YEARS' BUDGETS

	18-19 Business Plan			
	2016/17 Final Outturn £000	2017/18 Original Budget £000	2017/18 Forecast Outturn £000	2018/19 Original Budget £000
<u>INCOME</u>				
Loan income	-	-	-	1,250cr
Lease Rents Receivable	1,084cr	1,100cr	958cr	860cr
Look to increase Other Income	-	-	-	-
Service Charge Recoveries	40cr	40cr	40cr	40cr
TOTAL INCOME	1,124cr	1,140cr	998cr	2,150cr
<u>EXPENDITURE</u>				
-	-	-	-	-
<u>CRPL costs</u>				
CRPL Employee Costs	5	5	5	5
LBL Staff Recharges	50	50	50	50
Letting and Renewals Fees	53	90	47	65
Property Running Costs	174	110	183	210
Major Works, R & M	27	50	65	70
Major Works	-	50	-	1,000
Property Purchase Costs	-	-	-	10
Insurance Costs (Net)	19	20	10	20
Fees and Miscellaneous	22	20	9	20
	350	395	369	1500
<u>Loan Repayments</u>				
Interest	507	530	529	570
Principal	210	185	87	70
	717	715	616	640
TOTAL EXPENDITURE	1,067	1,110	985	2,140
NET PROFIT (cr) / LOSS	57cr	30cr	13cr	10cr

APPENDIX B - Shareholder reserved matters

- 1 the CRPL's articles of association identify the following items as shareholder reserved matters:
 - 1.1 the approval of each Business Plan;
 - 1.2 the approval of each Budget and in any financial year changes over £50,000 in any one amendment to the Budget and changes to the Budget exceeding £200,000 in aggregate in any financial year;
 - 1.3 the declaration and/or payment of any dividends by the Company save where such declaration and distribution is made in accordance with the Company's dividend policy;
 - 1.4 the approval of and any change to the Company's dividend policy;
 - 1.5 the increase in any indebtedness of the Company other than in accordance with the prevailing Budget;
 - 1.6 the commencement by the Company of any new business not being ancillary to or in connection with the Business or making any change to the nature of the Business;
 - 1.7 the Company participating in any activity which is detrimental to and/or incompatible with the Business;
 - 1.8 the making of any political or charitable donation;
 - 1.9 the making of any acquisition or disposal by the Company other than in accordance with the then current Business Plan and Budget;
 - 1.10 writing off a bad debt exceeding £25,000 provided that if debts of that person or organisation have been written off by the Company in the previous three years in an aggregate amount of £50,000 or more, the decision to write off any further bad debts for that person or organisation shall also be a reserved matter;
 - 1.11 the making of any application for external funding;
 - 1.12 the repurchase or cancellation by the Company of any shares, or the reduction of the amount (if any) standing to the credit of its share premium account or capital redemption reserve (if any) or any other reserve of the Company;
 - 1.13 a change of name of the Company or location of its registered office;
 - 1.14 any issue of new shares in the Company.
 - 1.15 the devolution or transfer of all or part of the management of the Company or its business to persons who are not directors of the Company and, if approved, the terms of such devolution;

- 1.16 without limiting the generality of article 25.15, the appointment of any Chief Executive Officer or person holding a similar role and the terms of such appointment;
- 1.17 the appointment or removal of any director of the Company;
- 1.18 the engagement of (and terms of engagement of) any individual person as a consultant (but excluding for such purposes any firm/professional advisers) or employee;
- 1.19 the engagement of (and terms of engagement of) any company, partnership, individual person or other entity for the provision of services to the Company where the services provided are not contemplated in the then current Business Plan and Budget and/or where the value of the services is above the Official Journal of the European Union limit for services and/or where the services have not been tendered in accordance with the [Company's Contract Lettings Procedure];
- 1.20 any change to the terms of employment/engagement and/or remuneration of a person referred to in articles 25.18 and 25.19;
- 1.21 the letting of any contract for the provision of supplies to the Company where the supplies provided are not contemplated in the then current Business Plan and Budget and/or where the value of the contract is above the Official Journal of the European Union limit for supplies and/or where the contract has not been tendered in accordance with the [Company's Contract Lettings Procedure];
- 1.22 the letting of any contract for the provision of works to the Company where the works provided are not contemplated in the then current Business Plan and Budget and/or where the value of the contract is above £200,000 and/or where the contract has been not tendered in accordance with the [Company's Contract Lettings Procedure];
- 1.23 the instigation of any court proceedings where the directors have not taken appropriate legal advice or where such proceedings would be against that legal advice;
- 1.24 the authorisation of the levying of distress against the occupants of land or property in arrears where the directors have not taken appropriate legal advice or where such actions would be against that legal advice;
- 1.25 the making of any application for planning permission;
- 1.26 the implementation of any regeneration initiative other than in accordance with the then current Business Plan;
- 1.27 the commencement of any winding-up or dissolution of or the appointment of any liquidator, administrator or administrative receiver of the Company or any of its assets unless it shall have become insolvent.

Agenda Item 9

Council		
Report Title	Community Infrastructure Levy Preliminary Draft Charging Schedule	
Key Decision	YES	Item No.
Ward	All	
Contributors	Head of Planning and Head of Law	
Class	Part 1	Date: 18th July 2018

1. Summary

- 1.1 The Community Infrastructure Levy (CIL) is a levy that local authorities can choose to charge on new development in their area, and which was introduced by the Planning Act 2008. The detailed implementation of CIL is set out in the Community Infrastructure Levy Regulations 2010 (as amended). Local authorities must spend the levy on infrastructure needed to support the development of their area, which can include a wide range of infrastructure such as schools, hospitals, roads, open space, and leisure facilities.
- 1.2 In order to charge CIL, the Council must produce a Charging Schedule which identifies the rate (or rates) for different types of development. In setting the rates for CIL, an appropriate balance must be struck between additional investment to support development and the potential effect on the viability of developments.
- 1.3 The Council adopted its current CIL charging schedule in 2015 based on viability evidence that was produced in 2012. Since that time there have been significant changes in values across the borough. Furthermore, projections made for the five year housing land supply in Lewisham shows a continued strong delivery of housing, supported by an ambitious programme of infrastructure investment and regeneration, including the arrival of the Bakerloo Line Extension. This will likely underpin continued strong value growth in the borough.
- 1.4 The rates proposed in the initial consultation version of the Council's proposed new Charging Schedule ('The Preliminary Draft Charging Schedule 'PDCS') (attached at Appendix A), have been informed by viability evidence prepared by consultants specialising in this work. This evidence is captured in the 'CIL Viability Review Report' (attached at Appendix C).
- 1.5 In accordance with the requirements of the CIL Regulations and associated guidance, a number of other documents support the PDCS including a 'Draft Community Infrastructure Levy Infrastructure Delivery Schedule' (attached at Appendix B) and an 'Affordable Housing Delivery and Planning Obligations Report' (attached at Appendix D).
- 1.6 A minimum of two consultations on a new Charging Schedule are required by the Regulations, first on a PDCS and then on a Draft Charging Schedule ('DCS'). Following this, an examination in public is required and then the Charging Schedule can be adopted by the Council if adoption is recommended by the examiner. The following provides an indicative timescale:

Action	Dates
Consultation on PDCS	23/7 – 3/9
Consideration of responses received	3/9 – 17/9
Consultation on DCS	24/9 – 5/11
Consideration of responses received	5/11 – 3/12
Examination in Public	January 2019
Mayor and Cabinet/Full Council	March 2019
Adoption	April 2019

- 1.7 As part of the CIL review, amendments are also proposed to the Instalments Policy (attached at Appendix F) to reduce the threshold from £500,000 to £100,000 in line with the Mayor of London's CIL Instalments policy.
- 1.8 A report on the PDCS was considered and approved by Mayor and Cabinet on the 6th June 2018. A copy of the report is attached at Appendix G.

2. Purpose

- 2.1 To provide the Council with the information needed to approve the PDCS for public consultation.

3. Recommendations

- 3.1 The Council (to the extent that it is not an executive function) is recommended to:
1. Approve the PDCS for public consultation.
 2. Note the Draft CIL Infrastructure Delivery Schedule, CIL Viability Review Report, Affordable Housing Delivery and Planning Obligations Report and Equalities Analysis Assessment.
 3. Delegate authority to the Executive Director, Resources and Regeneration to:
 - Approve any minor changes to the text and format of the PDCS and supporting documents prior to consultation;
 - Approve minor modifications to the PDCS and supporting documents following public consultation;
 - Where no material modifications are required to the proposed Charging Schedule following the consultation on the PDCS, approve the undertaking of a subsequent consultation on a DCS; and
 - Where no material modifications are required following the consultation on the DCS, to approve the submission of the Council's proposed Charging Schedule and associated evidence base for public examination.
 4. Note that if material modifications to the Charging Schedule following consultation on the PDCS are required, that approval to undertake a subsequent consultation will be referred to back to the Mayor and Cabinet and Full Council.
 5. Approve the adoption of an updated Community Infrastructure Levy Instalments Policy.

4. Policy context

4.1 The contents of this report are consistent with the Council's policy framework.

4.2 The PDCS will contribute to the implementation of the Council's ten corporate priorities and will also play an important role in the implementation of the Sustainable Community Strategy ('SCS') (2008-2020) vision 'Together we will make Lewisham the best place to live, work and learn'.

4.3 The PDCS will provide funding and a system to help support the implementation of the SCS vision and all of the six strategic priorities, which are:

- Ambitious and achieving – where people are inspired and supported to fulfil their potential
- Safer – where people feel safe and live free from crime, antisocial behaviour and abuse
- Empowered and responsible – where people are actively involved in their local area and contribute to supportive communities
- Clean, green and liveable – where people live in high quality housing and can care for their environment
- Healthy, active and enjoyable – where people can actively participate in maintaining and improving their health and well-being
- Dynamic and prosperous – where people are part of vibrant communities and town centres, well connected to London and beyond

4.4 The PDCS will also contribute to the implementation of the Council's Corporate Priorities including:

- Community leadership and empowerment – developing opportunities for the active participation and engagement of people in the life of the community;
- Young people's achievement and involvement – raising educational attainment and improving facilities for young people through partnership working;
- Clean, green and liveable – improving environmental management, the cleanliness and care for roads and pavements and promoting a sustainable environment
- Safety, security and a viable presence – partnership working with the police and others and using the Council's power to combat anti social behaviour
- Strengthening the local economy – gaining resources to regenerate key localities strengthen employment skills and promote public transport
- Decent homes for all – investment in social and affordable housing to achieve the decent homes standard, tackle homelessness and supply key worker housing
- Protection of children – better safeguarding and joined up services for children at risk
- Caring for adults and older people – working with health services to support older people and adults in need of care
- Active, healthy citizens – leisure, sporting, learning and creative activities for everyone

5. Background

5.1 The CIL is a levy that local authorities can choose to charge on new development in their area. Local authorities must spend the levy on infrastructure needed to support

the development of their area, which can include a wide range of infrastructure such as schools, hospitals, roads, open space, and leisure facilities.

- 5.2 Since the introduction of CIL, Section 106 ('S106') planning obligations continue to be used, including to secure affordable housing, but they now have a more restricted role. Local authorities are now not able to pool more than five separate planning obligations to pay for one infrastructure item. The intention of the CIL Regulations is that S106 planning obligations should be used to secure site specific infrastructure which is needed to directly mitigate the impacts of development, whilst CIL is used to help deliver infrastructure to support the development of their area.
- 5.3 In order to charge CIL, local authorities (known as 'charging authorities' under the CIL Regulations) must produce a Charging Schedule which sets out the rate (or rates) for their levy. These rates must be supported by an evidence base including:
- An up to date development plan;
 - The area's infrastructure needs; and
 - An overall assessment of the economic viability of new development
- 5.4 The NPPG states that as background evidence, the charging authority should also provide information about the amount of funding collected in recent years from planning obligations. This should include information on the extent to which affordable housing and other targets have been met.
- 5.5 Once adopted, the levy is a non-negotiable charge on most new development that involves an increase of 100 square metres or more of additional floor space, or the creation of one or more new residential units. The charging authority can set one standard rate or it can set specific rates for different areas, types and scales of development.
- 5.6 Some types of development are exempt from paying the levy such as developments of less than 100 square metres that do not create a new residential unit. In addition, the CIL Regulations also allow exemptions to be claimed for self-build housing and residential annexes and extensions over 100 square metres. Developments by charities of buildings used for charitable purposes and affordable housing is also eligible for relief from CIL.
- 5.7 It should be noted that in London, the Mayor is also a charging authority. The Mayor introduced a CIL (known as 'MCIL1') to fund Crossrail in 2012. The Mayor's levy is currently £35 per square metre in Lewisham, with a limited number of exceptions. On 26 June 2017 the Mayor published for public consultation the Preliminary Draft Charging Schedule for MCIL2 which, if adopted, will increase the current rate in Lewisham to £60 per square metre. The Council collects this levy on behalf of the Mayor.

6. Review of the CIL Charging Schedule

- 6.1 The Council's current CIL Charging Schedule was adopted in 2015. The charging schedule sets out differing rates for residential and other uses. The CIL rates also vary by area, with two separate CIL zones defined in the Charging Schedule. The rates have been subject to indexation on an annual basis in accordance with the CIL Regulations.

- 6.2 Since the evidence base for the current CIL Charging Schedule was prepared, there have been significant changes to sales values and build costs across the borough. That evidence base has been updated through the preparation of the CIL Draft Infrastructure Delivery Schedule ('IDS') and CIL Viability Review report (see Sections 7 and 8 below).
- 6.3 The Draft IDS shows a funding gap of around £4 billion. The CIL Regulations state that when deciding the levy rates, an appropriate balance must be struck between additional investment to support development and the potential effect on the viability of developments. In testing alternative CIL rates, the CIL Viability Review report sets out that relatively significant changes to the current CIL rates could be accommodated without significantly adversely impacting on viability.
- 6.4 Consequently, the Council proposes to revise the CIL charging schedule to increase the rate paid by developments as set out in Table 1 below.

Table 1: Current CIL rates, current CIL rates with indexation applied and proposed CIL rates.

Development type	Zone	Adopted rate	Indexed rate	Proposed rate
Residential C3 use class	Zone 1 ¹	£100	£112	£200
	Zone 2 ²	£70	£79	£125
B use classes	Whole borough	£0	£0	£0
All other uses	Whole Borough	£80	£90	£160

- 6.5 The Council's PDCS (attached as Appendix A) describes the rates proposed in more detail and includes a map showing the 2 charging zones.
- 6.6 Whilst CIL income is very difficult to project, it is estimated that the proposed rates could increase the total CIL income from £39 million to £68 million in today's terms (i.e. before indexation) up to the end of year 2022/23.

7. CIL Infrastructure Delivery Schedule

- 7.1 The Localism Act (2011) requires that in order to set a CIL charging schedule, the Council must use an appropriate evidence base to inform the proposed levy. The NPPG sets out that part of this evidence base is an IDS which sets out the projects in need of funding from CIL (either in part or entirely), the estimated cost of the infrastructure and the proportion of subsidy expected to be provided by CIL and other sources of funding.
- 7.2 The purpose of the IDS is to demonstrate the 'funding gap' between the infrastructure required and the amount of funding already secured or known. It is not a definitive programme of the Council's planned capital expenditure as this will evolve over time.
- 7.3 An assessment of the infrastructure required to support development in the borough was undertaken as part of the evidence base for the Local Development Framework in

¹ See PDCS attached as Appendix A

² See PDCS attached as Appendix A

2010. That assessment was reviewed and updated in 2011 to support the current CIL Charging Schedule and has been further updated to reflect the latest position and priorities and to include / exclude projects that are appropriate to receive CIL funding.

- 7.4 The resulting Draft IDS (attached at Appendix B) identifies a list of infrastructure projects that are required to support development that currently have a funding gap.
- 7.5 The Draft IDS identifies a funding gap of around £4 billion that is required for infrastructure between now and 2026, therefore underlining an overwhelming need for the imposition of CIL on new development.

8. CIL Viability Review

- 8.1 CIL rates cannot be set to reflect the Council's infrastructure funding gap, rather the CIL Regulations clearly set out that the rates must be based on what development can viably afford. In setting the CIL rate, the Council must consider the appropriate balance between the desirability of using CIL to fund the cost of infrastructure required to support new development and the potential effects of CIL on the economic viability of development across the borough.
- 8.2 The Council commissioned consultants that specialise in this work to undertake a 'CIL Viability Review' to establish the rates that could be applied in the borough.
- 8.3 The CIL Viability Review tested generic development types that are expected to come forward across the borough as well as a number of selected 'Strategic Sites' which are considered important in delivering the local plan. The CIL Viability Review took account of all of the policy costs and requirements in the adopted Local Plan and concluded that relatively significant changes could be accommodated to the CIL rate without significantly adversely impacting on viability.
- 8.4 This viability evidence is intended to reflect the overall viability of development typologies (including a number of strategic sites) across the borough, and is not an assessment of individual proposals. It is intended to assist the Council in understanding the general viability of potential development sites to absorb a CIL charge across the borough, recognising that some developments will be unviable regardless of the CIL level set.
- 8.5 A copy of the Community Infrastructure Levy Viability Review Report is attached at Appendix C. The report provides a robust and evidenced assessment that underpins the proposed CIL rates and ensures a balance between CIL and the viability of developments coming forward in the borough.

9. Process for Preparing a CIL

- 9.1 The process for preparing a CIL involves a number of stages which are identified below:
 - 1. Consultation on a preliminary draft charging schedule
 - 2. Consultation on a draft charging schedule
 - 3. Submission of the draft charging schedule to an independent examiner, consultation on any post-submission modifications and examination-in-public.
 - 4. Receipt of the examiners' report and adoption of CIL
- 9.2 The Council is currently at the first stage of the process in terms of revising the existing CIL charging schedule. The PDCS sets out the initial revised proposals for the CIL

rates for consultation. A further consultation on the DCS is anticipated in late 2018 with an examination in public of the revised draft charging schedule anticipated in early 2019. Adoption (subject to receiving a favourable report from the examiner) is currently anticipated in April 2019.

10. Modifications to the Charging Schedule

- 10.1 Section 3 above recommends that the Executive Director of Resources and Regeneration is authorised to approve minor modifications to the PDCS and DCS before and after consultation and approve the referral of the proposed Charging Schedule for examination.
- 10.2 Minor modifications include any changes made for accuracy and clarity such as changes to terminology or formatting, and updates to the IDS, and includes changes to the rates of 10% or less. Substantial (or material) amendments will be referred back to the Mayor and Cabinet and Full Council for approval.

11. Adopting a new Instalments Policy

- 11.1 Approval is being sought to make minor amendments to the Council's CIL Instalments Policy.
- 11.2 The main change to the Instalments Policy is to amend the monetary threshold at which payment can be made in two instalments. Currently, if the amount payable to the Council exceeds £500,000 then payment can be made in two instalments. It is proposed to reduce this threshold to £100,000.
- 11.3 The reason for the proposed change is to reflect the change to the Mayor of London's CIL Instalments policy in respect of the Mayor of London's CIL. The change, which took effect on the 1st January 2018 was proposed to assist Small and Medium Sized Enterprises (SMEs) in paying the levy.
- 11.4 The CIL Regulations set out that an instalment policy must state -
- (a) the date on which it takes effect, which must be no earlier than the day after the instalment policy is published on the website;
 - (b) the number of instalment payments;
 - (c) the amount or proportion of CIL payable in any instalment;
 - (d) the time (to be calculated from the date the development is commenced) that the first instalment payment is due, and the time that any subsequent instalment payments are due; and
 - (e) any minimum amount of CIL below which CIL may not be paid by instalment.
- 11.5 A copy of the proposed Instalments Policy is attached at Appendix F. If approved for adoption, the Instalments Policy will be published on the Council's website and made available at our offices for inspection.

12. Legal Implications

- 12.1 Part 11 of the Planning Act 2008 provides for the introduction of CIL. That Act, as amended, together with the CIL Regulations 2010 as amended, provides the statutory framework for CIL and sets out the statutory requirements for producing a Preliminary Draft Charging Schedule and for changing its instalments policy

- 12.2 The report sets out the stages for adopting a new charging schedule and how the Council is meeting the legal requirements for doing so, as set out in the CIL Regulations.
- 12.3 If members approve the adoption of an updated CIL instalments policy the CIL Regulations prescribe how the change is to be published and is to be made available for public inspection.

13. Crime and disorder implications

- 13.1 There are no direct crime and disorder implications arising from this report.

14. Equalities implications

- 14.1 The Equality Act 2010 (the Act) brings together all previous equality legislation in England, Scotland and Wales. The Act includes a public sector equality duty which covers the following nine protected characteristics: age; disability; gender reassignment, marriage and civil partnership, pregnancy and maternity, race, religion or belief, sex and sexual orientation.
- 14.2 The Council must in the exercise of its functions, have due regard to the need to:
- Eliminate unlawful discrimination, harassment and victimisation and other conduct prohibited by the Act.
 - Advance equality of opportunity between people who share a protected characteristic and those who do not.
 - Foster good relations between people who share a protected characteristic and those who do not.
- 14.3 The Council's Comprehensive Equality Scheme for 2016-20 provides an overarching framework and focus for the Council's work on equalities and helps ensure compliance with the Equality Act 2010.
- 14.4 An equalities analysis was undertaken as part of the preparation of the council's existing CIL charging schedule. This has been updated to reflect the changes proposed in the PDCS. In accordance with the Equality Act 2010, the analysis considers the potential impacts of the charging schedule on those groups identified within the Act as having protected characteristics.
- 14.5 There are no major concerns that have been identified regarding equalities and the overall principles of revising the CIL rate, however, three minor concerns have been identified.
- 14.6 Of minor concern is the process by which developments are made exempt from paying CIL and the Council should take care that any exemptions are applied in accordance with the CIL Regulations and that any 'exceptional circumstances relief' is decided solely on economic viability and no other reason to ensure that no group or sector of the community is disadvantaged.
- 14.6 A further minor concern is how the income from CIL is applied. The money generated through CIL must be spent on infrastructure to support new development in the borough such as schools, hospitals, roads, open space, and leisure facilities. Improved provision of such infrastructure is generally expected to have a positive impact on all people who live, work and visit the borough. The Council will, however, need to ensure

that the process for spending funds raised through CIL is fair and does not discriminate or negatively impact on any particular group or sector of the community. Equalities impacts are also assessed by relevant Council service areas who deliver infrastructure, therefore it is anticipated that the provision of new and improved infrastructure will take any equalities impacts into account during delivery.

- 14.7 The final minor concern identified, is that the CIL Regulations 2010 (as amended) require that 15% of the CIL funds collected are spent on local priorities, or 25% where an area has a Neighbourhood Plan. The Council's proposal to have two charging zones may result in some areas generating more CIL receipts than others due to both the higher charge in zone 1 of the revised Charging Schedule and due to the quantum of development that is likely to come forward in different areas of the borough. The Council is aware of these inherent disparities of CIL and will continue to utilise other funding sources to provide infrastructure and support for all areas of the borough. It should also be noted that CIL funding is used to help deliver 'strategic infrastructure' (i.e. infrastructure that will benefit the entire borough) and therefore any infrastructure will be delivered wherever it is required, for the benefit of the borough as a whole.
- 14.8 Ultimately, CIL is a mechanism intended to raise money to fund infrastructure that will contribute to sustainable development in the borough. In this sense, the adoption of the revised CIL should have an overall positive impact on the various equalities groups. A copy of the full Equalities Analysis Assessment is attached at Appendix E.

15. Environmental implications

- 15.1 Environmental issues are at the heart both of the planning process and the delivery of supporting infrastructure. The CIL Regulations set out that charging authorities must spend the levy on infrastructure needed to support the development of their area. It is likely that over time environmentally beneficial infrastructure projects will receive funding from CIL.

16. Financial Implications

- 16.1 This report concerns the chargeable rate of the Council's Community Infrastructure Levy. The Levy allows local authorities in England and Wales to fund infrastructure by charging on new developments, based on the size and type of the new developments in their area. The money raised can be used to support growth by paying for a wide range of infrastructure that is needed as a result of new development.
- 16.2 Lewisham Council's CIL has applied to liable developments granted on or after 1 April 2015, and the Council has collected £9.3m of levy payments up to 31 March 2018.

17. Conclusion

- 17.1 The Council is recommended to:

1. Approve the PDCS for public consultation.
2. Note the Draft CIL Infrastructure Delivery Schedule, CIL Viability Review Report, Affordable Housing Delivery and Planning Obligations Report and Equalities Analysis Assessment.
3. Authorise the Executive Director, Resources and Regeneration to:

- Approve any minor changes to the text and format of the PDCS and supporting documents prior to consultation;
 - Approve minor modifications to the PDCS and supporting documents following public consultation;
 - Where no material modifications are required to the proposed Charging Schedule following the consultation on the PDCS, approve the undertaking of a subsequent consultation on a DCS; and
 - Where no material modifications are required following the consultation on the DCS, to approve the submission of the Council's proposed Charging Schedule and associated evidence base for public examination.
4. Note that if material modifications to the Charging Schedule following consultation on the PDCS are required, that approval to undertake a subsequent consultation will be referred to back to the Mayor and Cabinet and Full Council.
 5. Approve the adoption of an updated Community Infrastructure Levy Instalments Policy.

18. Background documents and originator

Short Title Document	Date	File Location	File Reference	Contact Officer	Exempt
Planning Act	2008	Laurence House	Strategic Planning	Simon Zelestis	No
Community Infrastructure Levy	2010	Laurence House	Strategic Planning	Simon Zelestis	No
Localism Act	2011	Laurence House	Strategic Planning	Simon Zelestis	No
National Planning Policy Framework (NPPF)	2012	Laurence House	Strategic Planning	Simon Zelestis	No
Planning Obligations Supplementary Planning Document	2015	Laurence House	Strategic Planning	Simon Zelestis	No
CIL Charging Schedule	2015	Laurence House	Strategic Planning	Simon Zelestis	No

If you have any queries on this report, please contact Simon Zelestis, Strategic Planning, 3rd floor Laurence House, 1 Catford Road, Catford SE6 4RU, telephone 020 8314 8701.

Appendix A: Community Infrastructure Levy Preliminary Draft Charging Schedule

Appendix B: Background Paper – Draft Community Infrastructure Levy Infrastructure Delivery Schedule

Appendix C: Background Paper – Community Infrastructure Levy Viability Review Report

- Appendix D:** Background Paper – Affordable Housing Delivery and Planning Obligations Report
- Appendix E:** Background Paper – Equalities Analysis Assessment
- Appendix F:** Community Infrastructure Levy Instalments Policy
- Appendix G:** Mayor and Cabinet Report (6th June 2018)

Appendix G: Mayor and Cabinet Report

Mayor & Cabinet		
Report Title	Community Infrastructure Levy Preliminary Draft Charging Schedule	
Key Decision	YES	Item No.
Ward	All	
Contributors	Head of Planning & Head of Law	
Class	Part 1	Date: 6th June 2018

1. Summary

- 1.4 The Community Infrastructure Levy (CIL) is a levy that local authorities can choose to charge on new development in their area, and which was introduced by the Planning Act 2008. The detailed implementation of CIL is set out in the Community Infrastructure Levy Regulations 2010 (as amended). Local authorities must spend the levy on infrastructure needed to support the development of their area, which can include a wide range of infrastructure such as schools, hospitals, roads, open space, and leisure facilities.
- 1.5 In order to charge CIL, the Council must produce a Charging Schedule which identifies the rate (or rates) for different types of development. In setting the rates for CIL, an appropriate balance must be struck between additional investment to support development and the potential effect on the viability of developments.
- 1.6 The Council adopted its current CIL charging schedule in 2015 based on viability evidence that was produced in 2012. Since that time there have been significant changes in values across the borough. Furthermore, projections made for the five year housing land supply in Lewisham shows a continued strong delivery of housing, supported by an ambitious programme of infrastructure investment and regeneration, including the arrival of the Bakerloo Line Extension. This will likely underpin continued strong value growth in the borough.
- 1.4 The rates proposed in the initial consultation version of the Council's proposed new Charging Schedule ('The Preliminary Draft Charging Schedule 'PDCS') (attached at Appendix A), have been informed by viability evidence prepared by consultants specialising in this work. This evidence is captured in the 'CIL Viability Review Report' (attached at Appendix C).
- 1.5 In accordance with the requirements of the CIL Regulations and associated guidance, a number of other documents support the PDCS including a 'Draft Community Infrastructure Levy Infrastructure Delivery Schedule' (attached at Appendix B) and an 'Affordable Housing Delivery and Planning Obligations Report' (attached at Appendix D).
- 1.6 A minimum of two consultations on a new Charging Schedule are required by the Regulations, first on a PDCS and then on a Draft Charging Schedule ('DCS').

Following this, an examination in public is required and then the Charging Schedule can be adopted by the Council if adoption is recommended by the examiner. The following provides an indicative timescale:

Action	Dates
Consultation on PDCS	23/7 – 3/9
Consideration of responses received	3/9 – 17/9
Consultation on DCS	24/9 – 5/11
Consideration of responses received	5/11 – 3/12
Examination in Public	January 2019
Mayor and Cabinet/Full Council	March 2019
Adoption	April 2019

- 1.7 As part of the CIL review, amendments are also proposed to the Instalments Policy (attached at Appendix F) to reduce the threshold from £500,000 to £100,000 in line with the Mayor of London’s CIL Instalments policy.

2. Purpose

- 2.1 To provide the Mayor and Cabinet with the information needed to approve the PDCS for public consultation.

3. Recommendations

- 3.1 The Mayor (to the extent that it is an executive function) is recommended to:

6. Approve the PDCS for public consultation and recommend that the Full Council do the same.
7. Note the Draft CIL Infrastructure Delivery Schedule, CIL Viability Review Report, Affordable Housing Delivery and Planning Obligations Report and Equalities Analysis Assessment.
8. Delegate authority to the Executive Director, Resources and Regeneration to:
 - Approve any minor changes to the text and format of the PDCS and supporting documents prior to consultation;
 - Approve minor modifications to the PDCS and supporting documents following public consultation;
 - Where no material modifications are required to the proposed Charging Schedule following the consultation on the PDCS, approve the undertaking of a subsequent consultation on a DCS;
 - Where no material modifications are required following the consultation on the DCS, to approve the submission of the Council’s proposed Charging Schedule and associated evidence base for public examination;

and recommend that Full Council do the same.

9. Note that if material modifications to the Charging Schedule following consultation on the PDCS are required, that approval to undertake a subsequent consultation will be referred to back to the Mayor and Cabinet and Full Council.

10. Approve the adoption of an updated Community Infrastructure Levy Instalments Policy and recommend that Full Council do the same.

4. Policy context

4.1 The contents of this report are consistent with the Council's policy framework.

4.2 The PDCS will contribute to the implementation of the Council's ten corporate priorities and will also play an important role in the implementation of the Sustainable Community Strategy ('SCS') (2008-2020) vision 'Together we will make Lewisham the best place to live, work and learn'.

4.3 The PDCS will provide funding and a system to help support the implementation of the SCS vision and all of the six strategic priorities, which are:

- Ambitious and achieving – where people are inspired and supported to fulfil their potential
- Safer – where people feel safe and live free from crime, antisocial behaviour and abuse
- Empowered and responsible – where people are actively involved in their local area and contribute to supportive communities
- Clean, green and liveable – where people live in high quality housing and can care for their environment
- Healthy, active and enjoyable – where people can actively participate in maintaining and improving their health and well-being
- Dynamic and prosperous – where people are part of vibrant communities and town centres, well connected to London and beyond

4.4 The PDCS will also contribute to the implementation of the Council's Corporate Priorities including:

- Community leadership and empowerment – developing opportunities for the active participation and engagement of people in the life of the community;
- Young people's achievement and involvement – raising educational attainment and improving facilities for young people through partnership working;
- Clean, green and liveable – improving environmental management, the cleanliness and care for roads and pavements and promoting a sustainable environment
- Safety, security and a viable presence – partnership working with the police and others and using the Council's power to combat anti social behaviour
- Strengthening the local economy – gaining resources to regenerate key localities strengthen employment skills and promote public transport
- Decent homes for all – investment in social and affordable housing to achieve the decent homes standard, tackle homelessness and supply key worker housing
- Protection of children – better safeguarding and joined up services for children at risk
- Caring for adults and older people – working with health services to support older people and adults in need of care
- Active, healthy citizens – leisure, sporting, learning and creative activities for everyone

5. Background

- 5.1 The CIL is a levy that local authorities can choose to charge on new development in their area. Local authorities must spend the levy on infrastructure needed to support the development of their area, which can include a wide range of infrastructure such as schools, hospitals, roads, open space, and leisure facilities.
- 5.2 Since the introduction of CIL, Section 106 ('S106') planning obligations continue to be used, including to secure affordable housing, but they now have a more restricted role. Local authorities are now not able to pool more than five separate planning obligations to pay for one infrastructure item. The intention of the CIL Regulations is that S106 planning obligations should be used to secure site specific infrastructure which is needed to directly mitigate the impacts of development, whilst CIL is used to help deliver infrastructure to support the development of their area.
- 5.3 In order to charge CIL, local authorities (known as 'charging authorities' under the CIL Regulations) must produce a Charging Schedule which sets out the rate (or rates) for their levy. These rates must be supported by an evidence base including:
- An up to date development plan;
 - The area's infrastructure needs; and
 - An overall assessment of the economic viability of new development
- 5.4 The NPPG states that as background evidence, the charging authority should also provide information about the amount of funding collected in recent years from planning obligations. This should include information on the extent to which affordable housing and other targets have been met.
- 5.5 Once adopted, the levy is a non-negotiable charge on most new development that involves an increase of 100 square metres or more of additional floor space, or the creation of one or more new residential units. The charging authority can set one standard rate or it can set specific rates for different areas, types and scales of development.
- 5.6 Some types of development are exempt from paying the levy such as developments of less than 100 square metres that do not create a new residential unit. In addition, the CIL Regulations also allow exemptions to be claimed for self-build housing and residential annexes and extensions over 100 square metres. Developments by charities of buildings used for charitable purposes and affordable housing is also eligible for relief from CIL.
- 5.7 It should be noted that in London, the Mayor is also a charging authority. The Mayor introduced a CIL (known as 'MCIL1') to fund Crossrail in 2012. The Mayor's levy is currently £35 per square metre in Lewisham, with a limited number of exceptions. On 26 June 2017 the Mayor published for public consultation the Preliminary Draft Charging Schedule for MCIL2 which, if adopted, will increase the current rate in Lewisham to £60 per square metre. The Council collects this levy on behalf of the Mayor.

6. Review of the CIL Charging Schedule

- 6.1 The Council's current CIL Charging Schedule was adopted in 2015. The charging schedule sets out differing rates for residential and other uses. The CIL rates also vary by area, with two separate CIL zones defined in the Charging Schedule. The rates have been subject to indexation on an annual basis in accordance with the CIL Regulations.

- 6.2 Since the evidence base for the current CIL Charging Schedule was prepared, there have been significant changes to sales values and build costs across the borough. That evidence base has been updated through the preparation of the CIL Draft Infrastructure Delivery Schedule ('IDS') and CIL Viability Review report (see Sections 7 and 8 below).
- 6.3 The Draft IDS shows a funding gap of around £900 million. The CIL Regulations state that when deciding the levy rates, an appropriate balance must be struck between additional investment to support development and the potential effect on the viability of developments. In testing alternative CIL rates, the CIL Viability Review report sets out that relatively significant changes to the current CIL rates could be accommodated without significantly adversely impacting on viability.
- 6.4 Consequently, the Council proposes to revise the CIL charging schedule to increase the rate paid by developments as set out in Table 1 below.

Table 1: Current CIL rates, current CIL rates with indexation applied and proposed CIL rates.

Development type	Zone	Adopted rate	Indexed rate	Proposed rate
Residential C3 use class	Zone 1 ³	£100	£112	£200
	Zone 2 ⁴	£70	£79	£125
B use classes	Whole borough	£0	£0	£0
All other uses	Whole Borough	£80	£90	£160

- 6.5 The Council's PDCS (attached as Appendix A) describes the rates proposed in more detail and includes a map showing the 2 charging zones.
- 6.6 Whilst CIL income is very difficult to project, it is estimated that the proposed rates could increase the total CIL income from £39 million to £68 million in today's terms (i.e. before indexation) up to the end of year 2022/23.

7. CIL Infrastructure Delivery Schedule

- 7.1 The Localism Act (2011) requires that in order to set a CIL charging schedule, the Council must use an appropriate evidence base to inform the proposed levy. The NPPG sets out that part of this evidence base is an IDS which sets out the projects in need of funding from CIL (either in part or entirely), the estimated cost of the infrastructure and the proportion of subsidy expected to be provided by CIL and other sources of funding.
- 7.2 The purpose of the IDS is to demonstrate the 'funding gap' between the infrastructure required and the amount of funding already secured or known. It is not a definitive programme of the Council's planned capital expenditure as this will evolve over time.

³ See PDCS attached as Appendix A

⁴ See PDCS attached as Appendix A

- 7.3 An assessment of the infrastructure required to support development in the borough was undertaken as part of the evidence base for the Local Development Framework in 2010. That assessment was reviewed and updated in 2011 to support the current CIL Charging Schedule and has been further updated to reflect the latest position and priorities and to include / exclude projects that are appropriate to receive CIL funding.
- 7.4 The resulting Draft IDS (attached at Appendix B) identifies a list of infrastructure projects that are required to support development that currently have a funding gap.
- 7.5 The Draft IDS identifies a funding gap of around £900 million that is required for infrastructure between now and 2026, therefore underlining an overwhelming need for the imposition of CIL on new development.

8. CIL Viability Review

- 8.1 CIL rates cannot be set to reflect the Council's infrastructure funding gap, rather the CIL Regulations clearly set out that the rates must be based on what development can viably afford. In setting the CIL rate, the Council must consider the appropriate balance between the desirability of using CIL to fund the cost of infrastructure required to support new development and the potential effects of CIL on the economic viability of development across the borough.
- 8.2 The Council commissioned consultants that specialise in this work to undertake a 'CIL Viability Review' to establish the rates that could be applied in the borough.
- 8.3 The CIL Viability Review tested generic development types that are expected to come forward across the borough as well as a number of selected 'Strategic Sites' which are considered important in delivering the local plan. The CIL Viability Review took account of all of the policy costs and requirements in the adopted Local Plan and concluded that relatively significant changes could be accommodated to the CIL rate without significantly adversely impacting on viability.
- 8.4 This viability evidence is intended to reflect the overall viability of development typologies (including a number of strategic sites) across the borough, and is not an assessment of individual proposals. It is intended to assist the Council in understanding the general viability of potential development sites to absorb a CIL charge across the borough, recognising that some developments will be unviable regardless of the CIL level set.
- 8.5 A copy of the Community Infrastructure Levy Viability Review Report is attached at Appendix C. The report provides a robust and evidenced assessment that underpins the proposed CIL rates and ensures a balance between CIL and the viability of developments coming forward in the borough.

9. Process for Preparing a CIL

- 9.1 The process for preparing a CIL involves a number of stages which are identified below:
 5. Consultation on a preliminary draft charging schedule
 6. Consultation on a draft charging schedule
 7. Submission of the draft charging schedule to an independent examiner, consultation on any post-submission modifications and examination-in-public.
 8. Receipt of the examiners' report and adoption of CIL

9.2 The Council is currently at the first stage of the process in terms of revising the existing CIL charging schedule. The PDCS sets out the initial revised proposals for the CIL rates for consultation. A further consultation on the DCS is anticipated in late 2018 with an examination in public of the revised draft charging schedule anticipated in early 2019. Adoption (subject to receiving a favourable report from the examiner) is currently anticipated in April 2019.

10. Modifications to the Charging Schedule following Consultation

10.1 Section 3 above recommends that the Executive Director of Resources and Regeneration is authorised to approve minor modifications to the PDCS and DCS before reporting to Full Council and following consultation and approve the referral of the proposed Charging Schedule for examination.

10.2 Minor modifications include any changes made for accuracy and clarity such as changes to terminology or formatting, and updates to the IDS, and includes changes to the rates of 10% or less. Substantial (or material) amendments will be referred back to the Mayor and Cabinet for approval.

11. Adopting a new Instalments Policy

11.1 Approval is being sought to make minor amendments to the Council's CIL Instalments Policy.

11.2 The main change to the Instalments Policy is to amend the monetary threshold at which payment can be made in two instalments. Currently, if the amount payable to the Council exceeds £500,000 then payment can be made in two instalments. It is proposed to reduce this threshold to £100,000.

11.3 The reason for the proposed change is to reflect the change to the Mayor of London's CIL Instalments policy in respect of the Mayor of London's CIL. The change, which took effect on the 1st January 2018 was proposed to assist Small and Medium Sized Enterprises (SMEs) in paying the levy.

11.4 The CIL Regulations set out that an instalment policy must state -

- (a) the date on which it takes effect, which must be no earlier than the day after the instalment policy is published on the website;
- (b) the number of instalment payments;
- (c) the amount or proportion of CIL payable in any instalment;
- (d) the time (to be calculated from the date the development is commenced) that the first instalment payment is due, and the time that any subsequent instalment payments are due; and
- (e) any minimum amount of CIL below which CIL may not be paid by instalment.

11.5 A copy of the proposed Instalments Policy is attached at Appendix F. If approved for adoption, the Instalments Policy will be published on the Council's website and made available at our offices for inspection.

12. Legal Implications

12.1 Part 11 of the Planning Act 2008 provides for the introduction of CIL. That Act, as amended, together with the CIL Regulations 2010 as amended, provides the statutory framework for CIL and sets out the statutory requirements for producing a Preliminary Draft Charging Schedule and for changing its instalments policy

- 12.2 The report sets out the stages for adopting a new charging schedule and how the Council is meeting the legal requirements for doing so, as set out in the CIL Regulations.
- 12.3 If members approve the adoption of an updated CIL instalments policy the CIL Regulations prescribe how the change is to be published and is to be made available for public inspection.

13. Crime and disorder implications

- 13.1 There are no direct crime and disorder implications arising from this report.

14. Equalities implications

- 14.1 The Equality Act 2010 (the Act) brings together all previous equality legislation in England, Scotland and Wales. The Act includes a public sector equality duty which covers the following nine protected characteristics: age; disability; gender reassignment, marriage and civil partnership, pregnancy and maternity, race, religion or belief, sex and sexual orientation.
- 14.2 The Council must in the exercise of its functions, have due regard to the need to:
- Eliminate unlawful discrimination, harassment and victimisation and other conduct prohibited by the Act.
 - Advance equality of opportunity between people who share a protected characteristic and those who do not.
 - Foster good relations between people who share a protected characteristic and those who do not.
- 14.3 The Council's Comprehensive Equality Scheme for 2016-20 provides an overarching framework and focus for the Council's work on equalities and helps ensure compliance with the Equality Act 2010.
- 14.4 An equalities analysis was undertaken as part of the preparation of the council's existing CIL charging schedule. This has been updated to reflect the changes proposed in the PDCS. In accordance with the Equality Act 2010, the analysis considers the potential impacts of the charging schedule on those groups identified within the Act as having protected characteristics.
- 14.5 There are no major concerns that have been identified regarding equalities and the overall principles of revising the CIL rate, however, three minor concerns have been identified.
- 14.6 Of minor concern is the process by which developments are made exempt from paying CIL and the Council should take care that any exemptions are applied in accordance with the CIL Regulations and that any 'exceptional circumstances relief' is decided solely on economic viability and no other reason to ensure that no group or sector of the community is disadvantaged.
- 14.6 A further minor concern is how the income from CIL is applied. The money generated through CIL must be spent on infrastructure to support new development in the borough such as schools, hospitals, roads, open space, and leisure facilities. Improved provision of such infrastructure is generally expected to have a positive impact on all

people who live, work and visit the borough. The Council will, however, need to ensure that the process for spending funds raised through CIL is fair and does not discriminate or negatively impact on any particular group or sector of the community. Equalities impacts are also assessed by relevant Council service areas who deliver infrastructure, therefore it is anticipated that the provision of new and improved infrastructure will take any equalities impacts into account during delivery.

- 14.7 The final minor concern identified, is that the CIL Regulations 2010 (as amended) require that 15% of the CIL funds collected are spent on local priorities, or 25% where an area has a Neighbourhood Plan. The Council's proposal to have two charging zones may result in some areas generating more CIL receipts than others due to both the higher charge in zone 1 of the revised Charging Schedule and due to the quantum of development that is likely to come forward in different areas of the borough. The Council is aware of these inherent disparities of CIL and will continue to utilise other funding sources to provide infrastructure and support for all areas of the borough. It should also be noted that CIL funding is used to help deliver 'strategic infrastructure' (i.e. infrastructure that will benefit the entire borough) and therefore any infrastructure will be delivered wherever it is required, for the benefit of the borough as a whole.
- 14.8 Ultimately, CIL is a mechanism intended to raise money to fund infrastructure that will contribute to sustainable development in the borough. In this sense, the adoption of the revised CIL should have an overall positive impact on the various equalities groups. A copy of the full Equalities Analysis Assessment is attached at Appendix E.

15. Environmental implications

- 15.1 Environmental issues are at the heart both of the planning process and the delivery of supporting infrastructure. The CIL Regulations set out that charging authorities must spend the levy on infrastructure needed to support the development of their area. It is likely that over time environmentally beneficial infrastructure projects will receive funding from CIL.

16. Financial Implications

- 16.1 This report concerns the chargeable rate of the Council's Community Infrastructure Levy. The Levy allows local authorities in England and Wales to fund infrastructure by charging on new developments, based on the size and type of the new developments in their area. The money raised can be used to support growth by paying for a wide range of infrastructure that is needed as a result of new development.
- 16.2 Lewisham Council's CIL has applied to liable developments granted on or after 1 April 2015, and the Council has collected £9.3m of levy payments up to 31 March 2018.

17. Conclusion

- 17.1 The Mayor is recommended to:
6. Approve the PDCS for public consultation and recommend that the Full Council do the same.
 7. Note the Draft CIL Infrastructure Delivery Schedule, CIL Viability Review Report, Affordable Housing Delivery and Planning Obligations Report and Equalities Analysis Assessment.
 8. Authorise the Executive Director, Resources and Regeneration to:

- Approve any minor changes to the text and format of the PDCS and supporting documents prior to consultation;
- Approve minor modifications to the PDCS and supporting documents following public consultation;
- Where no material modifications are required to the proposed Charging Schedule following the consultation on the PDCS, approve the undertaking of a subsequent consultation on a DCS;
- Where no material modifications are required following the consultation on the DCS, to approve the submission of the Council's proposed Charging Schedule and associated evidence base for public examination;

and recommend that Full Council do the same.

9. Note that if material modifications to the Charging Schedule following consultation on the PDCS are required, that approval to undertake a subsequent consultation will be referred to back to the Mayor and Cabinet and Full Council.
10. Approve the adoption of an updated Community Infrastructure Levy Instalments Policy and recommend that Full Council do the same.

18. Background documents and originator

Short Title Document	Date	File Location	File Reference	Contact Officer	Exempt
Planning Act	2008	Laurence House	Strategic Planning	Sarah Wilks	No
Community Infrastructure Levy	2010	Laurence House	Strategic Planning	Sarah Wilks	No
Localism Act	2011	Laurence House	Strategic Planning	Sarah Wilks	No
National Planning Policy Framework (NPPF)	2012	Laurence House	Strategic Planning	Sarah Wilks	No
Planning Obligations Supplementary Planning Document	2015	Laurence House	Strategic Planning	Sarah Wilks	No
CIL Charging Schedule	2015	Laurence House	Strategic Planning	Sarah Wilks	No

If you have any queries on this report, please contact Sarah Wilks, Strategic Planning, 3rd floor Laurence House, 1 Catford Road, Catford SE6 4RU, telephone 020 8314 2251.

Appendix A: Community Infrastructure Levy Preliminary Draft Charging Schedule

- Appendix B:** Background Paper – Draft Community Infrastructure Levy Infrastructure Delivery Schedule
- Appendix C:** Background Paper – Community Infrastructure Levy Viability Review Report
- Appendix D:** Background Paper – Affordable Housing Delivery and Planning Obligations Report
- Appendix E:** Background Paper – Equalities Analysis Assessment
- Appendix F:** Community Infrastructure Levy Instalments Policy



Community Infrastructure Levy (CIL)

Preliminary Draft Charging Schedule

May 2018

Appendix A

1. The Charging Authority

- 1.1 The London Borough of Lewisham is a 'Charging Authority' for the purposes of Part 11 of the Planning Act 2008 and may therefore charge the Community Infrastructure Levy (CIL) in respect of development in its area.

2. Date of Approval

- 2.1 This Charging Schedule was approved by the Council on DAY/MONTH/YEAR.

3. Date that Effect

- 3.1 This charging schedule will come into effect on DAY/MONTH/YEAR.

4. CIL Rates

- 4.1 The Council intends to charge different rates of CIL by the land use of a proposed development (expressed as pounds per square metre) and by the area where a proposed development is situated, as set out in Table 1 below.

Table 1: Proposed CIL Rates

Development type	Zone	Adopted rate	Indexed rate	Proposed rate
Residential C3 use class	Zone 1	£100	£112	£200
	Zone 2	£70	£79	£125
B use classes	Whole borough	£0	£0	£0
All other uses	Whole Borough	£80	£90	£160

- 4.2 The Council is designated as the 'Collecting Authority' for the Mayor of London's CIL in Lewisham. This requires a current charge of £35 (plus indexation) per square metre to be levied in addition to the amounts specified above.

5. Charging Zones

- 5.1 The two CIL charging zones referred to in the above table are illustrated on the Charging Zone Map attached at Appendix 1 of this document.

6. Liability to Pay CIL

- 6.1 A chargeable development is one for which planning permission is granted and or which is liable to pay CIL in accordance with the CIL Regulations 2010 (as amended). CIL will be chargeable on the net additional floor space (gross internal area) of all new development apart from those exempt under Part 2 and Part 6 of the Community Infrastructure Levy Regulations 2010 (as amended). These exemptions are:

Appendix A

- Developments where the gross internal area of a new building or extensions to buildings will be less than 100 square metres except where the development will compromise one or more dwellings;
- A building for which planning permission was granted for a limited period;
- Buildings into which people do not normally go or go into only intermittently for the purpose of inspecting or maintaining fixed plant or machinery;
- Development where the owner of a material interest in the relevant land is a charitable institution and the development will be used wholly (or mainly) for charitable purposes.

6.2 In addition, the Regulations also allow exemptions to be claimed for self-build housing and residential annexes and extensions over 100 square metres (Regulation 42A and 42B). Affordable housing will be eligible for relief from CIL (Regulation 49).

7. Calculating the Chargeable Amount

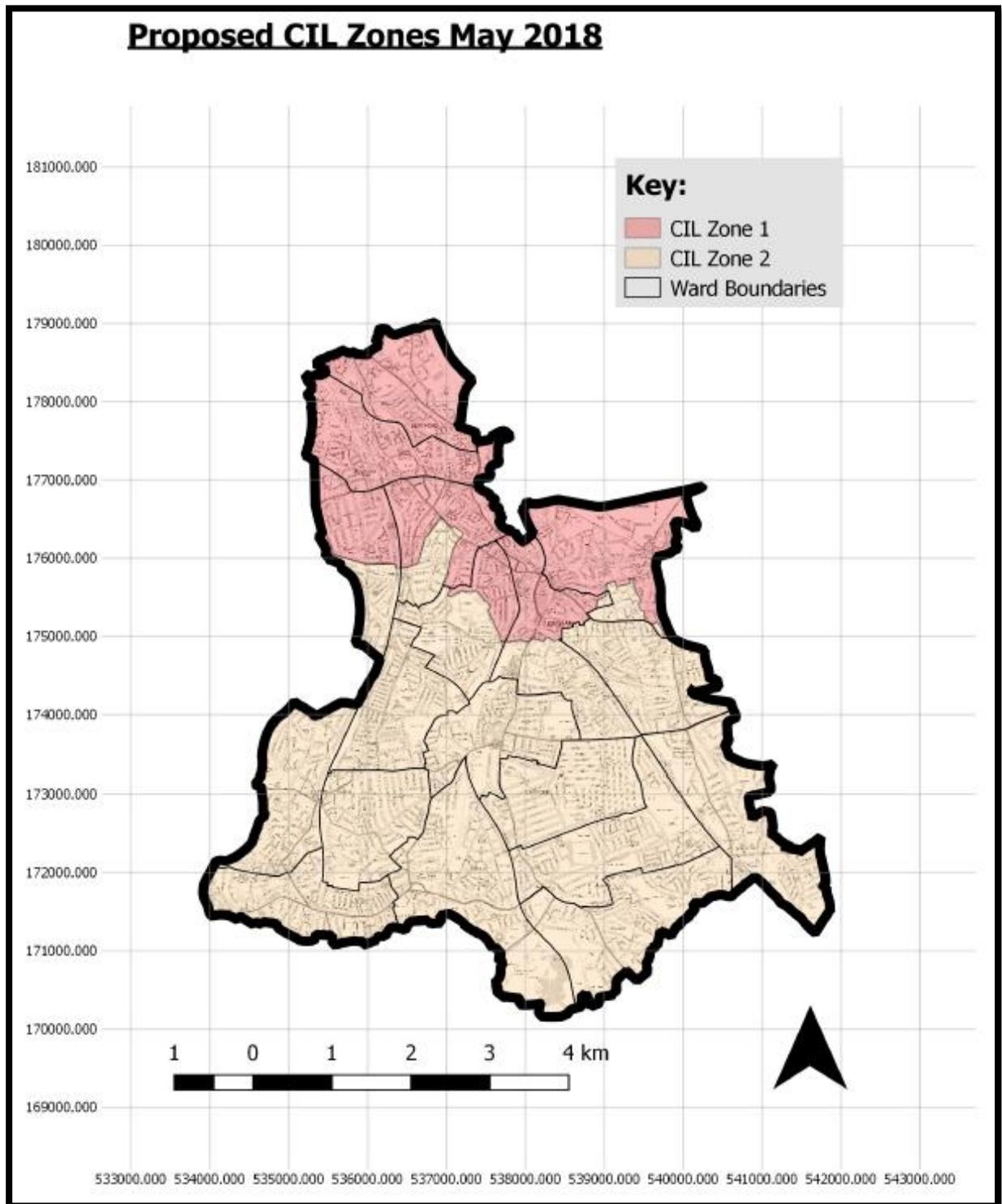
7.1 The amount to be charged for each development will be calculated in accordance with Regulation 40 of the Community Infrastructure Levy Regulations 2010 (as amended). For the purposes of the formulae in paragraph 5 of Regulation 40, the relevant rate (R) is the rate for each charging zone shown in Table 1 above.

8. Inflation and Indexation

8.1 As detailed in the CIL Regulations, the proposed CIL rates will be subject to adjustment on a yearly basis in line with the All-in-Tender Price Index published by the Building Cost Information Service (BCIS).

9. Further Information

9.1 Further information on the Community Infrastructure Levy is available on the Council's website www.lewisham.gov.uk.





Community Infrastructure Levy (CIL)

Draft Infrastructure Delivery Schedule

Ref.	Project Name	Timeframe	Estimated value (Capital costs)	Funding currently secured or identified	Remaining funding gap	Require additional CIL funding / S106?
Health Infrastructure						
H1	North Lewisham Neighbourhood Care Hub (N1 Hub)	Next 1-5 yrs.	c. £1,570,000	-	c. £1,570,000	Yes
H2	Central Lewisham Neighbourhood Care Hub (N2 Hub)	Next 1-5 yrs.	c. £14,000,000	-	c. £14,000,000	Yes
H3	South West Lewisham Neighbourhood Care Hub (N3 Hub)	Next 1-5 yrs.	c. £1,000,000	-	c. £1,000,000	Yes
H4	South East Lewisham Neighbourhood Care Hub (N4 Hub)	Next 1-5 yrs.	c. £6,000,000	-	c. £6,000,000	Yes
H5	Lewisham University Hospital – SLaM Ladywell Unit	Next 1-5 yrs.	TBC	-	TBC	Yes
H6	New Cross Gate NDC Centre – GP surgery	Next 1-5 yrs.	TBC	-	TBC	Yes
H7	Convoys Wharf – New health facility	Yrs. 6-10	TBC	-	TBC	Yes
H8	HUDU Planning contribution (between 2019/20 and 2025/26)	On-going	c. £30,536,000	-	c. £30,536,000	Yes
Community, Sports & Leisure Infrastructure						
C1	New leisure centre facility with lido	TBC	c. £15,000,000	-	c. £15,000,000	Yes
C2	Modern community hubs – North Lewisham	TBC	c. £10,000,000	-	c. £10,000,000	Yes
C3	Modern community hubs – Central Lewisham	TBC	c. £10,000,000	-	c. £10,000,000	Yes
C4	Modern community hubs – South Lewisham	TBC	c. £10,000,000	-	c. £10,000,000	Yes
C5	New artificial football playing pitch at Bellingham	TBC	c. £500,000	-	c. £500,000	Yes
C6	Works to Forster Memorial Park Pavilion	Next 1-5 yrs.	c. £40,000	-	c. £40,000	Yes
C7	Soft play facility at Glassmill Leisure Centre	Next 1-5 yrs.	£250,000	£154,000	£96,000	Yes
C8	Extension to Downham Health & Leisure Car Park	Next 1-5 yrs.	c. £50,000	-	c. £50,000	Yes
C9	Upgrade to Creekside Centre Building	TBC	c. £26,000	-	c. £26,000	Yes
Education Infrastructure						
E1	Alternative provision facility for secondary age students	Next 1-5 yrs.	c. £7,800,000	-	c. £7,800,000	Yes
E2	Alternative provision facility for primary age students	Next 1-5 yrs.	c. £2,400,000	-	c. £2,400,000	Yes
E3	Expansion of Ashmead Primary Sch. (from 1FE to 2 FE)	Next 1-5 yrs.	c. £4,800,000	c. £4,800,000	-	No
E4	Expansion of Watergate Sch. – SEN (standalone extension – 59 places)	Next 1-5 yrs.	c. £3,900,000	c. £3,900,000	-	No
E5	Expansion of Greenvale Sch. – SEN (satellite site – 93 places)	Next 1-5 yrs.	c. £9,090,000	c. £8,090,000	c. £1,000,000	Yes
E6	Remodelling of New Woodlands Sch. (accommodation for KS4 SEMH)	Next 1-5 yrs.	c. £1,690,000	-	c. £1,690,000	Yes
Transport Infrastructure						
T1	Improvement/repair works to highway bridges in the borough	On-going	c. £50,000,000	-	c. £50,000,000	Yes
T2	Improvement/repair works to highway network in the borough	On-going	c. £400,000,000	-	c. £400,000,000	Yes
T3	Bakerloo Line Extension - new stations and other work	Yrs. 6-15	c. £3,600,000,000	-	c. £3,600,000,000	Yes
T4	Works to improve Lewisham Station Interchange	TBC	c. £250,000,000	c. £1,500,000	c. £248,500,000	Yes
T5	New Bermondsey Station - additional Overground station	TBC	c. £12,000,000	c. £10,000,000	c. £2,000,000	Yes

T6	Realignment of A205 South Circular at Catford	Next 1-5 yrs.	c. £30,000,000	c. £10,000,000	c. £20,000,000	Yes
T7	A2 in New Cross – streetscape improvements	TBC	c. £30,000,000	-	c. £30,000,000	Yes
T8	Church Street, Deptford – streetscape improvements	TBC	c. £4,000,000	-	c. £4,000,000	Yes
T9	Lewisham High Street – streetscape improvements	TBC	c. £3,000,000	-	c. £3,000,000	Yes
T10	Deptford Parks & Folkestone Gardens – streetscape improvements	TBC	c. £2,000,000	c. £1,500,000	c. £500,000	Yes
T11	Sydenham Town Centre & Bell Green – streetscape improvements	TBC	c. £750,000	-	c. £750,000	Yes
T12	Brockley Road Corridor – streetscape improvements	TBC	c. £10,000,000	c. £1,600,000	c. £8,400,000	Yes
T13	Kirkdale/Dartmouth Road – streetscape improvements	TBC	c. £1,000,000	-	c. £1,000,000	Yes
T14	Burnt Ash Hill, local shopping parade – streetscape improvements	TBC	c. £750,000	-	c. £750,000	Yes
T15	Hither Green Ln, local shopping centres – streetscape improvements	TBC	c. £1,500,000	-	c. £1,500,000	Yes
T16	Whitefoot Lane – streetscape improvements	TBC	c. £3,000,000	-	c. £3,000,000	Yes
T17	Southend Lane – streetscape improvements	TBC	c. £4,000,000	-	c. £4,000,000	Yes
T18	Creeside public realm – streetscape improvements	TBC	c. £1,000,000	-	c. £1,000,000	Yes
T19	Borough-wide electric vehicle charging infrastructure	TBC	c. £900,000	c. £300,000	c. £600,000	Yes
T20	Borough-wide 20 mph limit measures	TBC	c. £4,000,000	c. £400,000	c. £3,600,000	Yes
T21	Borough-wide Traffic Reduction Strategy measures (active travel)	TBC	c. £4,000,000	c. £250,000	c. £3,750,000	Yes
T22	A21 Cycle Superhighway – Liveable Neighbourhood Corridor	TBC	c. £10,000,000	-	£10,000,000	Yes
T23	Quietway Network – 15 new or enhanced cycle routes	TBC	c. £10,000,000	c. £2,000,000	c. £8,000,000	Yes
T24	North Lewisham Links – enhance facilities for pedestrians and cyclists	TBC	c. £30,000,000	-	c. £30,000,000	Yes
T25	Lewisham Cycle Strategy – key schemes	TBC	c. £5,000,000	c. £300,000	c. £4,700,000	Yes
Green Infrastructure						
G1	Improvement works at Beckenham Place Park	Next 1-5 yrs.	TBC	-	TBC	TBC
G2	Convoys Wharf – 0.45 ha green space & riverside walkways	Yrs. 6-10	TBC	-	TBC	TBC
G3	Lewisham Gateway site – 0.22 ha green space	TBC	TBC	-	TBC	TBC
G4	Amersham Vale - 0.5 ha green space on former sch. site	TBC	c. £600,000	-	c. £600,000	TBC
G5	Ladywell Green – re-landscaping and new play equipment	TBC	TBC	-	TBC	TBC
G6	Lewisham & Catford Flood Alleviation Scheme	TBC	c. £15,000,000	c. £13,900,000	c. £1,100,000	TBC

Infrastructure funding summary

	Estimated value (Capital costs)	Funding currently identified	Remaining funding gap
Health Infrastructure	£53,106,000	£0	£53,106,000
Community, Sports & Leisure Infrastructure	£45,866,000	£154,000	£45,712,000
Education Infrastructure	£29,680,000	£16,790,000	£12,890,000
Transport Infrastructure ¹	£866,900,000	£27,850,000	£839,050,000
Green Infrastructure	£15,600,000	£13,900,000	£1,700,000
<u>Grand Total</u>	<u>£1,011,152,000</u>	<u>£58,694,000</u>	<u>£952,458,000</u>

¹ Estimated value excludes £3.6 billion for the Bakerloo Line Extension ('BLE'). The £3.6 billion relates to the estimated costs of the entire BLE and the expected costs of the Lewisham section of the BLE are currently unknown. The BLE is likely to be part funded by other sources and expected to be delivered by 2028/29, although funding arrangements will need to be secured in advance of this date.

London Borough of Lewisham: Community Infrastructure Levy Viability Review



Prepared for
London Borough of Lewisham

May 2018

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- Appendix 2 - Sites details
- Appendix 3 - Appraisal results with growth
- Appendix 4 - Sample appraisal
- Appendix 5 - Development appraisals

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1 Summary

- 1.1 This report tests the ability of developments to accommodate alternative amounts of Community Infrastructure Levy ('CIL') to the rates contained in the Council's adopted Charging Schedule alongside policies in the London Borough of Lewisham's Local Plan and other emerging planning policy documents.
- 1.2 The study takes account of the cumulative impact of the Council's planning requirements, in line with the requirements of the National Planning Policy Framework ('NPPF') and the Local Housing Delivery Group guidance '*Viability Testing Local Plans: Advice for planning practitioners*'.

Methodology

- 1.3 The study methodology compares the residual land values of a range of development typologies reflecting the types of developments expected to come forward in the borough over the plan period. The appraisals compare the residual land values generated by those developments (with varying levels of affordable housing and CIL contributions) to a benchmark land value to reflect the existing value of land prior to redevelopment. If a development incorporating the Council's policy requirements generates a higher residual land value than the benchmark land value, then it can be judged that the site is viable and deliverable. Following the adoption of policies, developers will need to reflect policy requirements in their bids for sites, in line with requirements set out in the Mayor of London's supplementary planning guidance on 'Affordable Housing and Viability' and in the RICS Guidance on '*Financial Viability in Planning*'¹.
- 1.4 The study utilises the residual land value method of calculating the value of each development. This method is used by developers when determining how much to bid for land and involves calculating the value of the completed scheme and deducting development costs (construction, fees, finance, sustainability requirements and CIL) and developer's profit. The residual amount is the sum left after these costs have been deducted from the value of the development, and guides a developer in determining an appropriate offer price for the site.
- 1.5 The housing and commercial property markets are inherently cyclical and the Council is testing the viability of potential development sites at a time when the market has experienced a period of sustained growth. Forecasts for future house price growth point to continuing growth in mainstream London housing markets, although there is a degree of short term uncertainty following the referendum on the UK's membership of the European Union. We have allowed for this medium term growth over the plan period by running a sensitivity analysis which applies growth to sales values and inflation on costs to provide an indication of the extent of improvement to viability that might result. The assumed growth rates for this sensitivity analysis are outlined in Section 4.
- 1.6 This analysis is indicative only, but is intended to assist the Council in understanding the viability of potential development sites on a high level basis, both in today's terms but also in the future. Some sites may require more detailed viability analysis when they come forward through the development management process due to specific site circumstances that cannot be reflected in an area wide assessment².

¹ This guidance notes that when considering site-specific viability "*Site Value should equate to the market value subject to the following assumption: that the value has regard to development plan policies and all other material planning considerations and disregards that which is contrary to the development plan*". Providing therefore that Site Value does not fall below a site's existing use value, there should be no reason why policy requirements cannot be achieved.

² The Local Housing Delivery Group Guidance '*Viability Testing Local Plans: Advice for Planning Practitioners*' notes that "*the role of the test is not to provide a precise answer as to the viability of every development likely to take place during the plan period. No assessment could realistically provide this level of detail. Some site-specific tests are still likely to be required at the development management stage*".

Key findings

1.7 The key findings of the study are as follows:

- The Council's adopted CIL rates have been in place since 1 April 2015 and there has been no demonstrable adverse impact on the supply of housing land or upon the viability of developments coming forward across the Borough. Since the evidence base for the adopted CIL was prepared, there have been increases to sales values and build costs. Our testing of alternative CIL rates indicates that relatively significant changes could be accommodated without adversely impacting on viability to a sufficient degree to impact on land supply.
- As a result of indexation, the CIL rates are now circa 12% higher than they were adopted. The proposed Mayoral CIL will also increase from £35 per square metre to £60 per square metre in April 2019 if the rates are not amended through the Examination process.

Residential rates

- The proposed CIL rates are summarised in Table 1.7.1. Sales values have increased at a faster rate than build costs since the adopted CIL rates were tested and as a consequence, residential schemes can absorb higher levels of CIL. Some developments in Zone 1 will benefit from the opportunities derived from the Bakerloo Line Extension, which will enable developers to benefit from increased development opportunities and higher sales values. An increase to £200 per square metre in an enlarged Zone 1 will secure much needed additional income to assist with provision of infrastructure that these developments will require.

B class uses

- The borough is still seeing losses of B use class floorspace and our testing confirms that new office and industrial development is unlikely to be able to make a significant contribution towards infrastructure. The viability testing shows that a modest contribution of circa £20 per square metre could in principle be applied to B use class developments without significant impact on the likelihood of developments coming forward. However, given continuing losses of B use class floorspace, it is very unlikely that applying CIL to any developments that might come forward would generate any contributions to infrastructure.

Other uses

- Other uses covered by the existing "all other uses" rate in the adopted CIL Charging Schedule (retail, student housing and hotels) show varying viability but the evidence points to an increase from the current £80 per square metre charge (£90 after indexation) to £160 per square metre.

Strategic sites

- With the exception of Strategic Site 3, the other 6 strategic sites are located within the expanded Zone 1. Strategic Site 3 is located on the border of Zones 1 and 2, but is able to absorb a CIL at and increased rate of £125 per square metre alongside affordable housing of between 30% and 35% affordable housing.
- The other strategic sites will also be able to absorb the proposed rate of £200 per square metre alongside varying levels of affordable housing, ranging from 10% to 30% affordable housing. Clearly on these sites there is potential for the Council to maintain or increase affordable housing on these sites by funding community infrastructure using CIL or other Council resources. There is no compelling evidence to adopt alternative rates of CIL on these sites.

Proposed rates

- Our proposed CIL rates are summarised in Table 1.7.1.

Table 1.7.1: Proposed changes to CIL rates

Development type	Zone	Adopted rate	Indexed rate	Proposed rate
Residential C3 use class	Zone 1 ³	£100	£112	£200
	Zone 2 ⁴	£70	£79	£125
B use classes	Whole borough	£0	£0	£0
All other uses	Whole Borough	£80	£90	£160

- Our testing indicates that the increase in CIL rates will have a relatively modest impact on residual land values in most cases. In almost all cases, increases in sales values (in excess of cost increases) will have enhanced the capacity of developments to absorb increased CIL rates. In the isolated cases where a scheme is on the margins of viability where it is not possible to pass the cost of increased CIL rates back to the landowner through a reduction in land value (for example, due to high existing use values), the increase in CIL will have a modest impact on affordable housing levels that can be delivered.
- The proposed CIL typically amounts to 3.5% to 3.75% of development costs and is therefore not a critical determinant in the viability of developments.
- Some scenarios (e.g. certain affordable housing percentages) are unviable prior to the application of CIL in the appraisal. There is clearly an important distinction to be drawn between these schemes and those that are viable. Where schemes are viable, the proposed CIL rates are sufficiently modest to ensure that schemes remain viable.
- There is clearly a need to balance the need to deliver affordable housing with the need to secure contributions to fund community infrastructure that will support development and growth. The Council cannot seek to prioritise securing affordable housing and other Local Plan policies (as summarised in Section 2) to the exclusion of securing funding for infrastructure and vice versa. In our view, the proposed rates strike this balance appropriately.
- The Council needs to strike a balance between achieving its aim of meeting needs for affordable housing with raising funds for infrastructure, and ensuring that developments generate acceptable returns to willing landowners and willing developers. This study demonstrates that the Council's approach to applying its affordable housing requirements⁵ ensures that these objectives are balanced appropriately.

³ Postcode sectors SE3, SE8, SE10 and SE16 and the Bakerloo Line Extension corridor to Lewisham (the latter extending zone 1 to a 1 kilometre radius around Lewisham Station, reflecting the area which will benefit from increasing sales values resulting from access to London Underground services. This reflects the approach adopted by TfL for determining the extent of Crossrail Section 106 contributions around stations which will benefit from Crossrail services.

⁴ Postcode sectors BR1, BR3, SE4, SE9, SE12, SE13, SE14, SE15, SE23 and SE26

⁵ The Council's strategic 50% affordable housing target is subject to individual scheme viability which in practice means that a range of percentages is delivered up to this target level.

2 Introduction

- 2.1 The Council has commissioned this study to consider the ability of developments to accommodate alternative amounts of Community Infrastructure Levy ('CIL') to the rates contained in the Council's adopted Charging Schedule alongside policies in the Local Plan and other emerging planning policy documents. The aim of the study is to assess at high level the viability of development typologies representing the types of sites that are expected to come forward to test alternative CIL rates to those in the adopted Charging Schedule.
- 2.2 In terms of methodology, we adopted standard residual valuation approaches to test the viability of development typologies, including the impact on viability of the Council's proposed (and existing) planning policies alongside adopted and alternative levels of CIL. However, due to the extent and range of financial variables involved in residual valuations, they can only ever serve as a guide. Individual site characteristics (which are unique), mean that conclusions must always be tempered by a level of flexibility in application of policy requirements on a site by site basis.
- 2.3 In light of the above we would highlight that the purpose of this viability study is to assist the Council in understanding changes to the capacity of schemes to absorb CIL and to support any proposed changes to the Charging Schedule through Examination in Public. The Study therefore provides an evidence base to show that the requirements set out within the NPPF, CIL regulations and National Planning Practice Guidance are satisfied. The key underlying principle is that charging authorities should use evidence to strike an appropriate balance between the desirability of funding infrastructure from the levy and the potential impact upon the economic viability of development across their area.
- 2.4 As an area wide study this assessment makes overall judgements as to viability of development within the London Borough of Lewisham and does not account for individual site circumstances. The assessment should not be relied upon for individual site applications. However, an element of judgement has been applied within this study with regard to the individual characteristics of the strategic sites tested. The schemes tested on these sites are based on assessments of likely development capacity on the sites by the Council and clearly this may differ from the quantum of development in actual planning applications that will come forward. Scheme specific testing may still be required at the point where they come forward.
- 2.5 This position is recognised within Section 2 of the Local Housing Delivery Group guidance, which identifies the purpose and role of viability assessments within plan-making. This identifies that: *"The role of the test is not to give a precise answer as to the viability of every development likely to take place during the plan period. No assessment could realistically provide this level of detail. Some site-specific tests are still likely to be required at the development management stage. Rather, it is to provide high level assurance that the policies within the plan are set in a way that is compatible with the likely economic viability of development needed to deliver the plan."*

Economic and housing market context

- 2.6 The housing and commercial property markets are inherently cyclical. The downwards adjustment in house prices in 2008/9 was followed by a prolonged period of real house price growth. By 2010 improved consumer confidence fed through into more positive interest from potential house purchasers. However, this brief resurgence abated with figures falling and then fluctuating in 2011 and 2012. The improvement in the housing market towards the end of 2012 continued through into 2013 at which point the growth in sales values improved significantly through to the last quarter of 2014, where the pace of the improvement was seen to moderate and continued to do so in 2015. The UK economy sustained momentum following the result of the UK's referendum on its membership of the European Union (EU), and as a result the UK housing market surprised many in 2016. The average house price rose 4.5%, which was 0.2% lower than our forecast and ahead of the level recorded in 2015. While first time buyer numbers continued to recover in 2016, overall transaction levels slowed as some home movers and investors withdrew from the market.
- 2.7 The referendum held on 23 June 2016 on the UK's membership of the EU resulted in a small

majority in favour of exit. The immediate aftermath of the result of the vote was a fall in the Pound Sterling to a 31 year low and stocks overselling due to the earnings of the FTSE being largely in US Dollars. As the Pound dropped significantly this supported the stock market, which has since recouped all of the losses seen and is near the all-time highs. We are now in a period of uncertainty in relation to many factors that impact the property investment and letting markets. In March 2017, the Sterling Exchange Rate Index fell a further 1.5% from the end of February and was 10.5% lower compared with the end of March 2016. However in other areas there are tentative signs of improvement and resilience in the market. For example, the International Monetary Fund revised its forecast for UK growth in 2016 on 4 October 2016 from 1.7% to 1.8%, thereby partly reversing the cut it made to the forecast shortly after the referendum (1.9% to 1.7%). However it further trimmed its 2017 forecast from 1.3% to 1.1%, which stood at 2.2% prior to the Referendum.

- 2.8 The UK's first official growth figures since the referendum result vote exceeded initial estimates. Growth for Q3 according to the ONS figures was 0.5%, higher than analyst's predictions of 0.3%. The ONS highlighted that *"the pattern of growth continues to be broadly unaffected following the EU referendum"*. Initial expectations were that the better than expected GDP figures would deter the Bank of England Monetary Policy Committee from going ahead with any further or planned interest rate cuts. The Economy slowed slightly from the Q2 figure of 0.7% and the pattern was a slightly unbalanced one with services being the only sector continuing to grow, achieving a rate of 0.8%. The Chancellor, Phillip Hammond, noted at the time that *"the fundamentals of the UK economy are strong and today's data show that the economy is resilient"*. Production increased by 1.6% in the 3 months to February 2017 and manufacturing increased by 2.2% over the same period. Notwithstanding this the ONS indicate that *"manufacturing is dependent upon both domestic and overseas demand for UK produced goods. Changes in output will reflect both domestic demand and how UK trade is faring post-referendum"*; especially as Article 50 has now been triggered and the negotiation process to leave the EU is underway. Data from the construction sector indicated that the quarterly movement shows a growth of 1.5% in output, which the ONS state *"may act as an indicator of how confident enterprises are in investing in buildings and the infrastructure as longer term assets"*.
- 2.9 It was further expected that manufacturing would be bolstered by the fall in the value of the pound; however this failed to materialise. Despite this, the ONS Head of GDP Darren Morgan observed that *"the economy grew slightly more in the last three months of 2016 than previously thought, mainly due to a stronger performance from manufacturing"*.
- 2.10 The Office of Budgetary Responsibility's 'Economic and fiscal outlook' report (November 2017) indicates that UK GDP slowed to an annualised rate of 1.2% over the first three quarters of 2017, caused largely by the impact of the fall in sterling feeding through into consumer facing services. In addition, the construction sector saw output fall in the second and third quarters of the year.
- 2.11 BNP Paribas Real Estate's UK Housing Market Prospects Q3 2017 report indicates that *"our Q2 forecast for a period of muted activity and price change remain unchanged"*. In this report we note that *"we expect the average UK house price to rise by around 3.5%, effectively remaining close to flat in real terms given the current pace of inflation. We expect the average UK home to have increased in value by 13.7% or just over £28,000 over the next four years. This translates to an average UK house price increase of 3.4% per annum, although given the political and economic uncertainties ahead, the journey is unlikely to feel quite so benign with the average masking inevitable volatility"*.
- 2.12 The May Halifax House Price Index Report identifies that overall prices in the three months to April were marginally lower than in the preceding three months; the first quarterly decline since November 2012. The annual rate of growth remained at 3.8% in April, the lowest rate since May 2013. Martin Ellis, the Halifax housing economist comments that, *"Housing demand appears to have been curbed in recent months due to the deterioration in housing affordability caused by a sustained period of rapid house price growth during 2014-16. Signs of a decline in the pace of job creation, and the beginnings of a squeeze on households' finances as a result of increasing inflation may also be constraining the demand for homes"*.
- 2.13 This view is shared by Robert Gardiner, Nationwide's Chief Economist, who comments in their April

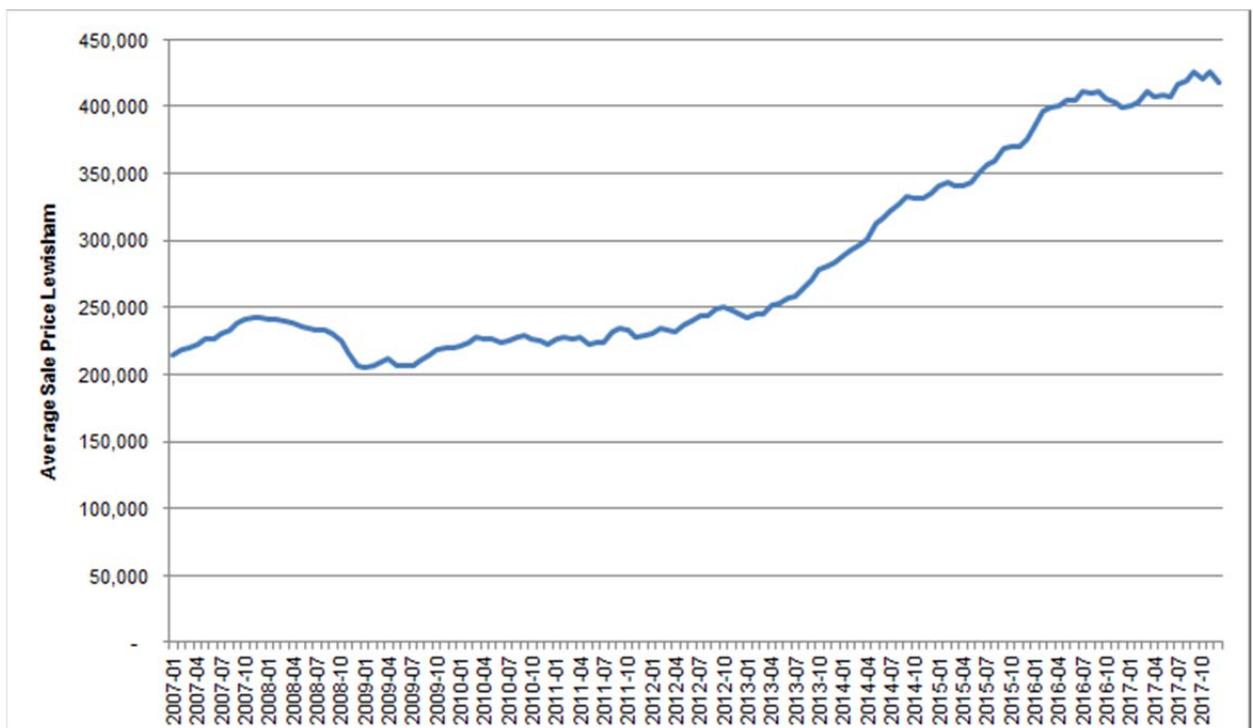
House Price Index report, that “in some respects, the softening in house price growth is surprising because the unemployment rate is near to a 40-year low, confidence is still relatively high and mortgage rates have fallen to new all-time lows in recent months”. However he balances this by highlighting that, “while monthly figures can be volatile, the recent softening in price growth may be a further indication that households are starting to react to the emerging squeeze on real incomes or to affordability pressures in key parts of the country”.

- 2.14 Notwithstanding the above both the Halifax and Nationwide consider that a combination of the continuing low mortgage rates, together with an on-going acute shortage of properties on the market should support house prices. Nationwide conclude that as a result they remain of the opinion that “a small increase in house prices of around 2% is likely over the course of 2017 as a whole”. However, the outcome of the General Election on 8 June which saw the Conservative Party lose its majority may result in additional uncertainty in the short term, both in terms of the content of a legislative programme but also the negotiations on the UK’s exit from the EU. These factors may impact on buyer activity.

Local Housing Market Context

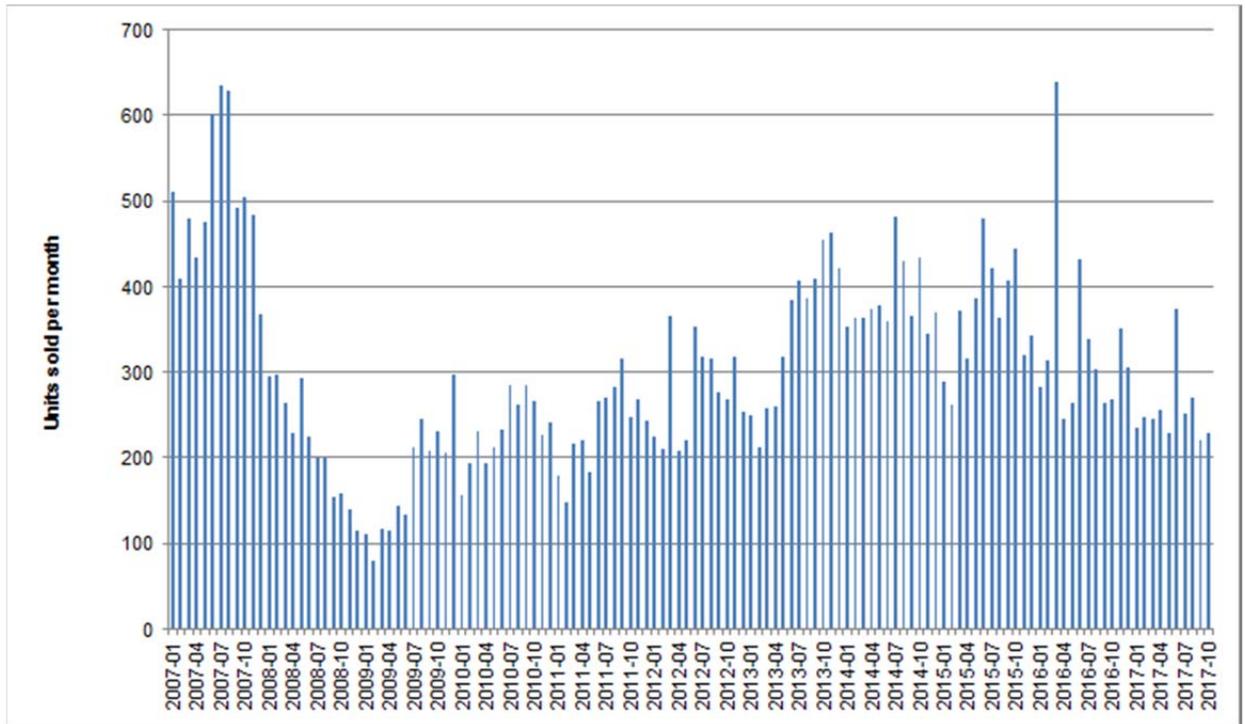
- 2.15 House prices in the London Borough of Lewisham have followed recent national trends, with values falling in 2008 to 2009 and recovering over the intervening years, as shown in Figure 2.15.1. Sales volumes fell below historic levels between 2009 and 2012, but have since recovered (see Figure 2.15.2). By November 2017, sales values had increased by 138% in comparison to the lowest point in the cycle in June 2009, or 109% higher than the previous peak in July 2008.

Figure 2.15.1: Average sales value in Lewisham



Source: Land Registry

Figure 2.15.2: Sales volumes in Lewisham (sales per month)

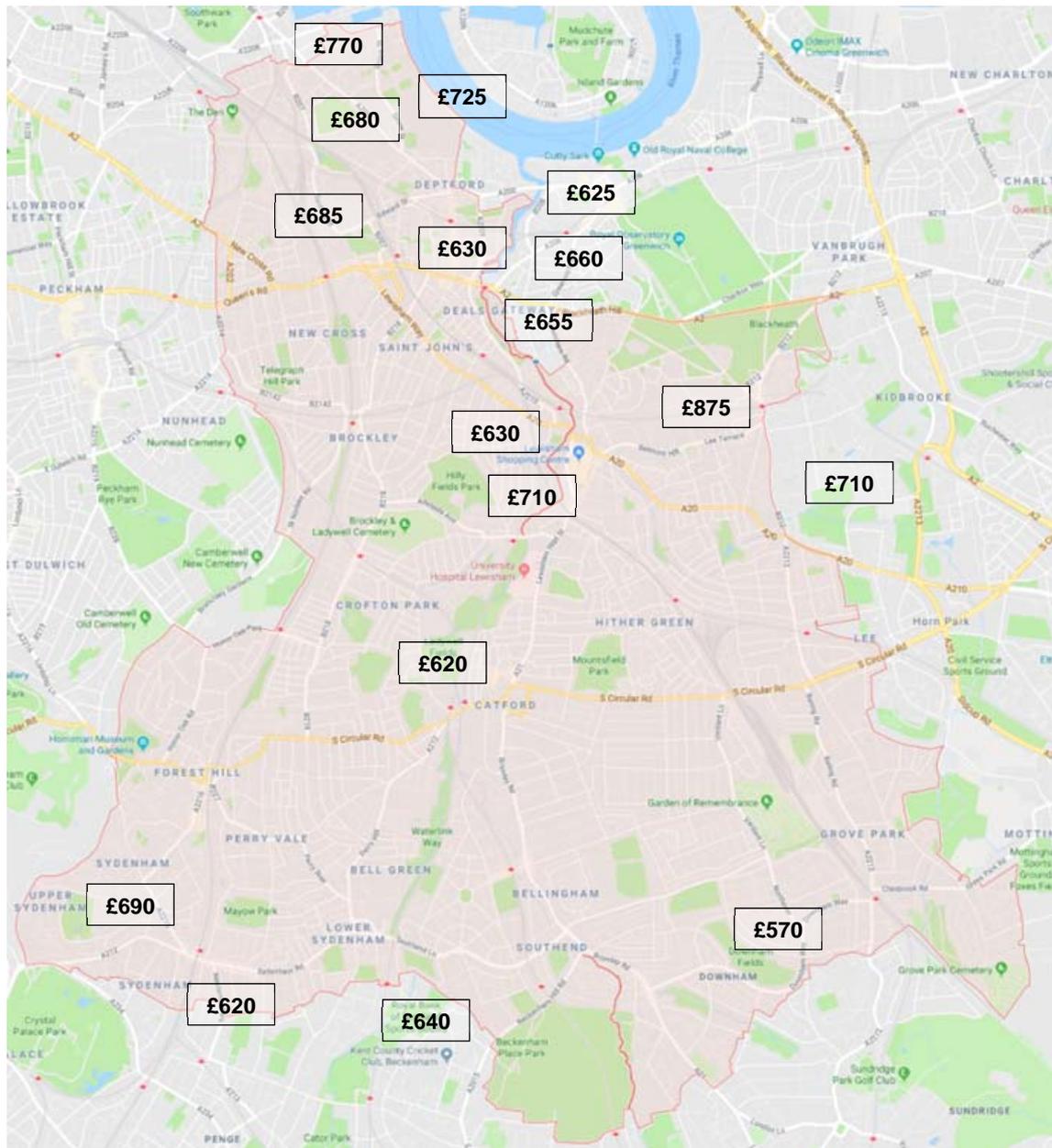


Source: Land Registry

- 2.16 The future trajectory of house prices is currently uncertain, although Savills' *Residential Property Forecasts Autumn 2017* prediction is that values are expected to increase over the next five years. Medium term predictions are that properties in mainstream London markets will grow over the period between 2018 and 2022. Savills predict that values in mainstream London markets (i.e. non-prime) will fall by 2% in 2018, remain unchanged in 2019 but will increase by 5% in 2020, 2% in 2021 and 2% in 2022. This equates to cumulative growth of 7.1% between 2018 and 2022 inclusive.
- 2.17 In common with other Boroughs in London, there are variations in sales values between different parts of Lewisham, as shown in Figure 2.17.1⁶. However, the variations in Lewisham are far narrower than in some other boroughs in London. Highest sales values are achieved in the north of the borough and Blackheath, while values in the south-east of the borough are marginally lower.

⁶ Some of the price points in Figure 2.17.1 are for schemes in neighbouring boroughs close to the border with Lewisham

Figure 2.17.1: Sales values in Lewisham (approx. £s per square foot)



Sources: Map – Google; Values – Molior

Private rented sector market context

- 2.18 The proportion of households privately renting is forecast to increase from under 10% in 1991 to circa 25% by 2021, largely as a result of affordability issues for households who would have preferred to owner occupy⁷. Over the same period, the proportion of households owner occupying is forecast to fall from 69% to under 60%. These trends are set to continue in the context of a significant disparity between average household incomes and the amounts required to purchase a residential property in the capital.
- 2.19 Perceived softening of the housing for sale market has prompted developers to seek bulk sales to PRS operators, with significant flows of investment capital into the sector. Investment yields have

⁷ Knight Frank PRS Update August 2017

remained stable in the zones 2 to 4 London market at 3.5% to 4%. PRS housing as an asset class is still emerging and valuation portfolios and development opportunities is difficult in the context of lack of data. As the market matures, more information will become available, facilitating more sophisticated approaches to valuing and appraising PRS developments.

- 2.20 The PRS market is still immature and as a consequence there is little data available on management costs and returns that would assist potential entrants into the market. However, viability assessments of schemes brought forward to date confirm that profit margins are lower than build for sale on the basis that a developer will sell all the PRS units in a single transaction to an investor/operator. The income stream is therefore akin to a commercial investment where a 15% profit on GDV is typically sought.
- 2.21 A reduced profit margin helps to compensate (to some degree) for the discount to market value that investors will seek. PRS units typically transact at discounts of circa 20% of market value on the basis of build to sell.
- 2.22 On larger developments, PRS can help to diversify the scheme so that the Developer is less reliant on build to sell units. Building a range of tenures will enable developers to continue to develop schemes through the economic cycle, with varying proportions of units being provided for sale and rent, depending on levels of demand from individual purchasers. However, demand for build for rent product will also be affected by the health of the economy generally, with starting and future rent levels more acutely linked to changes in incomes of potential tenants.

National Policy Context

The National Planning Policy Framework

- 2.23 In March 2012, the old suite of planning policy statements and planning policy guidance was replaced by a single document – the National Planning Policy Framework ('NPPF'). The NPPF has subsequently been supplemented by the National Planning Practice Guidance ('NPPG').
- 2.24 The NPPF provides more in-depth guidance on viability of development than Planning Policy Statement 3, which limited its attention to requiring local planning authorities to test the viability of their affordable housing targets. The NPPF requires that local planning authorities have regard to the impact on viability of the *cumulative effect* of all their planning requirements on viability. Paragraph 173 of the NPPF requires that local planning authorities give careful attention "*to viability and costs in plan-making and decision-taking*". The NPPF requires that "*the sites and the scale of development identified in the plan should not be subject to such a scale of obligations and policy burdens that their ability to be developed viably is threatened*". After taking account of policy requirements, land values should be sufficient to "*provide competitive returns to a willing landowner and willing developer*".
- 2.25 The meaning of a "*competitive return*" has been the subject of considerable debate over the past year. For the purposes of testing the viability of a Local Plan, the Local Housing Delivery Group⁸ has concluded that the current use value of a site (or a credible alternative use value) plus an appropriate uplift, represents a competitive return to a landowner. Some members of the RICS consider that a competitive return is determined by market value⁹, although there is no consensus around this view. The government's draft NPPF issued for consultation in March 2018 removes the requirement for "competitive returns" and is silent on how landowner returns should be assessed. The draft PPG issued at the same time indicates that viability testing of plans should be based on existing use value plus a landowner premium.

CIL Policy Context

- 2.26 As of April 2015 (or the adoption of a CIL Charging Schedule by a charging authority, whichever was the sooner), the 'S106/planning obligations system' i.e. the use of 'pooled'

⁸ Viability Testing Local Plans: Advice for planning practitioners, June 2012

⁹ RICS Guidance Note: Financial Viability in Planning, August 2012

S106 obligations, was limited to a maximum of five S106 agreements. The adoption of a CIL charging schedule is discretionary for a charging authority; however, the scaling back of the use of pooled S106 obligations is not discretionary. As such, should the Council elect not to adopt a CIL Charging Schedule, it may have implications with regard to funding infrastructure in the District in future and the Council will need to be aware of such implications in their decision-making.

- 2.27 It is worth noting that some site specific S106 obligations remain available for negotiation, however these are restricted to site specific mitigation that meet the three tests set out at CIL Regulation 122 and to the provision of affordable housing. They cannot be used for securing payments towards infrastructure¹⁰ that benefit more than one development, unless they form part of a maximum of five S106 agreements, from which contributions to provide infrastructure can be pooled.
- 2.28 The CIL regulations state that in setting a charge, local authorities must strike “an appropriate balance” between revenue maximisation on the one hand and the potentially adverse impact upon the viability of development on the other. The regulations also state that local authorities should take account of other sources of available funding for infrastructure when setting CIL rates. This report deals with viability only and does not consider other sources of funding (this is considered elsewhere within the Council’s evidence base).
- 2.29 Local authorities must consult relevant stakeholders on the nature and amount of any proposed CIL at two stages; after publication of the Preliminary Draft Charging Schedule (“PDCS”) and the Draft Charging Schedule (“DCS”). Following consultation, a charging schedule must be submitted for independent examination.
- 2.30 The payment of CIL becomes mandatory on all new buildings and extensions to buildings with a gross internal floorspace over 100 square metres once a charging schedule has been adopted. The CIL regulations allow a number of reliefs and exemptions from CIL. Firstly, affordable housing and buildings with other charitable uses (if a material interest in the land is owned by the charity and the development is to be used wholly or mainly for its charitable purpose) are subject to relief. Secondly, local authorities may, if they choose, elect to offer an exemption on proven viability grounds. A local authority wishing to offer exceptional circumstances relief in its area must first give notice publicly of its intention to do so. The local authority can then consider claims for relief on chargeable developments from landowners on a case by case basis. In each case, an independent expert with suitable qualifications and experience must be appointed by the claimant with the agreement of the local authority to assess whether paying the full CIL charge would have an unacceptable impact on the development’s economic viability.
- 2.31 The exemption would be available for 12 months, after which time viability of the scheme concerned would need to be reviewed. To be eligible for exemption, regulation 55 states that the Applicant must enter into a Section 106 agreement; and that the Authority must be satisfied that granting relief would not constitute state aid. It should be noted however that CIL cannot simply be negotiated away or the local authority decide not to charge CIL.
- 2.32 CIL Regulation 40 includes a vacancy period test for calculating CIL liability so that vacant floorspace can be offset in certain circumstances. That is where a building that contains a part which has not been in lawful use for a continuous period of at least six months within the last three years, ending on the day planning permission first permits the chargeable development, the floorspace may not be offset.
- 2.33 The CIL regulations enable local authorities to set differential rates (including zero rates) for different zones within which development would take place and also for different types of development. The CIL Guidance set out in the NPPG (paragraph 022 Reference ID: 25-022-20140612) clarifies that CIL Regulation 13 permits charging authorities to levy

¹⁰ This infrastructure should not be identified on the Council’s Regulation 123 list.

“differential rates by reference to different intended uses of development.” Charging Authorities taking this approach need to ensure that such different rates are justified by a comparative assessment of the economic viability of those categories of development. Further the NPPG clarifies that the definition of “use” for this purpose is not tied to the classes of development in the Town and Country Planning Act (Use Classes) Order 1987, although that Order does provide a useful reference point.’ The NPPG also sets out (paragraph 023 Reference ID: 25-023-20140612) that charging authorities may also set differential rates in relation to, scale of development i.e. by reference to either floor area or the number of units or dwellings.

- 2.34 The 2010 CIL regulations set out clear timescales for payment of CIL, which are varied according to the size of the payment, which by implication is linked to the size of the scheme. The 2011 amendments to the regulations allowed charging authorities to set their own timescales for the payment of CIL if they choose to do so. This is an important issue that the Council will need to consider, as the timing of payment of CIL can have an impact on an Applicant’s cashflow (the earlier the payment of CIL, the more interest the Applicant will bear before the development is completed and sold).
- 2.35 The Government published the findings of the independent CIL review alongside the Housing White Paper in February 2017. The White Paper identified at paragraph 2.28 that the Government *“continue to support the existing principle that developers are required to mitigate the impacts of development in their area, in order to make it acceptable to the local community and pay for the cumulative impacts of development on the infrastructure of their area.”* The White Paper summarised the main finding of the CIL review to be that *“the current system is not as fast, simple, certain or transparent as originally intended.”*
- 2.36 As a result the Government committed to *“examine the options for reforming the system of developer contributions including ensuring direct benefit for communities, and will respond to the independent review and make an announcement at Autumn Budget 2017.”* At this stage there is no further information as to whether the Government will implement the independent CIL review panel’s recommendations for reform to the approach of calculating and securing developer contributions towards infrastructure required to support development and if so what the transition period will be.
- 2.37 The government’s recent consultation on changes to the NPPF includes proposed reforms of CIL, including the following potential changes:
- The potential for councils to adopt Strategic Infrastructure Tariffs (‘SITs’) to fund strategic infrastructure that cross borough boundaries. Any potential SIT proposals would need to be factored into the viability testing to ensure rates of CIL that are set are viable alongside SITs and Local Plan policies.
 - Potential changes to the approach to consultation with stakeholders, with the current formal process replaced with a statement on how the Authority has engaged, which would form part of the Examination in Public.
 - Potential removal of pooling restrictions on Section 106. If councils intend to collect funds for infrastructure through pooled contributions, any such contributions would need to be incorporated into viability testing to ensure that the CIL rates charged alongside Section 106 remain viable.
 - Encouragement for setting specific rates for all uses on large strategic developments would require the testing of individual strategic sites to determine an appropriate and specific rate. Councils would need to identify which sites this may apply to.
 - Setting rates according to existing uses of sites is a key change proposed by the government. This would enable councils to set higher rates on sites that are currently in low value uses (e.g. secondary industrial).

- Changes to the way CIL is indexed, moving from indexation by reference to changes in build costs to changes in values across the borough.

Mayoral CIL

- 2.38 The Borough is located within Mayoral CIL Zone 2, which attracts a rate of £35 per square metre before indexation¹¹ which has been used to fund circa £300 million of the costs of the Crossrail construction project. The consultation on the proposed amendments to the Mayoral CIL indicates that a rate of £60 per square metre will be levied in Lewisham. Future receipts from the Mayoral CIL will be used to contribute towards funding Crossrail 2 (a north-east to south-west line) to relieve pressure on existing transport networks.

Borough CIL

- 2.39 The Council approved its CIL Charging Schedule on 25 February 2015 and it came into effect on 1 April 2015. Table 2.39.1 below summarises the prevailing rates of CIL. For C3 residential developments in the north of the borough (New Cross Gate, Deptford and Lewisham), the adopted rate is £100 per square metre. In all other parts of the borough, the rate for residential developments is £70 per square metre. Developments within B use classes are nil rated, while all other uses not specified attract a charge of £80 per square metre.

Table 2.39.1: CIL rates per net additional square metre in the Charging Schedule

Development type	Zone	Adopted rate
Residential C3 use class	Zone 1 ¹²	£100
	Zone 2 ¹³	£70
B use classes	Whole borough	£0
All other uses	Whole Borough	£80

- 2.40 In 2015/16, the Council collected CIL payments totalling £1,440,464. This was the first year that CIL was in place in Lewisham and clearly it is unlikely that many schemes actually consented after 1 April 2015 would have actually started on site or reached a point in construction where CIL payments are triggered. The receipts for 2016/17 total £4.49 million, which is a significant increase in receipts in comparison to the first year CIL was in force. The level of CIL receipts in Lewisham is higher than neighbouring boroughs Southwark and Greenwich - where CIL was adopted at the same time – but lower than Tower Hamlets. However, this can be explained by the significantly higher level of housing delivery in Tower Hamlets in that year compared to Lewisham.

Table 2.40.1: CIL receipts of neighbouring boroughs

Borough	Adoption date	Income 2014/15	Income 2015/16	Income 2016/17	No of housing units completed ¹⁴ 2015/16
Lewisham	1/4/15	-	£1,440,464	£4,487,775	1,609
Southwark	1/4/15	-	£286,057	Not published	1,858
Lambeth	1/10/14	£54,533	£3,258,552	£7,829,563	1,707
Greenwich	25/3/15	-	£20,255	£1,475,668	1,858
Tower Hamlets	1/4/15	-	£6,774,442	£18,338,813	2,578

¹¹ The impact of indexation is discussed in section 6.

¹² Postcode sectors SE3, SE8, SE10 and SE16

¹³ Postcode sectors BR1, BR3, SE4, SE9, SE12, SE13, SE14, SE15, SE23 and SE26

¹⁴ London Plan Annual Monitoring Report 2015/16 (July 2017). Lewisham's Annual Monitoring Report indicates that 1,668 additional dwellings were completed in 2016/17. None of the other boroughs had published their figures at the time of drafting this report.

2.41 Lambeth adopted its CIL 6 months prior to Lewisham's adoption date. Lewisham outperformed Lambeth's CIL income over the first six months on an annualised basis and also outperformed Lambeth against its first full year of CIL being in force. Projections made for the five year housing land supply in Lewisham shows a continued strong delivery of housing, with the expectation that similar or greater CIL amounts will be collected over this period.

Local Policy context

2.42 There are numerous policy requirements that are now embedded in base build costs for schemes in London addressing London Plan requirements, which are mirrored in borough Local Plans (i.e. secure by design, lifetime homes, landscaping, amenity space, internal space standards, car parking, waste storage, tree preservation and protection etc). Therefore it is unnecessary to establish the cost of all these pre-existing policy requirements. Appendix 1 summarises the Council's analysis of the potential impacts of the current Local Plan policies which must be reflected in viability testing undertaken to test the impact of alternative CIL rates.

2.43 In order to assess the ability of schemes to absorb higher CIL rates than those in the adopted Charing Schedule, it is also necessary to factor in the pre-existing requirements in the adopted policies. The affordable housing policy is tested at various percentages, as it has a significant bearing on the viability of developments, even though it has been in place for a considerable period.

2.44 We set out a summary of the policies identified as having cost implications for developments below:

- Core Strategy Policy 1 requires 50% affordable housing from all sources with a tenure mix of 70% London Affordable Rent and 30% intermediate (London Living Rent or shared ownership). 42% of affordable housing units are to be provided as 3 bed units.
- Policy 4 requires that in mixed use locations, 20% of floorspace is provided as B use class floorspace.
- Policy 7 reflects the requirements of London Housing SPG standard 35 which requires zero carbon homes.
- Policy 8 sets out a requirement for new homes to meet Code for Sustainable Homes, but this standard has now been removed. For commercial floorspace, Policy 8 requires that commercial floorspace meets BREEAM excellent standard.
- Policy 12 will require that some sites provide open space and children's playspace which would be secured through planning obligations.
- Policy 21 identifies the basis for seeking planning obligations. These requirements will be subject to pooling restrictions in most cases.
- DM policy 8 requires that student housing provides an affordable housing component in line with the Mayor of London's requirement on affordability for students (this equates to a rent of circa £155 per week).

Development context

2.45 Lewisham is an inner-London borough located in south-east London. The borough is bordered by the River Thames and Tower Hamlets to the north, the Royal Borough of Greenwich to the east; the London Borough of Southwark to the west; and the London Borough of Bromley to the south. The borough has numerous transport routes, including mainline trains from central London (London Bridge, Cannon Street and Charing Cross) providing north-south services to the west of the borough (serving New Cross Gate, Brockley, Honor Oak Park, Forest Hill and Sydenham); in the centre of the borough (serving Deptford, St John's, Lewisham, Ladywell, Catford, Bellingham and Beckenham Hill); and to the east (serving Blackheath, Hither Green, Lee and Grove Park). Public Transport Accessibility Levels ('PTAL') are highest in New Cross, Lewisham and Catford, where PTALs reach level 6A/6B, meaning excellent, but are as low as 1 (meaning the lowest levels of accessibility) in the

south, the latter being commensurate with the more suburban makeup of this part of the borough.

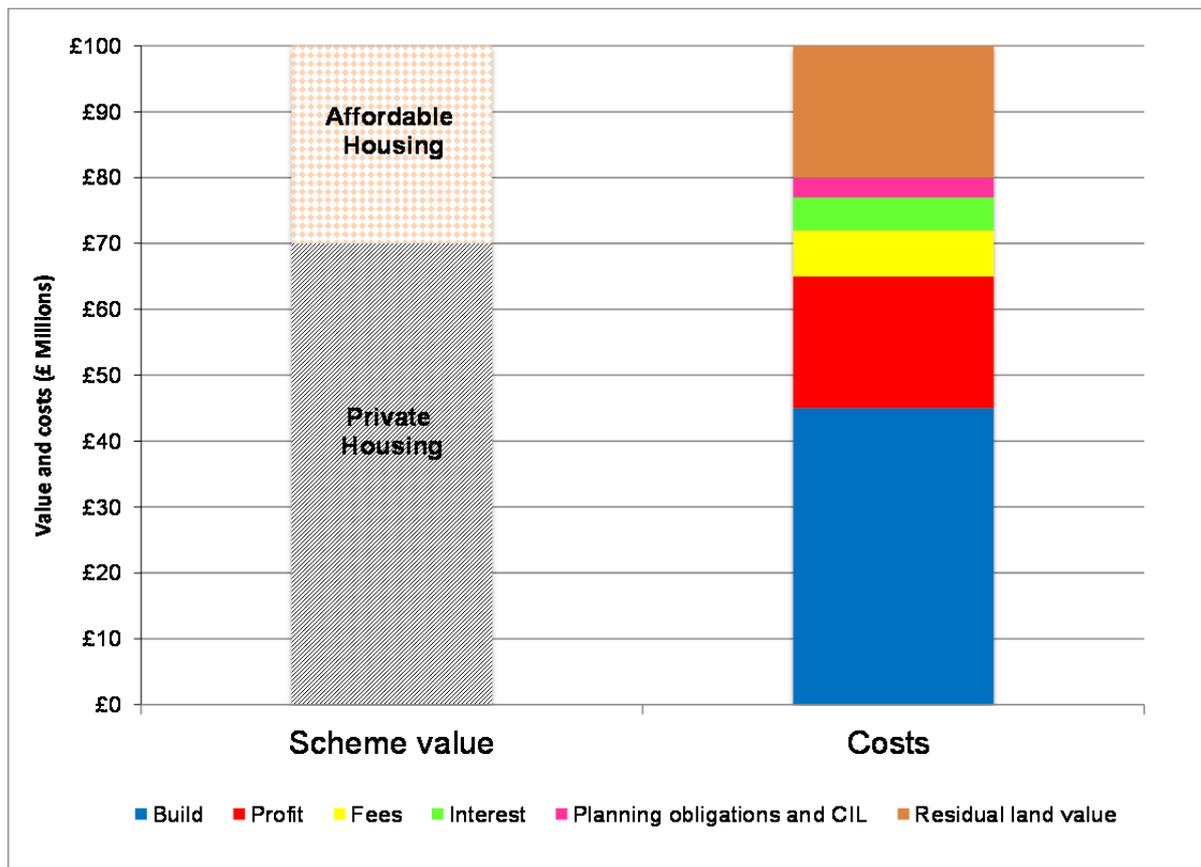
- 2.46 Transport for London ('TfL') recently consulted on a potential extension to the Bakerloo Line, which currently starts at Harrow and Wealdstone Station and terminates at Elephant and Castle. TfL's current preferred option is for the line to be extended to Lewisham with stations at Old Kent Road, New Cross Gate and Lewisham. If the decision is made to proceed with the extension, construction could commence in 2023 with services running by around 2028/29. There are clearly precedents for extensions in growth areas, such as the Northern Line Extension ('NLE') to Battersea Power Station, which is facilitating high density development in the Nine Elms Vauxhall Opportunity Area ('NEVOA'). Developers in the NEVOA are making substantial contributions to the NLE and TfL has secured funding against future incremental business rates arising from the growth in employment floorspace in the area. London Borough of Southwark, which accommodates the Old Kent Road Opportunity Area has recently adopted amendments to its CIL Charging Schedule to secure increased contributions from developments in this area towards the cost of the BLE.
- 2.47 The London Plan designates Lewisham, Deptford Creekside, Catford and New Cross as opportunity areas with potential for significant housing provision and new employment. In addition, the borough accommodates two Housing Zones, one at Catford (2,372 new homes over 33 hectares) and New Bermondsey (2,372 new homes over 12 hectares).
- 2.48 Developments in Lewisham range from small in-fill sites to major regeneration schemes. The bulk of development (in terms of volume of units) is expected to come forward on sites in Town Centres and highly accessible locations such as New Cross, Deptford, Lewisham and Catford.
- 2.49 The Borough has significant opportunities for development through the recycling of previously developed sites, including vacant and under-utilised buildings, commercial buildings, car parks and surplus public sector land.

3 Methodology and appraisal approach

- 3.1 Our methodology follows standard development appraisal conventions, using locally-based sites and assumptions that reflect local market and planning policy circumstances. The study is therefore specific to Lewisham and reflects the Council's existing planning policy requirements.

Approach to testing development viability

- 3.2 Appraisal models can be summarised via the following diagram. The total scheme value is calculated, as represented by the left hand bar. This includes the sales receipts from the private housing (the hatched portion) and the payment from a Registered Provider ('RP') (the chequered portion) for the completed affordable housing units. For a commercial scheme, scheme value equates to the capital value of the rental income after allowing for rent free periods and purchaser's costs. The model then deducts the build costs, fees, interest, planning obligations, CIL and developer's profit. A 'residual' amount is left after all these costs are deducted – this is the land value that the Developer would pay to the landowner. The residual land value is represented by the brown portion of the right hand bar in the diagram.



- 3.3 The Residual Land Value is normally a key variable in determining whether a scheme will proceed. If a proposal generates sufficient positive land value (in excess of existing use value, discussed later), it will be implemented. If not, the proposal will not go ahead, unless there are alternative funding sources to bridge the 'gap'.
- 3.4 Issues with establishing key appraisal variables are summarised as follows:
- Development costs are subject to national and local monitoring and can be reasonably accurately assessed in 'normal' circumstances. In Boroughs like Lewisham, many sites will be

previously developed. These sites can sometimes encounter 'exceptional' costs such as decontamination. Such costs can be very difficult to anticipate before detailed site surveys are undertaken;

- Assumptions about development phasing, phasing of Section 106 contributions and infrastructure required to facilitate each phase of the development will affect residual values. Where the delivery of the obligations are deferred, the less the real cost to the applicant (and the greater the scope for increased affordable housing and other planning obligations). This is because the interest cost is reduced if the costs are incurred later in the development cashflow; and
 - While Developer's Profit has to be assumed in any appraisal, its level is closely correlated with risk. The greater the risk, the higher the profit level required by lenders. While profit levels were typically up to around 15% of completed development value at the peak of the market in 2007, banks currently require schemes to show a higher profit to reflect the current risk. Typically developers and banks are targeting around 17-20% profit on value of the private housing element.
- 3.5 Ultimately, the landowner will make a decision on implementing a project on the basis of return and the potential for market change, and whether alternative developments might yield a higher value. The landowner's 'bottom line' will be achieving a residual land value that sufficiently exceeds 'existing use value'¹⁵ or another appropriate benchmark to make development worthwhile. The margin above existing use value may be considerably different on individual sites, where there might be particular reasons why the premium to the landowner should be lower or higher than other sites.
- 3.6 Clearly, however, landowners have expectations of the value of their land which often exceed the value of the current use. Ultimately, if landowners' reasonable expectations are not met, they will not voluntarily sell their land and (unless a Local Authority is prepared to use its compulsory purchase powers) some may simply hold on to their sites, in the hope that policy may change at some future point with reduced requirements. However, the communities in which development takes place also have reasonable expectations that development will mitigate its impact, in terms of provision of community infrastructure, which will reduce land values. It is within the scope of those expectations that developers have to formulate their offers for sites. The task of formulating an offer for a site is complicated further still during buoyant land markets, where developers have to compete with other developers to secure a site, often speculating on increases in value.

Viability benchmark

- 3.7 The NPPF is not prescriptive on the type of methodology local planning authorities should use when assessing viability. The National Planning Practice Guidance indicates that the NPPF requirement for a 'competitive return' to the landowner will need to allow for an incentive for the land owner to sell and options may include "*the current use value of the land or its value for a realistic alternative use that complies with planning policy*" (paragraph 024; reference ID 10-024-20140306). In March 2018, the government published a draft revised NPPF, which indicates at paragraph 34 that "*Plans should set out the contributions expected in association with particular sites and types of development. This should include setting out the levels and types of affordable housing provision required, along with other infrastructure (such as that needed for education, health, transport, green and digital infrastructure). Such policies should not make development unviable, and should be supported by evidence to demonstrate this*". The draft PPG indicates that for the purposes of testing viability, local authorities should have regard to existing use value of land plus a premium to incentivise release for redevelopment.
- 3.8 The Mayor's Affordable Housing and Viability SPG focuses on decision making in development management, rather than plan making, but indicates that benchmark land values should be based on existing use value plus a premium which should be "*fully justified based on the income generating capacity of the existing use with reference to comparable evidence on rents, which excludes hope value associated with development on the site or alternative uses*".

¹⁵ For the purposes of this report, existing use value is defined as the value of the site in its existing use, assuming that it remains in that use. We are not referring to the RICS Valuation Standards definition of 'Existing Use Value'.

- 3.9 The Local Housing Delivery Group published guidance¹⁶ in June 2012 which provides guidance on testing viability of Local Plan policies. The guidance notes that “*consideration of an appropriate Threshold Land Value [or viability benchmark] needs to take account of the fact that future plan policy requirements will have an impact on land values and landowner expectations. Therefore, using a market value approach as the starting point carries the risk of building-in assumptions of current policy costs rather than helping to inform the potential for future policy*”.
- 3.10 In light of the weaknesses in the market value approach, the Local Housing Delivery Group guidance recommends that benchmark land value “*is based on a premium over current use values*” with the “*precise figure that should be used as an appropriate premium above current use value [being] determined locally*”. The guidance considers that this approach “*is in line with reference in the NPPF to take account of a “competitive return” to a willing land owner*”.
- 3.11 The examination on the Mayor of London’s first CIL charging schedule considered the issue of an appropriate land value benchmark. The Mayor had adopted existing use value, while certain objectors suggested that ‘Market Value’ was a more appropriate benchmark. The Examiner concluded that:
- “The market value approach.... while offering certainty on the price paid for a development site, suffers from being based on prices agreed in an historic policy context.” (paragraph 8) and that “I don’t believe that the EUV approach can be accurately described as fundamentally flawed or that this examination should be adjourned to allow work based on the market approach to be done” (paragraph 9).*
- 3.12 In his concluding remark, the Examiner points out that
- “the price paid for development land may be reduced [so that CIL may be accommodated]. As with profit levels there may be cries that this is unrealistic, but **a reduction in development land value is an inherent part of the CIL concept**. It may be argued that such a reduction may be all very well in the medium to long term but it is impossible in the short term because of the price already paid/agreed for development land. The difficulty with that argument is that if accepted the prospect of raising funds for infrastructure would be forever receding into the future. In any event in some instances it may be possible for contracts and options to be re-negotiated in the light of the changed circumstances arising from the imposition of CIL charges. (paragraph 32 – emphasis added).*
- 3.13 It is important to stress, therefore, that there is no single threshold land value at which land will come forward for development. The decision to bring land forward will depend on the type of owner and, in particular, whether the owner occupies the site or holds it as an asset; the strength of demand for the site’s current use in comparison to others; how offers received compare to the owner’s perception of the value of the site, which in turn is influenced by prices achieved by other sites. Given the lack of a single threshold land value, it is difficult for policy makers to determine the minimum land value that sites should achieve. This will ultimately be a matter of judgement for each planning authority.
- 3.14 Respondents to consultations on planning policy documents in other authorities in London have made various references to the RICS Guidance on ‘Viability in Planning’ and have suggested that councils should run their analysis on market values. This would be an extremely misleading measure against which to test viability, as market values should reflect *existing policies already in place*, and would consequently tell us nothing as to how future (as yet un-adopted) policies might impact on viability. It has been widely accepted elsewhere that market values are inappropriate for testing planning policy requirements.
- 3.15 Relying upon historic transactions is a fundamentally flawed approach, as offers for these sites will have been framed in the context of current planning policy requirements, so an exercise using these transactions as a benchmark would tell the Council nothing about the potential for sites to absorb as yet unadopted policies. Various Local Plan inspectors and CIL examiners have accepted the key point that Local Plan policies and CIL will ultimately result in a reduction in land values, so

¹⁶ Viability Testing Local Plans: Advice for planning practitioners, Local Housing Delivery Group, Chaired by Sir John Harman, June 2012

benchmarks must consider a reasonable minimum threshold which landowners will accept. For local authority areas such as Lewisham, where the vast majority of sites are previously developed, the 'bottom line' in terms of land value will be the value of the site in its existing use. This fundamental point is recognised by the RICS at paragraph 3.4.4. of their Guidance Note on 'Financial Viability in Planning':

"For a development to be financially viable, any uplift from current use value to residual land value that arises when planning permission is granted should be able to meet the cost of planning obligations while ensuring an appropriate Site Value for the landowner and a market risk adjusted return to the developer in delivering that project (the NPPF refers to this as 'competitive returns' respectively). The return to the landowner will be in the form of a land value in excess of current use value".

- 3.16 The Guidance goes on to state that *"it would be inappropriate to assume an uplift based on set percentages ... given the diversity of individual development sites"*.
- 3.17 Commentators also make reference to 'market testing' of benchmark land values. This is another variant of the benchmarking advocated by respondents outlined at paragraph 3.13. These respondents advocate using benchmarks that are based on the prices that sites have been bought and sold for. There are significant weaknesses in this approach which none of the respondents who advocate this have addressed. In brief, prices paid for sites are a highly unreliable indicator of their actual value, due to the following reasons:
- Transactions are often based on bids that 'take a view' on squeezing planning policy requirements below target levels. This results in prices paid being too high to allow for policy targets to be met. If these transactions are used to 'market test' CIL rates, the outcome would be unreliable and potentially highly misleading.
 - Historic transactions of housing sites are often based on the receipt of grant funding, which is no longer available in most cases.
 - There would be a need to determine whether the developer who built out the comparator sites actually achieved a profit at the equivalent level to the profit adopted in the viability testing. If the developer achieved a sub-optimal level of profit, then any benchmarking using these transactions would produce unreliable and misleading results.
 - Developers often build assumptions of growth in sales values into their appraisals, which provides a higher gross development value than would actually be achieved today. Given that our appraisals are based on current values, using prices paid would result in an inconsistent comparison (i.e. current values against the developer's assumed future values). Using these transactions would produce unreliable and misleading results.
- 3.18 These issues are evident from a recent BNP Paribas Real Estate review of evidence submitted in viability assessments where the differences between the value ascribed to developments by applicants and the amounts the sites were purchased for by the same parties. The prices paid exceeded the value of the consented schemes by between 52% and 1,300%.
- 3.19 For the reasons set out above, the approach of using current use values is a more reliable indicator of viability than using market values or prices paid for sites, as advocated by certain observers. Our assessment follows this approach, as set out in Section 4.

4 Appraisal assumptions

- 4.1 We have appraised 22 development typologies on sites across the borough to represent the types of sites that the Council expects to come forward over the plan period. In addition, we have appraised 7 specific sites that are important for the delivery of the Council's targets. The development typologies are identified in Table 4.1.1 overleaf. Floor areas for commercial uses are gross internal areas and are indicative estimates only without the benefit of detailed design. The appraisals include sufficient gross internal floorspace to accommodate the mix identified in Policy 1.

Residential sales values

- 4.2 Residential values in the area reflect national trends in recent years but do of course vary between different sub-markets, as noted in Section 2. We have considered comparable evidence of new build schemes in the borough to establish appropriate values for each scheme for testing purposes. This exercise indicates that the developments in the sample will attract average sales values ranging from circa £7,000 per square metre (£650 per square foot) to £8,290 per square metre (£770 per square foot), as shown in Figure 2.14.1. As noted in Section 2, the highest sales values are achieved in the area adjacent to the Thames, Deptford and Creekside. Developments in parts of the south of the borough are lowest, but there are fewer sites available in this area than in other parts of the borough.
- 4.3 As noted earlier in the report, Savills predict that sales values will increase over the medium term (i.e. the next five years). Whilst this predicted growth cannot be guaranteed, we have run a series of sensitivity analyses assuming growth in sales values accompanied by cost inflation as summarised in Table 4.3.1. While these growth scenarios are based on a number of forecasts, they cannot be guaranteed and the results which these scenarios produce must be viewed as indicative only. We have also increased the benchmark land values in the growth scenarios by 20%, reflecting some improvement in the value of secondary assets.

Table 4.3.1: Growth scenario

Year	1 2017	2 2018	3 2019	4 2020	5 2021	6 2022 and each year thereafter
Values	1%	3%	4%	4%	4.5%	4%
Costs	2.0%	2.0%	2.5%	2.5%	2.5%	2.5%

Affordable housing tenure and values

- 4.4 Policy 1 sets out a 50% strategic target for affordable housing from all sources with a tenure mix of 70% London Affordable Rent and 30% intermediate (London Living Rent or shared ownership).
- 4.5 Our appraisals assume that the rented housing is let at rents that do not exceed London Affordable Rents, as shown in Table 4.5.1. These rents are broadly equivalent to social/target rents.
- 4.6 We have tested the impact of the provision of a proportion of private units as rented by discounting the market value for these units by 20%, which reflects the discount we have seen on live developments when units are provided as Private Rented Sector stock. As noted in Section 2, this discount is offset to a degree by a reduction in profit margin of circa 5%, so the net reduction in value is 15%.

Table 4.1.1: Development typologies tested in the study (all areas are square metre gross internal areas)

Site	Description	Site area HA	Sqm	Site cover	Units	Ave GIA sqm per unit	Residential floorspace	A use	B1	B2	B8	C1 Hotel	C2	D1	D2	Gross floorspace	No of floors
1	Very small residential	0.03	300	50%	1	108	108	0	0	0	0	0	0	0	0	108	2
2	Small residential developments (backland, infill etc)	0.05	500	60%	5	77	383	0	0	0	0	0	0	0	0	383	3
3	Small residential developments (backland, infill etc)	0.10	1,000	60%	11	79	873	0	0	0	0	0	0	0	0	873	6
4	Small residential developments	0.15	1,500	60%	25	79	1,978	0	0	0	0	0	0	0	0	1,978	6
5	Residential development	0.25	2,500	70%	50	83	4,170	0	0	0	0	0	0	0	0	4,170	6
6	Small scale mixed use, local centres	0.02	200	80%	5	77	383	50	0	0	0	0	0	0	0	433	3
7	Small scale mixed use, local centres	0.02	200	80%	5	77	383	0	50	0	0	0	0	0	0	433	3
8	Small mixed use	0.15	1,500	80%	25	79	1,978	200	0	0	0	0	0	0	0	2,178	6
9	Small mixed use	0.20	2,000	80%	30	82	2,468	0	300	0	0	0	0	0	0	2,768	6
10	Mixed use	0.30	3,000	80%	70	84	5,873	100	700	0	0	0	0	0	0	6,673	10
11	Mixed use	0.70	7,000	80%	150	80	11,930	100	700	0	0	0	0	200	0	12,930	14
12	Large mixed use (employment led)	0.80	8,000	80%	300	80	23,865	300	4,500	0	0	0	0	200	0	28,865	16
13	Town Centre	0.30	3,000	90%	200	80	15,910	200	500	0	0	0	0	0	100	16,710	20
14	Town Centre	1.00	10,000	90%	500	80	39,775	1,000	2,500	0	0	0	0	250	250	43,775	30
15	Town Centre	1.00	10,000	90%	250	79	19,865	500	500	0	0	0	0	500	0	21,365	10

Site	Description	Site area HA	Sqm	Site cover	Units	Ave GIA sqm per unit	Residential floorspace	A use	B1	B2	B8	C1 Hotel	C2	D1	D2	Gross floorspace	No of floors
16	Estate regeneration (small)	0.20	2,000	80%	10	79	785	0	0	0	0	0	0	0	0	785	3
17	Estate regeneration (large)	4.00	40,000	80%	200	80	15,910	100	0	0	0	0	0	250	0	16,260	13
18	Student housing	0.30	3,000	90%	-	25	-	150	400	0	0	0	3,000	0	0	3,550	5
19	Hotels	0.20	2,000	90%	67	30	2,000	250	0	0	0	2,000	0	0	0	4,250	6
20	Commercial	0.60	6,000	90%	0	0	-	0	500	0	0	0	0	0	0	500	3
21	Storage	0.20	2,000	80%	0	0	-	0	1,000	0	1,500	0	0	0	0	2,500	2
22	Residential care home (7 units)	0.03	300	80%	7	0	-	0	0	0	0	0	250	0	0	250	3
23	Strategic Site 1	0.77	7,700	80%	230	80	18,315	200	1,600	0	0	0	0	200	0	20,315	16
24	Strategic Site 2	0.85	8,500	80%	250	79	19,865	300	3,000	0	400	0	0	300	0	23,865	16
25	Strategic Site 3	1.68	16,800	80%	370	80	29,415	6,700	0	0	0	0	0	300	1,650	38,065	11
26	Strategic Site 4	0.28	2,800	80%	242	80	19,250	500	200	0	0	0	0	200	0	20,150	30
27	Strategic Site 5	1.14	11,400	80%	540	80	42,965	3,000	500	0	0	0	0	250	250	46,965	30
28	Strategic Site 6	0.30	3,000	70%	180	80	14,315	250	0	0	0	0	0	0	0	14,565	30
29	Strategic Site 7	0.60	6,000	70%	180	80	14,315	0	250	0	0	0	0	0	0	14,565	15

Table 4.5.1: Affordable housing rents (per week)

Rent type	1 bed	2 bed	3 bed	4 bed
London Affordable Rent	£144.26	£152.73	£161.22	£169.70

- 4.8 In the July 2015 Budget, the Chancellor announced that Registered Providers ('RPs') will be required to reduce rents by 1% per annum for the next four years. This will reduce the capital values that RPs will pay developers for completed affordable housing units. From 2019/20 onwards, RPs will be permitted to increase rents by CPI plus 1% per annum. Given that rents will be increasing by CPI plus 1% by the time the new Charging Schedule will be in place, we have applied this assumption to our appraisals.
- 4.9 Based on the rents above, our modelling indicates that RPs would pay an average of £1,749 per square metre (£162 per square foot) to acquire completed Affordable Rented units.
- 4.10 The CLG/HCA 'Shared Ownership and Affordable Homes Programme 2016-2021: Prospectus' document clearly states that Registered Providers will not receive grant funding for any affordable housing provided through planning obligations on developer-led developments. Consequently, all our appraisals assume nil grant. Clearly if grant funding does become available over the plan period, it should facilitate an increase in the provision of affordable housing when developments come forward.
- 4.11 For shared ownership units, we have assumed that Registered Providers will sell 25% initial equity stakes and charge 2.5% on the retained equity. The rent on retained equity is capitalised using a yield of 5%.

Rents and yields for commercial development

- 4.12 Our assumptions on rents and yields for the retail, office and industrial floorspace are summarised in Table 4.12.1. These assumptions are informed by lettings of similar floorspace in the area over the past year. Our appraisals assume a 12 month rent-free period for both retail and office floorspace.

Table 4.12.1: Commercial rents (£s per square metre) and yields

Commercial floorspace	Rent per square metre	Investment yield	Rent free period (months)
Retail	North: £325	5.00%	12
	Mid-borough-: £325	5.00%	12
	South: £325	5.00%	12
Office	North: £375	6.00%	12
	Mid-borough-: £375	6.00%	12
	South: £375	6.00%	12
Industrial and warehousing	North: £160	6.00%	12
	Mid-borough-: £160	6.00%	12
	South: £160	6.00%	12
Hotel	North: £425	5.00%	12
	Mid-borough-: £425	5.00%	12
	South: £425	5.00%	12

Build costs

- 4.13 We have sourced build costs from the RICS Building Cost Information Service (BCIS), which is based on tenders for actual schemes. Base costs (adjusted for local circumstances by reference to BICS multiplier) are as follows:

- Flats (3 – 5 storeys): £1,782 per square metre;
 - Flats (6+ storeys): £2,263 per square metre;
 - Retail: £1,553 per square metre;
 - Offices: £2,081 per square metre;
 - B2 Industrial: £1,204 per square metre;
 - Warehouse/storage: £1,140 per square metre;
 - Student housing: £2,344 per square metre;
 - Hotel: £2,344 per square metre
 - D1/D2 Education, health, leisure etc: £2,617 per square metre.
- 4.14 In addition, the base costs above are increased by 15% to account for external works (including car parking spaces) and 6% for the costs of meeting the energy requirements now embedded into Part L of the Building Regulations.

Zero carbon and BREEAM

- 4.15 The 'Greater London Authority Housing Standards Review: Viability Assessment' estimates that the cost of achieving zero carbon standards is 1.4% of base build costs. We have applied this uplift in costs to the base build costs outlined above.
- 4.16 For commercial developments, we have increased base build costs by 2% to allow for the extra-over costs of achieving BREEAM 'excellent' standard¹⁷. This is assumed to also address the 'excellent;' standard in relation to water efficiency, for which no clear data is available.

Accessibility standards

- 4.17 Our appraisals assume that all units are constructed to meet wheelchair accessibility standards (Category 2) apply to all dwellings at an average cost of £521 per house and £924 per unit for flats. In addition, we have assumed that Category 3 standard applies to 10% of dwellings at a cost of £22,694 per house and £7,908 per flat¹⁸. These costs address both parts A and B of the requirements (i.e. that the communal areas are designed and fitted out to allow wheelchair access and also that the dwellings themselves are designed and fitted out to facilitate occupation by wheelchair users).

Professional fees

- 4.18 In addition to base build costs, schemes will incur professional fees, covering design and valuation, highways consultants and so on. Our appraisals incorporate a 10% allowance, which is at the middle to higher end of the range for most schemes.

Development finance

- 4.19 Our appraisals assume that development finance can be secured at a rate of 6%, inclusive of arrangement and exit fees, reflective of current funding conditions.

Marketing costs

- 4.20 Our appraisals incorporate an allowance of 3% for marketing costs, which includes show homes and agents' fees, plus 0.5% for sales legal fees.

¹⁷ Based on 'Delivering Sustainable Buildings: savings and payback', BREEAM and Sweett Group Research 2014, which identified an increase of between 0.87% to 1.71% of build costs

¹⁸ Based on DCLH 'Housing Standards Review: Cost Impacts' September 2014

Mayoral CIL

- 4.21 Mayoral CIL is payable on most developments that receive planning consent from 1 April 2012 onwards. Lewisham falls within Zone 3, where a CIL of £35 per square metre is levied. The Mayoral CIL takes precedence over Borough requirements, including affordable housing. Our appraisals take into account Mayoral CIL.
- 4.22 The Mayor has recently issued a consultation on amendments to the CIL which will (if adopted) increase the rate in Lewisham to £60 per square metre. We have applied this increased rate in our appraisals¹⁹.

Lewisham CIL

- 4.23 As previously noted, the Council approved its CIL Charging Schedule on 25 February 2015 and it came into effect on 1 April 2015. Table 4.23.1 below summarises the prevailing rates of CIL and the rates after indexation²⁰. For residential developments, the borough is divided into two zones; for developments in the north of the borough (New Cross Gate, Deptford and Lewisham), the adopted rate is £100 per square metre; in all other parts of the borough, the rate for residential developments is £70 per square metre. B use classes attract a nil rate, while all other uses attract a charge of £80 per square metre.

Table 4.23.1: CIL rates per net additional square metre in the Charging Schedule

Development type	Zone	Adopted rate	Indexed rate
Residential C3 use class	Zone 1 ²¹	£100	£112
	Zone 2 ²²	£70	£79
B use classes	Whole borough	£0	£0
All other uses	Whole Borough	£80	£90

- 4.24 The amended CIL Regulations specify that if any part of an existing building is in lawful use for 6 months within the 36 months prior to the time at which planning permission first permits development, all of the existing floorspace will be deducted when determining the amount of chargeable floorspace. This is likely to be the case for many development sites in Lewisham but not all existing floorspace will qualify. Therefore, for the purposes of our appraisals, we have assumed that there is no deduction for existing floorspace to ensure that the proposed CIL rate is viable for developments where there is no qualifying existing floorspace to net off.

Section 106 costs

- 4.25 To account for residual Section 106 requirements, we have included an allowance of up to £20 per square metre for non-residential development and up to £1,500 per unit for residential development (the precise amount varies between the typologies, as shown at Appendix 1). The actual amounts will of course be subject to site-specific negotiations when schemes are brought forward through the development management process.

Development and sales periods

- 4.26 Development and sales periods vary between type of scheme. However, our sales periods are based on an assumption of a sales rate of 6 units per month, with an element of off-plan sales reflected in the timing of receipts. This is reflective of current market conditions, whereas in

¹⁹ The current Mayoral CIL Charging Schedule rate of £20 after indexation has is currently £25.83 per square metre.

²⁰ As per the CIL regulations, indexation applies to rates from the point of introduction to the current date by reference to the BCIS All-In Tender Price Index. April 2015: 283; February 2018: 318. Change is 12.37%. The indexed rates are used in the appraisals.

²¹ Postcode sectors SE3, SE8, SE10 and SE16

²² Postcode sectors BR1, BR3, SE4, SE9, SE12, SE13, SE14, SE15, SE23 and SE26

improved markets, a sales rate of up to 8 units per month might be expected. We also note that many schemes in London have sold entirely off-plan, in some cases well in advance of completion of construction. Clearly markets are cyclical and sales periods will vary over the economic cycle and the extent to which units are sold off-plan will vary over time. Our programme assumptions assume that units are sold over varying periods after completion, which is a conservative approach that ensures that the proposed CIL rates are viable for most developments.

Developer's profit

- 4.27 Developer's profit is closely correlated with the perceived risk of residential development. The greater the risk, the greater the required profit level, which helps to mitigate against the risk, but also to ensure that the potential rewards are sufficiently attractive for a bank and other equity providers to fund a scheme. In 2007, profit levels were at around 13-15% of GDV. However, following the impact of the credit crunch and the collapse in interbank lending and the various government bailouts of the banking sector, profit margins have increased. It is important to emphasise that the level of minimum profit is not necessarily determined by developers (although they will have their own view and the Boards of the major housebuilders will set targets for minimum profit).
- 4.28 The views of the banks which fund development are more important; if the banks decline an application by a developer to borrow to fund a development, it is very unlikely to proceed, as developers rarely carry sufficient cash to fund it themselves. Consequently, future movements in profit levels will largely be determined by the attitudes of the banks towards development proposals.
- 4.29 The near collapse of the global banking system in the final quarter of 2008 is resulting in a much tighter regulatory system, with UK banks having to take a much more cautious approach to all lending. In this context, and against the backdrop of the current sovereign debt crisis in the Eurozone, the banks were for a time reluctant to allow profit levels to decrease. However, perceived risk in the UK housing market is receding, albeit there is a degree of caution in prime central London markets as a consequence of the outcome of the referendum on the UK's membership of the EU. We have therefore adopted a profit margin of 18% of private GDV for testing purposes, although individual schemes may require lower or higher profits, depending on site specific circumstances. The assumed profit margin is reflective of the range of sales values in the borough, which are affordable to owner-occupiers and therefore less vulnerable to changing levels of demand from international investors. Furthermore, there has been less development in the borough in comparison to other boroughs and subsequently lower levels of supply and less sales risk.
- 4.30 Our assumed return on the affordable housing GDV is 6%. A lower return on the affordable housing is appropriate as there is very limited sales risk on these units for the developer; there is often a pre-sale of the units to an RP prior to commencement. Any risk associated with take up of intermediate housing is borne by the acquiring RP, not by the developer. A reduced profit level on the affordable housing reflects the GLA 'Development Control Toolkit' guidance (February 2014) and Homes and Communities Agency's guidelines in its Development Appraisal Tool (August 2013).

Exceptional costs

- 4.31 Exceptional costs can be an issue for development viability on previously developed land. These costs relate to works that are 'atypical', such as remediation of sites in former industrial use and that are over and above standard build costs. However, in the absence of details site investigations, it is not possible to provide a reliable estimate of what exceptional costs might be. Our analysis therefore excludes exceptional costs, as to apply a blanket allowance would generate misleading results. An 'average' level of costs for abnormal ground conditions and some other 'abnormal' costs is already reflected in BCIS data, as such costs are frequently encountered on sites that form the basis of the BCIS data sample.

Benchmark land value

- 4.32 Benchmark land value, based on the existing use value of sites is a key consideration in the assessment of development economics for testing planning policies and tariffs. Clearly, there is a point where the Residual Land Value (what the landowner receives from a developer) that results

from a scheme may be less than the land's existing use value. Existing use values can vary significantly, depending on the demand for the type of building relative to other areas. Similarly, subject to planning permission, the potential development site may be capable of being used in different ways – as a hotel rather than residential for example; or at least a different mix of uses. Existing use value is effectively the 'bottom line' in a financial sense and therefore a key factor in this study.

- 4.33 We have arrived at a broad judgement on the likely range of benchmark land values. On previously developed sites, the calculations assume that the landowner has made a judgement that the current use does not yield an optimum use of the site; for example, it has fewer storeys than neighbouring buildings; or there is a general lack of demand for the type of space, resulting in low rentals, high yields and high vacancies (or in some cases no occupation at all over a lengthy period). We would not expect a building which makes optimum use of a site and that is attracting a reasonable rent to come forward for development, as residual value may not exceed current use value in these circumstances.
- 4.34 Redevelopment proposals that generate residual land values below current use values are unlikely to be delivered. While any such thresholds are only a guide in 'normal' development circumstances, it does not imply that individual landowners, in particular financial circumstances, will not bring sites forward at a lower return or indeed require a higher return. If proven current use value justifies a higher benchmark than those assumed, then appropriate adjustments may be necessary. As such, current use values should be regarded as benchmarks rather than definitive fixed variables on a site by site basis.
- 4.35 Sites will be in various existing uses and for the purposes of the study, we have adopted a range of benchmark land values from £2.5 million to £10 million per gross hectare, inclusive of any premium deemed to be required to incentivise release of land for development. This range is informed by our analysis of lettings of industrial floorspace and secondary offices in the borough, as set out below.
- 4.36 Lettings of office space in the borough between March 2015 and March 2018 have achieved rents ranging from £8 per square foot to £41 per square foot, with lettings in the bottom 20% averaging £10 per square foot, which is reflective of the sites likely to come forward for development. We have established the capital value of a site extending to one hectare by adopting the following assumptions:
- 40% site coverage
 - 2 storeys
 - Yield 7.5%
 - 1 years rent free
 - Purchaser's costs deducted at 6.8%.
- 4.37 The capital value assumed is £10 million, including premium.
- 4.38 We have adopted the same approach for industrial buildings. We have applied a rent of £5 per square foot reflecting the lower end of the range of lettings of industrial space between March 2015 and March 2018. We have established the capital value of a site extending to one hectare by adopting the following assumptions:
- 40% site coverage
 - 1 storey
 - Yield 7%
 - 1 year rent free
 - Purchaser's costs deducted at 6.8%.
- 4.39 The capital value assumed is £2.5 million across the borough.
- 4.40 We have tested two intermediate benchmark land values in the range above, at £5 million and £7.5 million per gross hectare.

5 Appraisal outputs

- 5.1 The full inputs to and outputs from our appraisals of the various developments are set out in Section 6 and appendices 2 to 5. We have appraised 22 development typologies, reflecting different densities and types of development across the Borough and 7 specific sites identified by the Council.
- 5.2 Each appraisal incorporates (where relevant) the following levels of affordable housing in line with Policy 11:
- 50% affordable housing;
 - 40% affordable housing;
 - 35% affordable housing;
 - 20% affordable housing;
 - 10% affordable housing; and
 - 100% private housing.
- 5.3 In all cases, the affordable housing is assumed to be provided as 70% social rent and 30% intermediate housing.
- 5.4 For small sites that fall below the 10 unit threshold, we have factored in the affordable housing requirement as on-site units to test their ability to a potential affordable housing requirement as well as CIL. This is provided for information only, as the current Local Plan does not require small schemes to make any contribution towards affordable housing.
- 5.5 For each development typology, we have tested a range of sales values, reflecting the spread identified in the previous section. Where the residual land value of a typology exceeds the benchmark land value, we have converted the surplus into a rate per square metre, which is equivalent to the maximum CIL that could, in theory, be charged for that particular development.
- 5.6 We have also tested the developments with CIL as an inputted amount (rather than an output) with the starting point being the adopted charging schedule rates after indexation. The purpose is to approach the potential CIL rates through the 'other end of the telescope', that is, to test the impact on the residual land value that each scheme generates with the existing CIL rates in place. This can assist the Council in forming a judgement as to the potential impact on changes to CIL rates on land values and, consequently, potential land supply for certain uses. The indexed and alternative rates are summarised in Table 5.6.1.

Table 5.6.1: Alternative CIL rates

Development type	Zone	Adopted rate	Indexed rate	Alternative rate 1	Alternative rate 2	Alternative rate 3
Residential	Zone A	£70	£79	£100	£125	£150
	Zone B	£100	£112	£150	£175	£200
Offices	Whole borough	-	-	£20	£30	£40
Retail	Whole borough	£80	£90	£120	£140	£160
Hotel	Whole borough	£80	£90	£120	£140	£160
Student Housing	Whole Borough	£80	£90	£120	£140	£160
Industrial and warehousing	Whole Borough	-	-	£10	£20	£30
All other uses, incl emergency services buildings	Whole Borough	-	-	-	-	-

- 5.7 Finally, all the scenarios are tested with the growth and inflation rates summarised in Table 4.3.1.

6 Assessment of appraisal results

- 6.1 This section sets out the results of our appraisals with the residual land values calculated for scenarios with sales values and capital values reflective of market conditions across the Borough. The Residual Land Values are assessed in two ways. Firstly, the surplus residual above the benchmark land value is calculated and converted into a rate per square metre, which is a proxy for potential CIL rates. This results in a significant number of results, depending on other factors tested, most notably the level of affordable housing.
- 6.2 Development value is finite and – in densely developed Boroughs such as Lewisham - is rarely enhanced through the adoption of new policy requirements. This is because existing use values are sometimes relatively high prior to development. In contrast, areas which have previously undeveloped land clearly have greater scope to secure an uplift in land value through the planning process.
- 6.3 In assessing the results, it is important to clearly distinguish between two scenarios; namely, schemes that are unviable *regardless of the Council's policy requirements, including the level of CIL* (including a nil rate) and schemes that are viable *prior* to the imposition of policy requirements. If a scheme is unviable before policy requirements and CIL are levied, it is unlikely to come forward and policy requirements and CIL would not be a factor that comes into play in the developer's/landowner's decision making. The unviable schemes will only become viable following an increase in values and sites would remain in their existing use.
- 6.4 The CIL regulations state that in setting a charge, local authorities must “strike an appropriate balance” between revenue maximisation on the one hand and the potentially adverse impact of CIL upon the viability of development across the whole area on the other. When considering this balance, the following factors are important:
- Firstly, councils should take a strategic view of viability. There will always be variations in viability between individual sites, but viability testing should establish the most typical viability position; not the exceptional situations.
 - Secondly, councils should take a balanced view of viability – residual valuations are just one factor influencing a developer's decision making – the same applies to local authorities.
 - Thirdly, while a single charge is attractive, it may not be appropriate for all authorities, particularly in areas where sales values vary between areas.
 - Fourthly, markets are cyclical and subject to change over short periods of time. Sensitivity testing to sensitivity test levels of CIL to ensure they are robust in the event that market conditions improve over the life of a Charging Schedule is essential.
 - Fifthly, local authorities should not set their rates of CIL at the limits of viability. They should leave a margin or contingency to allow for change and site specific viability issues.
- 6.5 There is clearly a balance that has to be struck between the aims of Policy 1 on the delivery of affordable housing (which sets a strategic target of 50%, subject to individual scheme viability) and securing adequate contributions towards infrastructure from the developments that contribute towards the need for new infrastructure. The CIL rate cannot therefore be set on the basis that every single development typology right across the borough will deliver 50%, as this is not always viable. The Council's latest Annual Monitoring Report for the financial year 2016/17 (published December 2017) indicates that there were 327 net new affordable housing completions, which amounts to 20% of all net dwellings that were completed. The Council's affordable housing delivery is subject to a separate report by the Council looking at planning obligations, CIL and Affordable Housing delivery.
- 6.6 We have therefore focused on the results of testing where we have included between 20% and 30% affordable housing, as the Council will need to secure adequate amounts of funding to support new development. Affordable housing cannot be maximised to the total exclusion of securing infrastructure funding and vice versa.
- 6.7 The appraisals generate a very wide spread of potential CIL rates, depending on the benchmark land

value, residential sales values and the mix of uses within each development typology. The results are summarised in tables 6.7.1 to 6.7.8. As one would expect, the capacity for schemes to absorb CIL is greater where the benchmark land value is lowest. Furthermore, it is very clear that the capacity to absorb CIL contributions declines as the percentage of affordable housing increases.

- 6.8 The second approach to testing potential revised CIL rates is to consider viability from the other perspective; rather than the potential CIL rates being determined by the 'surplus' residual land value over the benchmark land value, the second approach inputs CIL as a cost to determine the scale of impact on the residual land value. This approach helps form a judgement on the impact of CIL on land values, which – if sufficiently modest – is unlikely to prevent a scheme from coming forward. These results are summarised in tables 6.8.1 to 6.8.4.
- 6.9 The results of this analysis indicate that increases from the adopted CIL rates would not have a significant impact on the residual land values generated. This is illustrated in figures 6.9.1 to 6.9.5, which set the various residual land values from the four CIL scenarios alongside each other for each development. The charts show very modest movements in residual land values in almost all cases, indicating that increases to the Council's currently adopted CIL rates would not prevent development coming forward.
- 6.10 At any of the alternative CIL rates the burden on development would remain at an acceptably low level in most cases. The change in residual land value resulting from increases in CIL rates would generally be less than 10%. This indicates that developments could absorb the higher rates without any adverse significant impact upon land supply.

Table 6.7.1: Maximum CIL rates (before buffer), using £2.5 million per hectare benchmark land value – Zone A

£7,750 per sqm / £720 per sqft		Affordable housing percentage and maximum CIL rates per sqm								
	Resi units	0%	10%	20%	30%	35%	40%	50%		
1	Very small residential	1	£ 2,176	£ 1,874	£ 1,572	£ 1,270	£ 1,119	£ 969	£ 667	
2	Small residential developments (backland, infill etc)	5	£ 1,643	£ 1,393	£ 1,144	£ 895	£ 770	£ 646	£ 397	
3	Small residential developments (backland, infill etc)	11	£ 1,618	£ 1,374	£ 1,130	£ 886	£ 764	£ 642	£ 398	
4	Small residential developments	25	£ 1,491	£ 1,257	£ 1,023	£ 789	£ 672	£ 555	£ 320	
5	Residential development	50	£ 1,504	£ 1,273	£ 1,042	£ 811	£ 695	£ 580	£ 349	
6	Small scale mixed use, local centres	5	£ 1,803	£ 1,582	£ 1,362	£ 1,142	£ 1,031	£ 921	£ 701	
7	Small scale mixed use, local centres	5	£ 1,725	£ 1,505	£ 1,285	£ 1,064	£ 954	£ 844	£ 623	
8	Small mixed use	25	£ 1,454	£ 1,242	£ 1,029	£ 816	£ 710	£ 604	£ 391	
9	Small mixed use	30	£ 1,364	£ 1,155	£ 946	£ 738	£ 633	£ 529	£ 320	
10	Mixed use	70	£ 815	£ 627	£ 439	£ 250	£ 156	£ 62	£ -	
11	Mixed use	150	£ 739	£ 545	£ 350	£ 155	£ 58	£ -	£ -	
12	Large mixed use (employment led)	300	£ 607	£ 454	£ 301	£ 148	£ 71	£ -	£ -	
13	Tow n Centre	200	£ 688	£ 506	£ 322	£ 138	£ 47	£ -	£ -	
14	Tow n Centre	500	£ 307	£ 162	£ 17	£ -	£ -	£ -	£ -	
15	Tow n Centre	250	£ 626	£ 444	£ 260	£ 77	£ -	£ -	£ -	
16	Estate regeneration (small)	10	£ 1,138	£ 889	£ 640	£ 390	£ 266	£ 141	£ -	
17	Estate regeneration (large)	200	£ -	£ -	£ -	£ -	£ -	£ -	£ -	
18	Student housing	120	£ 551	£ 551	£ 551	£ 551	£ 551	£ 551	£ 551	
19	Hotels	67	£ 1,201	£ 1,092	£ 983	£ 874	£ 819	£ 764	£ 655	
20	Office	-	£ -	£ -	£ -	£ -	£ -	£ -	£ -	
21	Storage	-	£ -	£ -	£ -	£ -	£ -	£ -	£ -	
22	Residential care home (7 units)	7	£ 613	£ 612	£ 611	£ 610	£ 609	£ 609	£ 608	
23	Strategic Site 1	230	£ 773	£ 587	£ 401	£ 213	£ 119	£ 25	£ -	
24	Strategic Site 2	250	£ 678	£ 514	£ 348	£ 182	£ 99	£ 16	£ -	
25	Strategic Site 3	370	£ 652	£ 501	£ 351	£ 200	£ 124	£ 48	£ -	
26	Strategic Site 4	242	£ 596	£ 418	£ 241	£ 63	£ -	£ -	£ -	
27	Strategic Site 5	540	£ 401	£ 253	£ 103	£ -	£ -	£ -	£ -	
28	Strategic Site 6	180	£ 655	£ 464	£ 273	£ 82	£ -	£ -	£ -	
29	Strategic Site 7	181	£ 905	£ 687	£ 468	£ 249	£ 139	£ 29	£ -	

Table 6.7.2: Maximum CIL rates (before buffer), using £2.5 million per hectare benchmark land value – Zone B

		Resi units	Affordable housing percentage and maximum CIL rates per sqm							
			0%	10%	20%	30%	35%	40%	50%	
1	Very small residential	1	£ 1,670	£ 1,419	£ 1,168	£ 916	£ 791	£ 665	£ 414	
2	Small residential developments (backland, infill etc)	5	£ 1,219	£ 1,012	£ 805	£ 598	£ 495	£ 392	£ 185	
3	Small residential developments (backland, infill etc)	11	£ 1,201	£ 998	£ 796	£ 594	£ 493	£ 391	£ 189	
4	Small residential developments	25	£ 1,086	£ 893	£ 699	£ 505	£ 408	£ 312	£ 118	
5	Residential development	50	£ 1,102	£ 911	£ 720	£ 529	£ 434	£ 339	£ 148	
6	Small scale mixed use, local centres	5	£ 1,428	£ 1,245	£ 1,062	£ 879	£ 788	£ 696	£ 513	
7	Small scale mixed use, local centres	5	£ 1,351	£ 1,168	£ 985	£ 802	£ 710	£ 619	£ 436	
8	Small mixed use	25	£ 1,087	£ 911	£ 735	£ 559	£ 471	£ 383	£ 207	
9	Small mixed use	30	£ 1,003	£ 830	£ 657	£ 485	£ 398	£ 312	£ 139	
10	Mixed use	70	£ 485	£ 329	£ 174	£ 19	£ -	£ -	£ -	
11	Mixed use	150	£ 396	£ 235	£ 75	£ -	£ -	£ -	£ -	
12	Large mixed use (employment led)	300	£ 324	£ 198	£ 73	£ -	£ -	£ -	£ -	
13	Tow n Centre	200	£ 358	£ 208	£ 57	£ -	£ -	£ -	£ -	
14	Tow n Centre	500	£ 26	£ -	£ -	£ -	£ -	£ -	£ -	
15	Tow n Centre	250	£ 293	£ 143	£ -	£ -	£ -	£ -	£ -	
16	Estate regeneration (small)	10	£ 714	£ 507	£ 301	£ 94	£ -	£ -	£ -	
17	Estate regeneration (large)	200	£ -	£ -	£ -	£ -	£ -	£ -	£ -	
18	Student housing	120	£ 551	£ 551	£ 551	£ 551	£ 551	£ 551	£ 551	
19	Hotels	67	£ 1,013	£ 923	£ 832	£ 742	£ 697	£ 652	£ 561	
20	Office	-	£ -	£ -	£ -	£ -	£ -	£ -	£ -	
21	Storage	-	£ -	£ -	£ -	£ -	£ -	£ -	£ -	
22	Residential care home (7 units)	7	£ 613	£ 612	£ 611	£ 610	£ 609	£ 609	£ 608	
23	Strategic Site 1	230	£ 443	£ 288	£ 134	£ -	£ -	£ -	£ -	
24	Strategic Site 2	250	£ 382	£ 246	£ 109	£ -	£ -	£ -	£ -	
25	Strategic Site 3	370	£ 380	£ 257	£ 132	£ 8	£ -	£ -	£ -	
26	Strategic Site 4	242	£ 275	£ 129	£ -	£ -	£ -	£ -	£ -	
27	Strategic Site 5	540	£ 119	£ -	£ -	£ -	£ -	£ -	£ -	
28	Strategic Site 6	180	£ 314	£ 157	£ 0	£ -	£ -	£ -	£ -	
29	Strategic Site 7	181								

Table 6.7.3: Maximum CIL rates (before buffer), using £5 million per hectare benchmark land value – Zone A

		Resi units	Affordable housing percentage and maximum CIL rates per sqm							
			0%	10%	20%	30%	35%	40%	50%	
1	Very small residential	1	£ 1,478	£ 1,177	£ 875	£ 573	£ 422	£ 271	£ -	
2	Small residential developments (backland, infill etc)	5	£ 1,316	£ 1,067	£ 817	£ 568	£ 444	£ 319	£ 70	
3	Small residential developments (backland, infill etc)	11	£ 1,332	£ 1,088	£ 843	£ 599	£ 477	£ 355	£ 111	
4	Small residential developments	25	£ 1,302	£ 1,068	£ 833	£ 599	£ 482	£ 365	£ 131	
5	Residential development	50	£ 1,354	£ 1,123	£ 892	£ 661	£ 545	£ 430	£ 199	
6	Small scale mixed use, local centres	5	£ 1,687	£ 1,467	£ 1,246	£ 1,026	£ 916	£ 805	£ 585	
7	Small scale mixed use, local centres	5	£ 1,610	£ 1,389	£ 1,169	£ 949	£ 838	£ 728	£ 508	
8	Small mixed use	25	£ 1,282	£ 1,070	£ 857	£ 644	£ 538	£ 432	£ 219	
9	Small mixed use	30	£ 1,183	£ 975	£ 766	£ 557	£ 453	£ 348	£ 139	
10	Mixed use	70	£ 703	£ 514	£ 326	£ 138	£ 44	£ -	£ -	
11	Mixed use	150	£ 604	£ 409	£ 215	£ 20	£ -	£ -	£ -	
12	Large mixed use (employment led)	300	£ 537	£ 385	£ 232	£ 78	£ 1	£ -	£ -	
13	Tow n Centre	200	£ 644	£ 461	£ 277	£ 94	£ 2	£ -	£ -	
14	Tow n Centre	500	£ 250	£ 105	£ -	£ -	£ -	£ -	£ -	
15	Tow n Centre	250	£ 509	£ 327	£ 143	£ -	£ -	£ -	£ -	
16	Estate regeneration (small)	10	£ 501	£ 252	£ 3	£ -	£ -	£ -	£ -	
17	Estate regeneration (large)	200	£ -	£ -	£ -	£ -	£ -	£ -	£ -	
18	Student housing	120	£ 339	£ 339	£ 339	£ 339	£ 339	£ 339	£ 339	
19	Hotels	67	£ 1,084	£ 975	£ 866	£ 756	£ 702	£ 647	£ 538	
20	Office	-	£ -	£ -	£ -	£ -	£ -	£ -	£ -	
21	Storage	-	£ -	£ -	£ -	£ -	£ -	£ -	£ -	
22	Residential care home (7 units)	7	£ 313	£ 312	£ 311	£ 310	£ 309	£ 309	£ 308	
23	Strategic Site 1	230	£ 679	£ 493	£ 306	£ 118	£ 24	£ -	£ -	
24	Strategic Site 2	250	£ 589	£ 424	£ 259	£ 93	£ 10	£ -	£ -	
25	Strategic Site 3	370	£ 542	£ 391	£ 240	£ 90	£ 14	£ -	£ -	
26	Strategic Site 4	242	£ 562	£ 384	£ 206	£ 28	£ -	£ -	£ -	
27	Strategic Site 5	540	£ 340	£ 192	£ 43	£ -	£ -	£ -	£ -	
28	Strategic Site 6	180	£ 603	£ 412	£ 221	£ 30	£ -	£ -	£ -	
29	Strategic Site 7	181	£ 802	£ 584	£ 366	£ 146	£ 36	£ -	£ -	

Table 6.7.4: Maximum CIL rates (before buffer), using £5 million per hectare benchmark land value – Zone B

		Resi units	Affordable housing percentage and maximum CIL rates per sqm							
			0%	10%	20%	30%	35%	40%	50%	
1	Very small residential	1	£ 973	£ 721	£ 470	£ 219	£ 93	£ -	£ -	
2	Small residential developments (backland, infill etc)	5	£ 892	£ 685	£ 479	£ 272	£ 168	£ 65	£ -	
3	Small residential developments (backland, infill etc)	11	£ 914	£ 712	£ 510	£ 307	£ 206	£ 105	£ -	
4	Small residential developments	25	£ 897	£ 703	£ 509	£ 316	£ 219	£ 122	£ -	
5	Residential development	50	£ 952	£ 761	£ 570	£ 380	£ 284	£ 189	£ -	
6	Small scale mixed use, local centres	5	£ 1,312	£ 1,130	£ 947	£ 764	£ 672	£ 581	£ 398	
7	Small scale mixed use, local centres	5	£ 1,235	£ 1,052	£ 869	£ 686	£ 595	£ 503	£ 320	
8	Small mixed use	25	£ 914	£ 738	£ 563	£ 387	£ 299	£ 211	£ 35	
9	Small mixed use	30	£ 822	£ 649	£ 477	£ 304	£ 218	£ 131	£ -	
10	Mixed use	70	£ 372	£ 217	£ 62	£ -	£ -	£ -	£ -	
11	Mixed use	150	£ 260	£ 100	£ -	£ -	£ -	£ -	£ -	
12	Large mixed use (employment led)	300	£ 254	£ 129	£ 4	£ -	£ -	£ -	£ -	
13	Tow n Centre	200	£ 314	£ 163	£ 12	£ -	£ -	£ -	£ -	
14	Tow n Centre	500	£ -	£ -	£ -	£ -	£ -	£ -	£ -	
15	Tow n Centre	250	£ 176	£ 26	£ -	£ -	£ -	£ -	£ -	
16	Estate regeneration (small)	10	£ 77	£ -	£ -	£ -	£ -	£ -	£ -	
17	Estate regeneration (large)	200	£ -	£ -	£ -	£ -	£ -	£ -	£ -	
18	Student housing	120	£ 339	£ 339	£ 339	£ 339	£ 339	£ 339	£ 339	
19	Hotels	67	£ 896	£ 805	£ 715	£ 624	£ 579	£ 534	£ 444	
20	Office	-	£ -	£ -	£ -	£ -	£ -	£ -	£ -	
21	Storage	-	£ -	£ -	£ -	£ -	£ -	£ -	£ -	
22	Residential care home (7 units)	7	£ 313	£ 312	£ 311	£ 310	£ 309	£ 309	£ 308	
23	Strategic Site 1	230	£ 348	£ 194	£ 39	£ -	£ -	£ -	£ -	
24	Strategic Site 2	250	£ 293	£ 157	£ 20	£ -	£ -	£ -	£ -	
25	Strategic Site 3	370	£ 270	£ 146	£ 22	£ -	£ -	£ -	£ -	
26	Strategic Site 4	242	£ 240	£ 95	£ -	£ -	£ -	£ -	£ -	
27	Strategic Site 5	540	£ 59	£ -	£ -	£ -	£ -	£ -	£ -	
28	Strategic Site 6	180	£ 263	£ 106	£ -	£ -	£ -	£ -	£ -	
29	Strategic Site 7	181	£ 431	£ 249	£ 67	£ -	£ -	£ -	£ -	

Table 6.7.5: Maximum CIL rates (before buffer), using £7.5 million per hectare benchmark land value – Zone A

£7,750 per sqm / £720 per sqft		Affordable housing percentage and maximum CIL rates per sqm							
	Resi units	0%	10%	20%	30%	35%	40%	50%	
1	Very small residential	1	£ 781	£ 479	£ 177	£ -	£ -	£ -	£ -
2	Small residential developments (backland, infill etc)	5	£ 989	£ 740	£ 491	£ 241	£ 117	£ -	£ -
3	Small residential developments (backland, infill etc)	11	£ 1,045	£ 801	£ 557	£ 313	£ 191	£ 69	£ -
4	Small residential developments	25	£ 1,112	£ 878	£ 644	£ 410	£ 292	£ 175	£ -
5	Residential development	50	£ 1,204	£ 973	£ 742	£ 511	£ 396	£ 280	£ 49
6	Small scale mixed use, local centres	5	£ 1,572	£ 1,351	£ 1,131	£ 910	£ 800	£ 690	£ 469
7	Small scale mixed use, local centres	5	£ 1,494	£ 1,274	£ 1,053	£ 833	£ 723	£ 612	£ 392
8	Small mixed use	25	£ 1,110	£ 897	£ 685	£ 472	£ 366	£ 259	£ 47
9	Small mixed use	30	£ 1,003	£ 794	£ 585	£ 376	£ 272	£ 168	£ -
10	Mixed use	70	£ 590	£ 402	£ 214	£ 26	£ -	£ -	£ -
11	Mixed use	150	£ 469	£ 274	£ 79	£ -	£ -	£ -	£ -
12	Large mixed use (employment led)	300	£ 468	£ 316	£ 163	£ 9	£ -	£ -	£ -
13	Tow n Centre	200	£ 599	£ 416	£ 232	£ 49	£ -	£ -	£ -
14	Tow n Centre	500	£ 193	£ 48	£ -	£ -	£ -	£ -	£ -
15	Tow n Centre	250	£ 392	£ 210	£ 26	£ -	£ -	£ -	£ -
16	Estate regeneration (small)	10	£ -	£ -	£ -	£ -	£ -	£ -	£ -
17	Estate regeneration (large)	200	£ -	£ -	£ -	£ -	£ -	£ -	£ -
18	Student housing	120	£ 128	£ 128	£ 128	£ 128	£ 128	£ 128	£ 128
19	Hotels	67	£ 967	£ 857	£ 748	£ 639	£ 584	£ 530	£ 421
20	Office	-	£ -	£ -	£ -	£ -	£ -	£ -	£ -
21	Storage	-	£ -	£ -	£ -	£ -	£ -	£ -	£ -
22	Residential care home (7 units)	7	£ 13	£ 12	£ 11	£ 10	£ 9	£ 9	£ 8
23	Strategic Site 1	230	£ 584	£ 398	£ 211	£ 24	£ -	£ -	£ -
24	Strategic Site 2	250	£ 500	£ 335	£ 170	£ 4	£ -	£ -	£ -
25	Strategic Site 3	370	£ 431	£ 281	£ 130	£ -	£ -	£ -	£ -
26	Strategic Site 4	242	£ 527	£ 349	£ 171	£ -	£ -	£ -	£ -
27	Strategic Site 5	540	£ 280	£ 132	£ -	£ -	£ -	£ -	£ -
28	Strategic Site 6	180	£ 552	£ 361	£ 170	£ -	£ -	£ -	£ -
29	Strategic Site 7	181	£ 699	£ 481	£ 263	£ 43	£ -	£ -	£ -

Table 6.7.6: Maximum CIL rates (before buffer), using £7.5 million per hectare benchmark land value – Zone B

£7,000 per sqm / £650 per sqft		Affordable housing percentage and maximum CIL rates per sqm								
	Resi units	0%	10%	20%	30%	35%	40%	50%		
1	Very small residential	1	£ 275	£ 24	£ -	£ -	£ -	£ -	£ -	£ -
2	Small residential developments (backland, infill etc)	5	£ 565	£ 359	£ 152	£ -	£ -	£ -	£ -	£ -
3	Small residential developments (backland, infill etc)	11	£ 628	£ 425	£ 223	£ 21	£ -	£ -	£ -	£ -
4	Small residential developments	25	£ 707	£ 513	£ 320	£ 126	£ 29	£ -	£ -	£ -
5	Residential development	50	£ 802	£ 611	£ 421	£ 230	£ 134	£ 39	£ -	£ -
6	Small scale mixed use, local centres	5	£ 1,197	£ 1,014	£ 831	£ 648	£ 557	£ 465	£ 282	£ -
7	Small scale mixed use, local centres	5	£ 1,119	£ 937	£ 754	£ 571	£ 479	£ 388	£ 205	£ -
8	Small mixed use	25	£ 742	£ 566	£ 390	£ 215	£ 127	£ 39	£ -	£ -
9	Small mixed use	30	£ 641	£ 469	£ 296	£ 123	£ 37	£ -	£ -	£ -
10	Mixed use	70	£ 260	£ 105	£ -	£ -	£ -	£ -	£ -	£ -
11	Mixed use	150	£ 125	£ -	£ -	£ -	£ -	£ -	£ -	£ -
12	Large mixed use (employment led)	300	£ 185	£ 60	£ -	£ -	£ -	£ -	£ -	£ -
13	Tow n Centre	200	£ 269	£ 118	£ -	£ -	£ -	£ -	£ -	£ -
14	Tow n Centre	500	£ -	£ -	£ -	£ -	£ -	£ -	£ -	£ -
15	Tow n Centre	250	£ 59	£ -	£ -	£ -	£ -	£ -	£ -	£ -
16	Estate regeneration (small)	10	£ -	£ -	£ -	£ -	£ -	£ -	£ -	£ -
17	Estate regeneration (large)	200	£ -	£ -	£ -	£ -	£ -	£ -	£ -	£ -
18	Student housing	120	£ 128	£ 128	£ 128	£ 128	£ 128	£ 128	£ 128	£ 128
19	Hotels	67	£ 778	£ 688	£ 597	£ 507	£ 462	£ 417	£ 326	£ -
20	Office	-	£ -	£ -	£ -	£ -	£ -	£ -	£ -	£ -
21	Storage	-	£ -	£ -	£ -	£ -	£ -	£ -	£ -	£ -
22	Residential care home (7 units)	7	£ 13	£ 12	£ 11	£ 10	£ 9	£ 9	£ 8	£ -
23	Strategic Site 1	230	£ 253	£ 99	£ -	£ -	£ -	£ -	£ -	£ -
24	Strategic Site 2	250	£ 204	£ 67	£ -	£ -	£ -	£ -	£ -	£ -
25	Strategic Site 3	370	£ 159	£ 36	£ -	£ -	£ -	£ -	£ -	£ -
26	Strategic Site 4	242	£ 206	£ 60	£ -	£ -	£ -	£ -	£ -	£ -
27	Strategic Site 5	540	£ -	£ -	£ -	£ -	£ -	£ -	£ -	£ -
28	Strategic Site 6	180	£ 211	£ 54	£ -	£ -	£ -	£ -	£ -	£ -
29	Strategic Site 7	181	£ 328	£ 146	£ -	£ -	£ -	£ -	£ -	£ -

Table 6.7.7: Maximum CIL rates (before buffer), using £10 million per hectare benchmark land value – Zone A

		Resi units	Residential sales values per square metre							
			0%	10%	20%	30%	35%	40%	50%	
1	Very small residential	1	£ 83	£ -	£ -	£ -	£ -	£ -	£ -	£ -
2	Small residential developments (backland, infill etc)	5	£ 662	£ 413	£ 164	£ -	£ -	£ -	£ -	£ -
3	Small residential developments (backland, infill etc)	11	£ 759	£ 515	£ 270	£ 26	£ -	£ -	£ -	£ -
4	Small residential developments	25	£ 922	£ 688	£ 454	£ 220	£ 103	£ -	£ -	£ -
5	Residential development	50	£ 1,054	£ 823	£ 592	£ 361	£ 246	£ 130	£ -	£ -
6	Small scale mixed use, local centres	5	£ 1,456	£ 1,236	£ 1,015	£ 795	£ 684	£ 574	£ 354	£ -
7	Small scale mixed use, local centres	5	£ 1,379	£ 1,158	£ 938	£ 717	£ 607	£ 497	£ 276	£ -
8	Small mixed use	25	£ 938	£ 725	£ 513	£ 300	£ 194	£ 87	£ -	£ -
9	Small mixed use	30	£ 822	£ 613	£ 404	£ 196	£ 91	£ -	£ -	£ -
10	Mixed use	70	£ 478	£ 290	£ 101	£ -	£ -	£ -	£ -	£ -
11	Mixed use	150	£ 333	£ 138	£ -	£ -	£ -	£ -	£ -	£ -
12	Large mixed use (employment led)	300	£ 399	£ 246	£ 94	£ -	£ -	£ -	£ -	£ -
13	Tow n Centre	200	£ 554	£ 371	£ 187	£ 4	£ -	£ -	£ -	£ -
14	Tow n Centre	500	£ 136	£ -	£ -	£ -	£ -	£ -	£ -	£ -
15	Tow n Centre	250	£ 275	£ 93	£ -	£ -	£ -	£ -	£ -	£ -
16	Estate regeneration (small)	10	£ -	£ -	£ -	£ -	£ -	£ -	£ -	£ -
17	Estate regeneration (large)	200	£ -	£ -	£ -	£ -	£ -	£ -	£ -	£ -
18	Student housing	120	£ -	£ -	£ -	£ -	£ -	£ -	£ -	£ -
19	Hotels	67	£ 849	£ 740	£ 631	£ 522	£ 467	£ 412	£ 303	£ -
20	Office	-	£ -	£ -	£ -	£ -	£ -	£ -	£ -	£ -
21	Storage	-	£ -	£ -	£ -	£ -	£ -	£ -	£ -	£ -
22	Residential care home (7 units)	7	£ -	£ -	£ -	£ -	£ -	£ -	£ -	£ -
23	Strategic Site 1	230	£ 489	£ 303	£ 116	£ -	£ -	£ -	£ -	£ -
24	Strategic Site 2	250	£ 411	£ 246	£ 81	£ -	£ -	£ -	£ -	£ -
25	Strategic Site 3	370	£ 321	£ 170	£ 20	£ -	£ -	£ -	£ -	£ -
26	Strategic Site 4	242	£ 492	£ 314	£ 136	£ -	£ -	£ -	£ -	£ -
27	Strategic Site 5	540	£ 219	£ 71	£ -	£ -	£ -	£ -	£ -	£ -
28	Strategic Site 6	180	£ 500	£ 309	£ 118	£ -	£ -	£ -	£ -	£ -
29	Strategic Site 7	181	£ 596	£ 378	£ 160	£ -	£ -	£ -	£ -	£ -

Table 6.7.8: Maximum CIL rates (before buffer), using £10 million per hectare benchmark land value – Zone B

		Resi units	Residential sales values per square metre							
			0%	10%	20%	30%	35%	40%	50%	
1	Very small residential	1	£ -	£ -	£ -	£ -	£ -	£ -	£ -	£ -
2	Small residential developments (backland, infill etc)	5	£ 239	£ 32	£ -	£ -	£ -	£ -	£ -	£ -
3	Small residential developments (backland, infill etc)	11	£ 341	£ 139	£ -	£ -	£ -	£ -	£ -	£ -
4	Small residential developments	25	£ 517	£ 324	£ 130	£ -	£ -	£ -	£ -	£ -
5	Residential development	50	£ 652	£ 461	£ 271	£ 80	£ -	£ -	£ -	£ -
6	Small scale mixed use, local centres	5	£ 1,081	£ 898	£ 715	£ 532	£ 441	£ 349	£ 167	
7	Small scale mixed use, local centres	5	£ 1,004	£ 821	£ 638	£ 455	£ 364	£ 272	£ 89	
8	Small mixed use	25	£ 570	£ 394	£ 218	£ 42	£ -	£ -	£ -	£ -
9	Small mixed use	30	£ 461	£ 288	£ 115	£ -	£ -	£ -	£ -	£ -
10	Mixed use	70	£ 147	£ -	£ -	£ -	£ -	£ -	£ -	£ -
11	Mixed use	150	£ -	£ -	£ -	£ -	£ -	£ -	£ -	£ -
12	Large mixed use (employment led)	300	£ 116	£ -	£ -	£ -	£ -	£ -	£ -	£ -
13	Tow n Centre	200	£ 224	£ 73	£ -	£ -	£ -	£ -	£ -	£ -
14	Tow n Centre	500	£ -	£ -	£ -	£ -	£ -	£ -	£ -	£ -
15	Tow n Centre	250	£ -	£ -	£ -	£ -	£ -	£ -	£ -	£ -
16	Estate regeneration (small)	10	£ -	£ -	£ -	£ -	£ -	£ -	£ -	£ -
17	Estate regeneration (large)	200	£ -	£ -	£ -	£ -	£ -	£ -	£ -	£ -
18	Student housing	120	£ -	£ -	£ -	£ -	£ -	£ -	£ -	£ -
19	Hotels	67	£ 661	£ 570	£ 480	£ 390	£ 345	£ 299	£ 209	
20	Office	-	£ -	£ -	£ -	£ -	£ -	£ -	£ -	£ -
21	Storage	-	£ -	£ -	£ -	£ -	£ -	£ -	£ -	£ -
22	Residential care home (7 units)	7	£ -	£ -	£ -	£ -	£ -	£ -	£ -	£ -
23	Strategic Site 1	230	£ 159	£ 4	£ -	£ -	£ -	£ -	£ -	£ -
24	Strategic Site 2	250	£ 115	£ -	£ -	£ -	£ -	£ -	£ -	£ -
25	Strategic Site 3	370	£ 49	£ -	£ -	£ -	£ -	£ -	£ -	£ -
26	Strategic Site 4	242	£ 171	£ 25	£ -	£ -	£ -	£ -	£ -	£ -
27	Strategic Site 5	540	£ -	£ -	£ -	£ -	£ -	£ -	£ -	£ -
28	Strategic Site 6	180	£ 160	£ 3	£ -	£ -	£ -	£ -	£ -	£ -
29	Strategic Site 7	181	£ 225	£ 43	£ -	£ -	£ -	£ -	£ -	£ -

Table 6.8.1: Alternative CIL rates – Higher value zone – change in residual land value (appraisals assume 20% affordable housing)

Site	Type No	Adopted	Alternative 1	Alternative 2	Alternative 3
Very small residential	1	244,023	242,368	240,430	238,491
Small residential developments (backland, infill etc)	2	562,671	556,788	549,896	543,003
Small residential developments (backland, infill etc)	3	1,235,915	1,222,506	1,206,797	1,191,089
Small residential developments	4	2,397,939	2,367,598	2,332,055	2,296,512
Residential development	5	4,969,493	4,905,566	4,830,679	4,755,792
Small scale mixed use, local centres	6	639,032	631,626	623,721	615,818
Small scale mixed use, local centres	7	605,557	598,662	591,264	583,865
Small mixed use	8	2,615,997	2,579,704	2,540,207	2,500,710
Small mixed use	9	3,119,192	3,075,401	3,028,085	2,980,770
Mixed use	10	3,676,307	3,569,567	3,455,312	3,341,055
Mixed use	11	6,273,643	6,074,286	5,851,524	5,628,761
Large mixed use (employment led)	12	10,702,219	10,244,269	9,769,861	9,295,455
Town Centre	13	6,131,795	5,873,366	5,580,107	5,286,847
Town Centre	14	3,248,267	2,569,421	1,820,022	1,070,622
Town Centre	15	8,059,106	7,731,538	7,361,728	6,991,918
Estate regeneration (small)	16	1,002,025	989,951	975,806	961,661
Estate regeneration (large)	17	1,834,310	1,588,504	1,302,037	1,015,569
Student housing	18	2,704,656	2,628,988	2,547,923	2,466,857
Hotels	19	4,687,083	4,590,726	4,511,304	4,431,881
Office	20	- 382,586	- 392,612	- 397,626	- 402,638
Storage	21	494,283	458,591	433,096	407,601
Residential care home (7 units)	22	227,716	222,317	215,993	209,668
Strategic Site 1	23	10,064,955	9,747,425	9,399,634	9,051,841
Strategic Site 2	24	10,436,937	10,062,819	9,668,753	9,274,688
Strategic Site 3	25	17,553,305	16,918,090	16,271,731	15,625,371
Strategic Site 4	26	5,547,295	5,234,938	4,879,036	4,523,135
Strategic Site 5	27	7,703,284	6,957,057	6,132,170	5,307,284
Strategic Site 6	28	4,723,132	4,496,816	4,235,457	3,974,098
Strategic Site 7	29	8,323,545	8,098,967	7,839,204	7,579,441

Table 6.8.2: Alternative CIL rates – Higher value zone – change in residual land value (appraisals assume 20% affordable housing) – percentage change in residual land values

Site	No	Alt 1	Alt 2	Alt 3
Very small residential	1	0.68%	1.47%	2.27%
Small residential developments (backland, infill etc)	2	1.05%	2.27%	3.50%
Small residential developments (backland, infill etc)	3	1.08%	2.36%	3.63%
Small residential developments	4	1.27%	2.75%	4.23%
Residential development	5	1.29%	2.79%	4.30%
Small scale mixed use, local centres	6	1.16%	2.40%	3.63%
Small scale mixed use, local centres	7	1.14%	2.36%	3.58%
Small mixed use	8	1.39%	2.90%	4.41%
Small mixed use	9	1.40%	2.92%	4.44%
Mixed use	10	2.90%	6.01%	9.12%
Mixed use	11	3.18%	6.73%	10.28%
Large mixed use (employment led)	12	4.28%	8.71%	13.14%
Town Centre	13	4.21%	9.00%	13.78%
Town Centre	14	20.90%	43.97%	67.04%
Town Centre	15	4.06%	8.65%	13.24%
Estate regeneration (small)	16	1.21%	2.62%	4.03%
Estate regeneration (large)	17	13.40%	29.02%	44.63%
Student housing	18	2.80%	5.79%	8.79%
Hotels	19	2.06%	3.75%	5.44%
Office	20	-2.62%	-3.93%	-5.24%
Storage	21	7.22%	12.38%	17.54%
Residential care home (7 units)	22	2.37%	5.15%	7.93%
Strategic Site 1	23	3.15%	6.61%	10.07%
Strategic Site 2	24	3.58%	7.36%	11.14%
Strategic Site 3	25	3.62%	7.30%	10.98%
Strategic Site 4	26	5.63%	12.05%	18.46%
Strategic Site 5	27	9.69%	20.40%	31.10%
Strategic Site 6	28	4.79%	10.33%	15.86%
Strategic Site 7	29	2.70%	5.82%	8.94%

Table 6.8.3: Alternative CIL rates – Lower value zone – change in residual land value (appraisals assume 20% affordable housing)

		Site	Adopted	Alternative 1	Alternative 2	Alternative 3
1	Very small residential	1	200,520	198,866	196,927	194,987
2	Small residential developments (backland, infill etc)	2	433,044	427,160	420,268	413,376
3	Small residential developments (backland, infill etc)	3	944,599	931,190	915,481	899,773
4	Small residential developments	4	1,757,049	1,726,708	1,691,165	1,655,622
5	Residential development	5	3,628,585	3,564,659	3,489,771	3,414,884
6	Small scale mixed use, local centres	6	509,405	501,998	494,094	486,191
7	Small scale mixed use, local centres	7	475,930	469,035	461,636	454,238
8	Small mixed use	8	1,975,107	1,938,814	1,899,317	1,859,820
9	Small mixed use	9	2,319,497	2,275,706	2,228,391	2,181,076
10	Mixed use	10	1,912,869	1,806,130	1,691,875	1,577,618
11	Mixed use	11	2,719,068	2,519,711	2,296,948	2,074,187
12	Large mixed use (employment led)	12	4,106,131	3,648,180	3,173,773	2,699,366
13	Town Centre	13	1,708,819	1,450,391	1,157,132	863,873
14	Town Centre	14	- 6,695,355	- 7,383,807	- 8,143,811	- 8,903,816
15	Town Centre	15	2,358,499	2,030,931	1,661,120	1,291,310
16	Estate regeneration (small)	16	735,993	723,918	709,773	695,629
17	Estate regeneration (large)	17	- 2,625,298	- 2,874,581	- 3,165,102	- 3,455,624
18	Student housing	18	2,704,656	2,628,988	2,547,923	2,466,857
19	Hotels	19	4,045,287	3,948,931	3,869,507	3,790,085
20	Office	20	- 382,586	- 392,612	- 397,626	- 402,638
21	Storage	21	494,283	458,591	433,096	407,601
22	Residential care home (7 units)	22	227,716	222,317	215,993	209,668
23	Strategic Site 1	23	4,650,290	4,332,761	3,984,968	3,637,176
24	Strategic Site 2	24	4,736,330	4,362,212	3,968,146	3,574,080
25	Strategic Site 3	25	9,225,551	8,581,348	7,925,842	7,270,336
26	Strategic Site 4	26	368,430	56,073	- 304,072	- 665,009
27	Strategic Site 5	27	- 2,978,472	- 3,735,258	- 4,571,818	- 5,408,377
28	Strategic Site 6	28	755,537	529,221	267,862	6,503
29	Strategic Site 7	29	3,972,116	3,747,538	3,487,775	3,228,011

Table 6.8.4: Alternative CIL rates – Lower value zone – change in residual land value (appraisals assume 20% affordable housing) – percentage change in residual land values

		Site	Alternative 1	Alternative 2	Alternative 3
1	Very small residential	1	0.83%	1.79%	2.76%
2	Small residential developments (backland, infill etc)	2	1.36%	2.95%	4.54%
3	Small residential developments (backland, infill etc)	3	1.42%	3.08%	4.75%
4	Small residential developments	4	1.73%	3.75%	5.77%
5	Residential development	5	1.76%	3.83%	5.89%
6	Small scale mixed use, local centres	6	1.45%	3.01%	4.56%
7	Small scale mixed use, local centres	7	1.45%	3.00%	4.56%
8	Small mixed use	8	1.84%	3.84%	5.84%
9	Small mixed use	9	1.89%	3.93%	5.97%
10	Mixed use	10	5.58%	11.55%	17.53%
11	Mixed use	11	7.33%	15.52%	23.72%
12	Large mixed use (employment led)	12	11.15%	22.71%	34.26%
13	Town Centre	13	15.12%	32.28%	49.45%
14	Town Centre	14	-10.28%	-21.63%	-32.98%
15	Town Centre	15	13.89%	29.57%	45.25%
16	Estate regeneration (small)	16	1.64%	3.56%	5.48%
17	Estate regeneration (large)	17	-9.50%	-20.56%	-31.63%
18	Student housing	18	2.80%	5.79%	8.79%
19	Hotels	19	2.38%	4.35%	6.31%
20	Office	20	-2.62%	-3.93%	-5.24%
21	Storage	21	7.22%	12.38%	17.54%
22	Residential care home (7 units)	22	2.37%	5.15%	7.93%
23	Strategic Site 1	23	6.83%	14.31%	21.79%
24	Strategic Site 2	24	7.90%	16.22%	24.54%
25	Strategic Site 3	25	6.98%	14.09%	21.19%
26	Strategic Site 4	26	-84.78%	-182.53%	-280.50%
27	Strategic Site 5	27	-25.41%	-53.50%	-81.58%
28	Strategic Site 6	28	29.95%	64.55%	99.14%
29	Strategic Site 7	29	5.65%	12.19%	18.73%

Figure 6.9.1: Comparison of residual land values with the adopted and three alternative CIL rates (typologies 1 to 8)

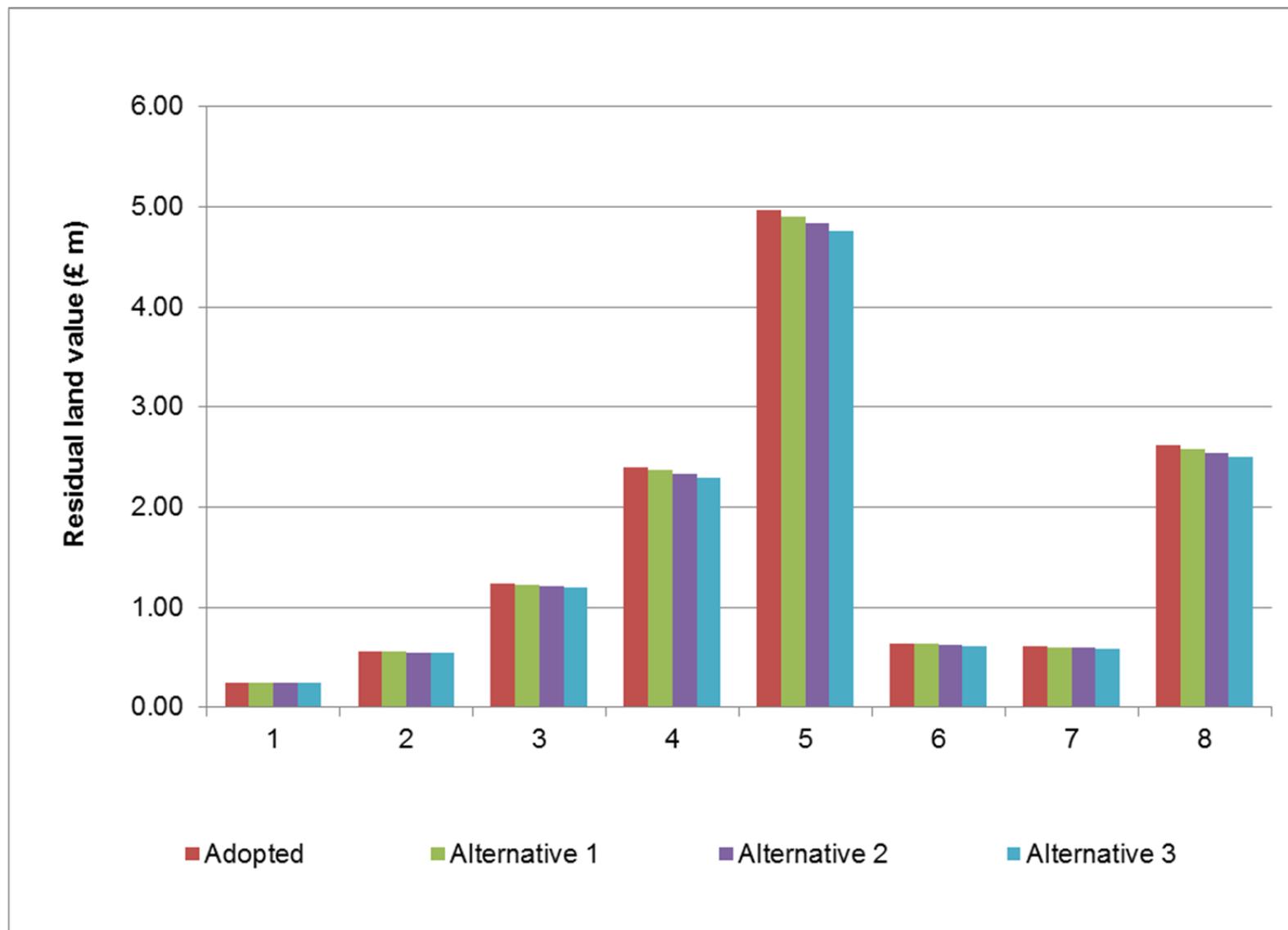


Figure 6.9.2: Comparison of residual land values with the adopted and three alternative CIL rates (typologies 9 to 14)

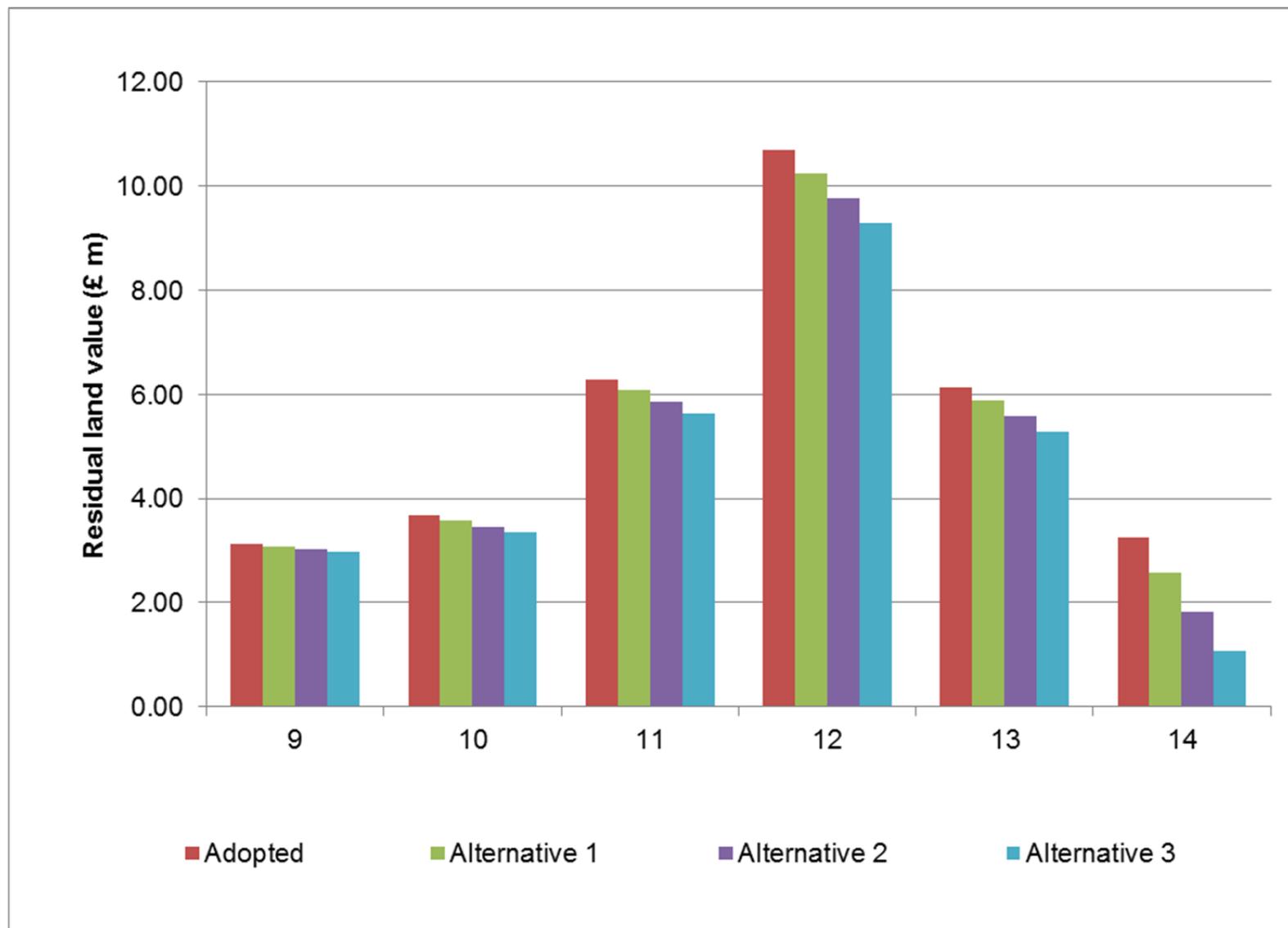


Figure 6.9.3: Comparison of residual land values with the adopted and three alternative CIL rates (typologies 15 to 18)

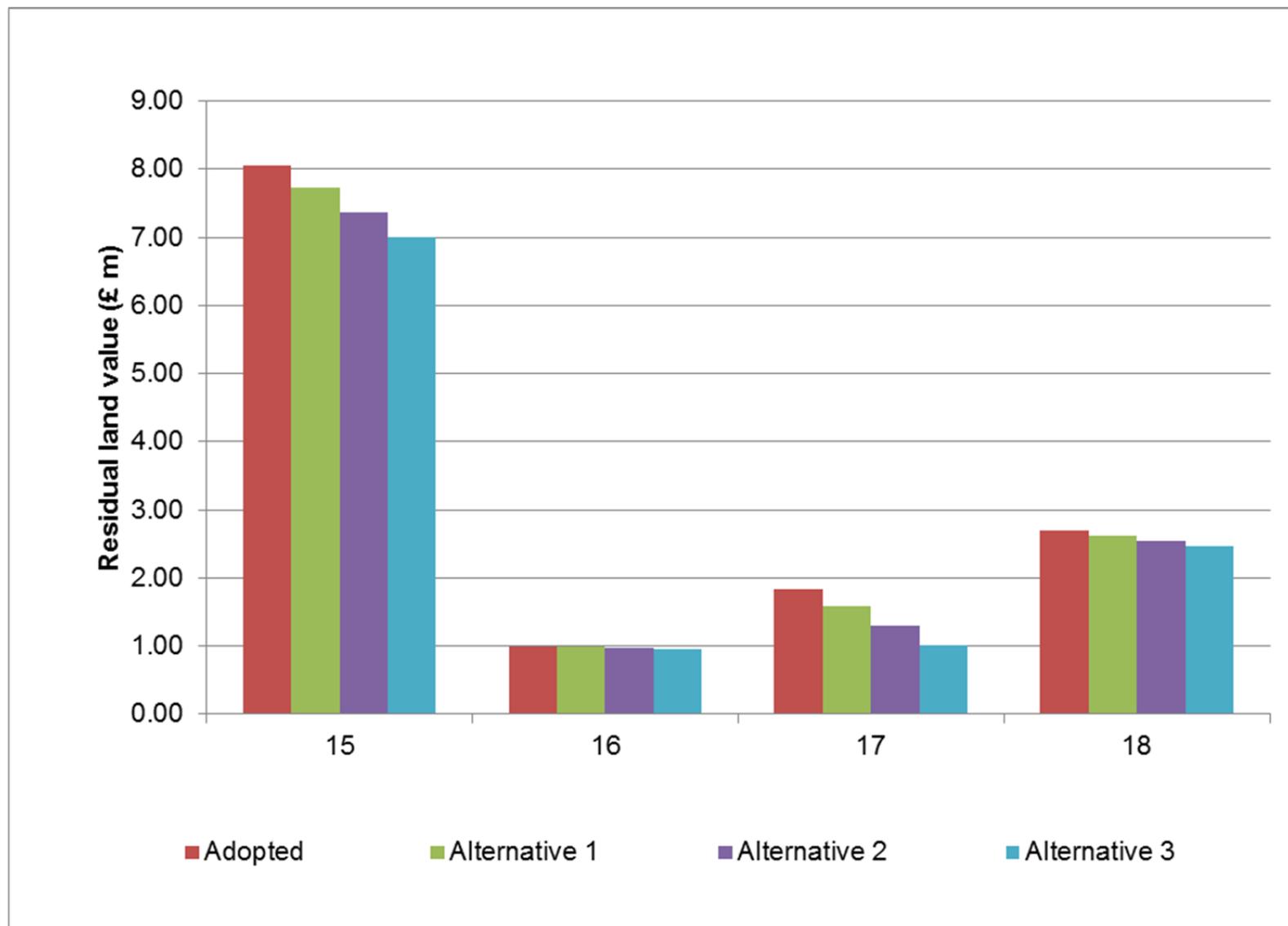


Figure 6.9.4: Comparison of residual land values with the adopted and three alternative CIL rates (typologies 19 to 23)

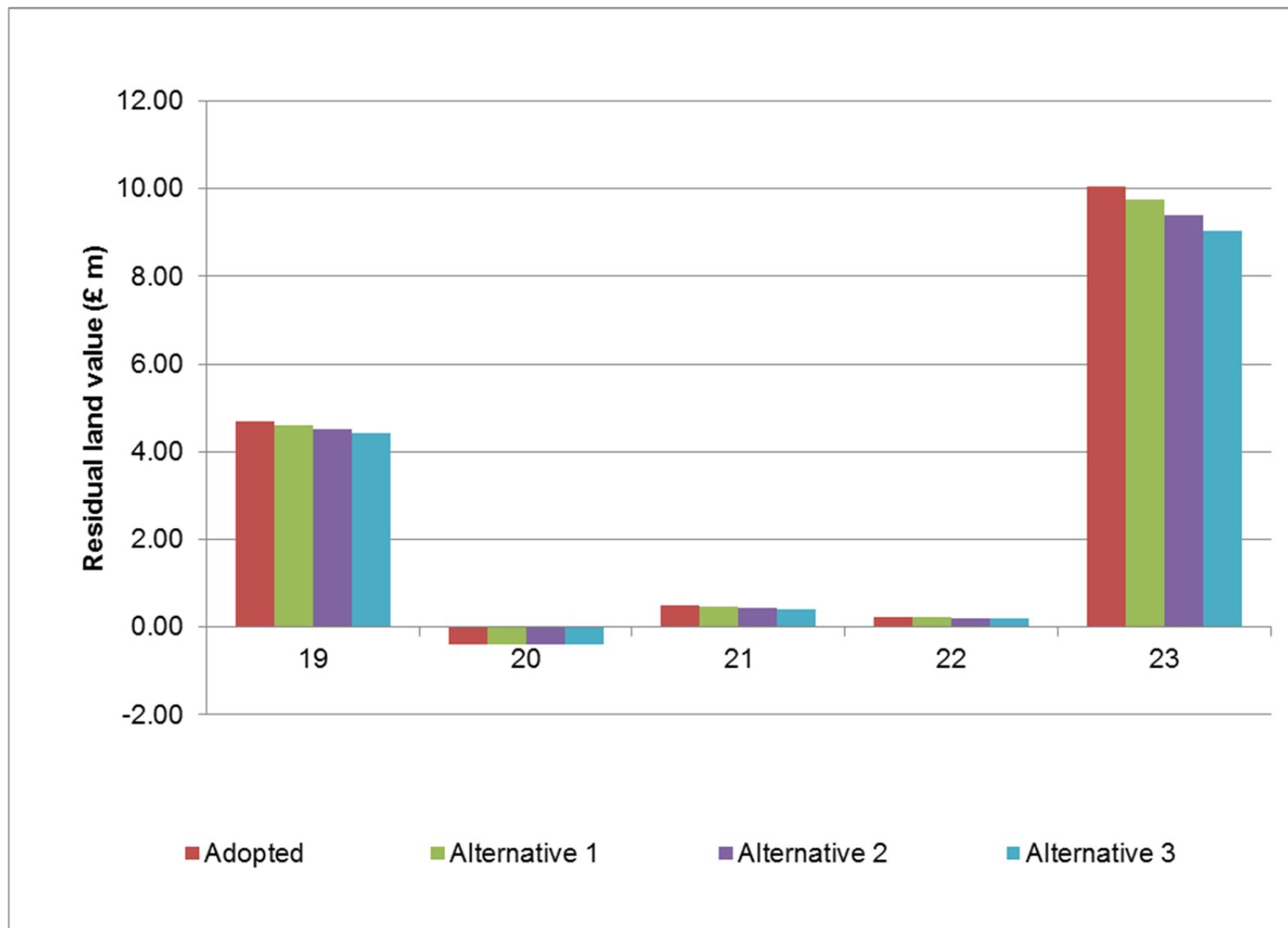
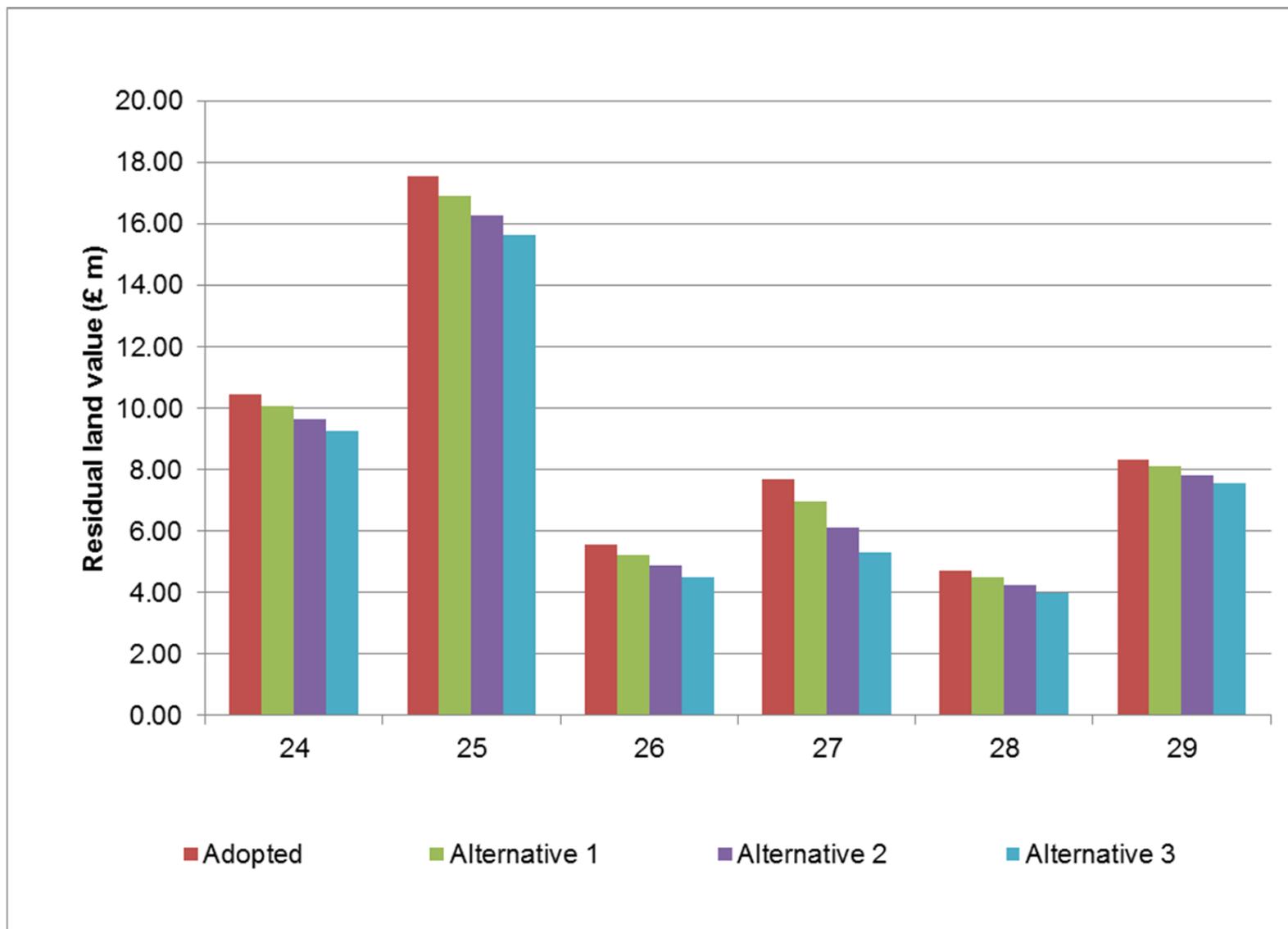


Figure 6.9.5: Comparison of residual land values with the adopted and three alternative CIL rates (typologies 25 to 29)



Residential rates

- 6.11 As noted earlier in this report, the north of the borough will benefit from the extension of the Bakerloo Line to Lewisham, with an intermediate station at New Cross. This will significantly improve the potential for sales values in these areas to increase, as noted and accepted at Southwark's CIL Examination on revisions to their Charging Schedule for areas in Southwark that are located within the Bakerloo Line Extension corridor. Although the evidence in the preceding section shows a wide range of results, we consider that the current higher value zone could be increased to £200 per square metre without affecting the delivery of the Local Plan.
- 6.12 In the rest of the borough, the evidence indicates that an increase from the current rate of £70 per square metre (£79 per square metre with indexation) to £125 per square metre will be viable in most situations and readily absorbed through modest reductions in residual land values
- 6.13 We attach as Appendix 3 the results of our sensitivity analysis which builds in the growth rates on sales values and inflation on costs identified in Table 4.3.1. In this analysis, we have also increased the benchmark land values by 20% to reflect the possibility that existing use values may also increase over time. The results indicate that schemes will become more viable and the 'buffer' or 'margin' between the theoretical maximum CIL rates and the proposed rates will widen. This will increase the capacity of schemes to provide higher levels of affordable housing (towards or at the strategic target level of 50%) or generate higher returns to landowners. As noted previously, these results should be treated with a degree of caution as forecasts are based on assumptions on a range of factors that may change.
- 6.14 A key consideration for the Council is the interaction between CIL contributions and affordable housing, noting of course our earlier comments that securing both CIL and affordable housing are essential objectives. Like other planning authorities, the Council cannot seek to secure affordable housing to the total exclusion of financial contributions towards essential community infrastructure, and vice-versa. Increased rates should, in most circumstances, be passed on to the landowner through modest reductions in residual land values, but where this cannot happen (due to a high existing use value, for example), there may be a reduction in affordable housing in comparison to a 'no CIL' scenario.
- 6.15 We have therefore run a theoretical exercise to test the impact of the proposed CIL rates on the level of affordable housing to establish the change in affordable housing if it is not possible to pass the increased CIL liability to the land owner through a reduction in land value²³. Tables 6.15.1 and 6.15.2 summarise this analysis; for each scheme, we show the residual land value with the adopted CIL rate and the reduction arising from the increase in the CIL rate. We then reduce the affordable housing in order to restore the residual land value back to its previous level. Clearly schemes in the expanded Zone A (which now includes the Bakerloo Line Extension corridor) will benefit from increasing residential sales values, so the reductions in affordable housing shown here will be mitigated to an extent.

Table 6.15.1: Theoretical reduction in affordable housing required to offset increase in CIL rates (higher value zone)

Site ref	Site type	Number of units	RLV – incorporating adopted CIL	RLV – incorporating proposed CIL	Change in affordable housing required to offset increase in CIL
1	Very small residential	1	£227,796	£218,975	2.80%
2	Small residential developments (backland, infill etc)	5	£515,007	£483,646	3.40%

²³ The draft Planning Practice Guidance notes that land values should reflect planning policy requirements, including CIL. Developers should take account of policy requirements when formulating bids for sites.

Site ref	Site type	Number of units	RLV – incorporating adopted CIL	RLV – incorporating proposed CIL	Change in affordable housing required to offset increase in CIL
3	Small residential developments (backland, infill etc)	11	£1,129,420	£1,057,943	3.50%
4	Small residential developments	25	£2,166,398	£2,004,668	3.70%
5	Residential development	50	£4,487,777	£4,147,019	3.70%
6	Small scale mixed use, local centres	5	£591,368	£556,460	3.80%
7	Small scale mixed use, local centres	5	£557,893	£524,508	3.70%
8	Small mixed use	25	£2,384,456	£2,208,865	4.00%
9	Small mixed use	30	£2,830,298	£2,616,630	3.90%
10	Mixed use	70	£3,048,425	£2,534,391	7.80%

Table 6.15.2: Theoretical reduction in affordable housing required to offset increase in CIL rates (lower value zone)

Site ref	Site type	Number of units	RLV – incorporating adopted CIL	RLV – incorporating proposed CIL	Change in affordable housing required to offset increase in CIL
1	Very small residential	1	£187,012	£183,643	1.30%
2	Small residential developments (backland, infill etc)	5	£393,481	£381,504	1.50%
3	Small residential developments (backland, infill etc)	11	£856,311	£829,014	1.60%
4	Small residential developments	25	£1,565,563	£1,503,798	1.60%
5	Residential development	50	£3,230,675	£3,100,538	1.70%
6	Small scale mixed use, local centres	5	£469,843	£455,330	1.90%
7	Small scale mixed use, local centres	5	£436,367	£422,873	1.70%
8	Small mixed use	25	£1,783,622	£1,711,949	1.90%
9	Small mixed use	30	£2,080,585	£1,994,616	1.80%
10	Mixed use	70	£1,395,202	£1,186,415	2.10%

Commercial rates

- 6.16 The borough is still seeing losses of B use class floorspace and our testing confirms that new office and industrial development is unlikely to be able to make a significant contribution towards infrastructure. However, the viability testing shows that a modest contribution of circa £20 per square metre could be achieved, although the extent to which any income will be generated depends upon the extent to which additional floor area is created. The Council's 2016/17 Annual Monitoring Report notes that new B use class floorspace is not yet exceeding existing space, so in these circumstances little new B use class development would generate a CIL contribution.

Other uses

- 6.17 Other uses covered by the existing “all other uses” rate in the adopted CIL Charging Schedule (retail, student housing and hotels) show varying viability but the evidence points to an increase from the current £80 per square metre charge (£90 after indexation) to £160 per square metre.

Strategic sites

- 6.18 Other charging authorities consider strategic sites to be those that will, when developed, account for 5% or more of housing supply identified in the Plan. The largest of the strategic sites will provide circa 540 units, which will account for only 2.9% of housing units identified in the Local Plan. None of the sites therefore meet the criteria applied elsewhere for ‘strategic sites’ but they are nevertheless important in terms of housing supply.
- 6.19 With the exception of Strategic Site 3, the other 6 strategic sites are located within the expanded Zone 1. Strategic Site 3 is located on the border of Zones 1 and 2, but is able to absorb a CIL at an increased rate of £125 per square metre alongside affordable housing of between 30% and 35% affordable housing.
- 6.20 The other strategic sites will also be able to absorb the proposed rate of £200 per square metre alongside varying levels of affordable housing, ranging from 10% to 30% affordable housing. Clearly on these sites there is potential for the Council to maintain or increase affordable housing on these sites by funding community infrastructure using CIL or other Council resources.
- 6.21 The CIL liability based on the rates in the adopted CIL Charging Schedule ranges from 1.82% to 2.41% of development costs. Application of the proposed rates results in a modest increase to 2.97% to 3.65% of development costs.
- 6.22 The results of the appraisals indicate that the proposed CIL rates should be applied to the schemes identified by the Council as being of strategic importance to the delivery of the scale of housing and other uses identified in the Plan.

Potential income

- 6.23 We have run an illustrative high-level calculation of the potential increase in CIL income that the proposed rates could generate. This is based on an assumption of 1,668 units per annum²⁴ over a five year period, 65% of which are assumed to be in the higher value zone and the remaining 35% in the lower value zone. In addition, we have assumed that there are 5,000 square metres of net additional B1 office and 6,000 square metres of net additional B2/B8 floorspace²⁵. In both bases, we have assumed that there will be a 30% offset of existing floorspace. Social housing relief is applied to 20% of residential floorspace.
- 6.24 The results of this high level calculation are summarised in Table 6.24.1 (showing the income derived from the current rates with indexation) and Table 6.17.2 (proposed rates). The proposed increase in CIL rates from the current indexed rates would increase total CIL income from £39 million to £68 million in today’s terms (i.e. before indexation).

Table 6.24.1: CIL income with current rates

	2018/19	2019/20	2020/21	2021/22	2022/23	Totals
Residential units	1,668	1,668	1,668	1,668	1,668	
Ave sqm per unit sqm	80	80	80	80	80	
Total GIA sqm	133,440	133,440	133,440	133,440	133,440	
<i>Private only sqm</i>	<i>106,752</i>	<i>106,752</i>	<i>106,752</i>	<i>106,752</i>	<i>106,752</i>	

²⁴ Based on the most recent year’s completions from the AMR.

²⁵ These figures are adopted for illustrative purposes to assist the Council in understanding the relative contribution that applying a CIL rate to these uses might make. Clearly if the current trend of net losses of these types of use continue then there will be little or no CIL liable space within B1 and B2/B8 use classes.

	2018/19	2019/20	2020/21	2021/22	2022/23	Totals
Net of existing floorspace	74,726	74,726	74,726	74,726	74,726	
Zone A GIA sqm	48,572	48,572	48,572	48,572	48,572	
Zone B GIA sqm	29,891	29,891	29,891	29,891	29,891	
CIL rate Zone A	£112	£112	£112	£112	£112	
CIL rate Zone B	£79	£79	£79	£79	£79	
Income Zone A	£5,440,082	£5,440,082	£5,440,082	£5,440,082	£5,440,082	£27,200,410
Income Zone B	£2,361,354	£2,361,354	£2,361,354	£2,361,354	£2,361,354	£11,806,771
B1 office	5,000	5,000	5,000	5,000	5,000	
Net of existing floorspace	3,500	3,500	3,500	3,500	3,500	
B2 industrial	6,000	6,000	6,000	6,000	6,000	
Net of existing floorspace	4,200	4,200	4,200	4,200	4,200	
B1/B2 CIL rate	0	0	0	0	0	
Income - offices	-	-	-	-	-	-
Income - industrial	-	-	-	-	-	-
INCOME FROM ALL USES	£7,801,436	£7,801,436	£7,801,436	£7,801,436	£7,801,436	£39,007,181

Table 6.24.2: CIL income with proposed rates

	2018/19	2019/20	2020/21	2021/22	2022/23	Totals
Residential units	1,668	1,668	1,668	1,668	1,668	
Ave sqm per unit sqm	80	80	80	80	80	
Total GIA sqm	133,440	133,440	133,440	133,440	133,440	
Private only sqm	106,752	106,752	106,752	106,752	106,752	
Net of existing floorspace	74,726	74,726	74,726	74,726	74,726	
Zone A GIA sqm	48,572	48,572	48,572	48,572	48,572	
Zone B GIA sqm	29,891	29,891	29,891	29,891	29,891	
CIL rate Zone A	200	200	200	200	200	
CIL rate Zone B	125	125	125	125	125	
Income Zone A	£9,714,432	£9,714,432	£9,714,432	£9,714,432	£9,714,432	£48,572,160
Income Zone B	£3,736,320	£3,736,320	£3,736,320	£3,736,320	£3,736,320	£18,681,600
B1 office	5,000	5,000	5,000	5,000	5,000	
Net of existing floorspace	3,500	3,500	3,500	3,500	3,500	
B2 industrial	6,000	6,000	6,000	6,000	6,000	
Net of existing floorspace	4,200	4,200	4,200	4,200	4,200	
B1/B2 CIL rate	20	20	20	20	20	

	2018/19	2019/20	2020/21	2021/22	2022/23	Totals
Income - offices	70,000	70,000	70,000	70,000	70,000	350,000
Income - industrial	84,000	84,000	84,000	84,000	84,000	420,000
INCOME FROM ALL USES	£13,604,752	£13,604,752	£13,604,752	£13,604,752	£13,604,752	£68,023,760

7 Conclusions and recommendations

- 7.1 The NPPF states that the cumulative impact of local planning authority standards and policies “*should not put implementation of the plan at serious risk, and should facilitate development throughout the economic cycle*”. The draft NPPF echoes this requirement, stating that “*Plans should set out the contributions expected in association with particular sites and types of development. This should include setting out the levels and types of affordable housing provision required, along with other infrastructure (such as that needed for education, health, transport, green and digital infrastructure). Such policies should not make development unviable, and should be supported by evidence to demonstrate this*”. This report and its supporting appendices test the ability of development typologies in Lewisham to support local plan policies while making contributions to infrastructure that will support growth through CIL.
- 7.2 The Council's adopted CIL rates have been in place since 1 April 2015 and there has been no demonstrable adverse impact on the supply of housing land or upon the viability of developments coming forward across the Borough. Since the evidence base for the adopted CIL was prepared, there have been changes to sales values and build costs. Our testing of alternative CIL rates indicates that relatively significant changes could be accommodated without adversely impacting on viability to a sufficient degree to impact on land supply.
- 7.3 As a result of indexation, the CIL rates are now circa 12% higher than they were adopted. The proposed Mayoral CIL will also increase from £35 per square metre to £60 per square metre in April 2019 if the rates are not amended through the Examination process.
- 7.4 The proposed CIL rates for the borough are summarised in Table 7.4.1. Developments in Zone 1 will benefit from the opportunities derived from the Bakerloo Line Extension, which will enable developers to benefit from increased density and higher sales values. An increase to £200 per square metre will secure much needed additional income to assist with provision of infrastructure that these developments will require. In Zone 2, developments have enhanced capacity to absorb an increase in CIL from £79 per square metre (with indexation) to £125 per square metre as a result of increasing sales values.

Table 7.4.1: Proposed changes to CIL rates

Development type	Zone	Adopted rate	Indexed rate	Proposed rate
Residential C3 use class	Zone 1 ²⁶	£100	£112	£200
	Zone 2 ²⁷	£70	£79	£125
B use classes	Whole borough	£0	£0	£0
All other uses	Whole Borough	£80	£90	£160

- 7.5 The borough is still seeing losses of B use class floorspace and our testing confirms that new office and industrial development is unlikely to be able to make a significant contribution towards infrastructure. The viability testing shows that a modest contribution of circa £20 per square metre could in principle be applied to B use class developments, although the extent to which any income will be generated depends upon the extent to which additional floor area is created. The Council's 2016/17 Annual Monitoring Report notes that new B use class floorspace is not yet exceeding existing space, so in these circumstances little or new B use class development would generate a CIL contribution. If these trends change in the future, the Council could revisit their approach to CIL charges on B use class developments in a future CIL review.
- 7.6 Other uses covered by the existing "all other uses" rate in the adopted CIL Charging Schedule (retail, student housing and hotels) show varying viability but the evidence points to an increase from the current £80 per square metre charge (£90 after indexation) to £160 per square metre.

²⁶ Postcode sectors SE3, SE8, SE10 and SE16 and the Bakerloo Line Extension corridor to Lewisham

²⁷ Postcode sectors BR1, BR3, SE4, SE9, SE12, SE13, SE14, SE15, SE23 and SE26

- 7.7 Our testing indicates that the increase in CIL rates will have a relatively modest impact on residual land values in most cases. Where it is not possible to pass the cost of increased CIL rates back to the landowner through a reduction in land value (for example, due to high existing use values), the increase will have a modest impact on affordable housing levels that can be delivered. However, increases in sales values since the last Charging Schedule was formulated have outstripped increases in costs, which has resulted in improvements in viability and enhanced capacity for absorbing CIL requirements. The sensitivity analysis at Appendix 3 indicates that if forecast growth and cost inflation reflect outturn values, there will be a further enhancement in viability and an increased margin between the proposed rates and the theoretical maximum rates.
- 7.8 There is clearly a need to balance the need to deliver affordable housing with the need to secure contributions to fund community infrastructure that will support development and growth. The Council cannot seek to prioritise securing affordable housing to the exclusion of securing funding for infrastructure and vice versa. In our view, the proposed rates strike this balance appropriately.
- 7.9 The Council needs to strike a balance between achieving its aim of meeting needs for affordable housing with raising funds for infrastructure, and ensuring that developments generate acceptable returns to willing landowners and willing developers. This study demonstrates that the Council's flexible approach to applying its affordable housing requirements ensures that these objectives are balanced appropriately.

Strategic Sites

- 7.10 With the exception of Strategic Site 3, the other 6 strategic sites are located within the expanded Zone 1. Strategic Site 3 is located on the border of Zones 1 and 2, but is able to absorb a CIL at an increased rate of £125 per square metre alongside affordable housing of between 30% and 35% affordable housing.
- 7.11 The other strategic sites will also be able to absorb the proposed rate of £200 per square metre alongside varying levels of affordable housing, ranging from 10% to 30% affordable housing. Clearly on these sites there is potential for the Council to maintain or increase affordable housing on these sites by funding community infrastructure using CIL or other Council resources.
- 7.12 The CIL liability based on the rates in the adopted CIL Charging Schedule ranges from 1.82% to 2.41% of development costs. Application of the proposed rates results in a modest increase to 2.97% to 3.65% of development costs.
- 7.13 The results of the appraisals indicate that the proposed CIL rates should be applied to the schemes identified by the Council as being of strategic importance to the delivery of the scale of housing and other uses identified in the Plan.

Additional observations

- 7.14 Viability measured in present value terms is only one of several factors that determine whether a site is developed. Developers need to maintain a throughput of sites to ensure their staff are utilised and they can continue to generate returns for their shareholders. Consequently, small adjustments to residual land values resulting from changes to CIL rates can be absorbed in almost all circumstances by developers taking a commercial view on the impact. However, in most cases the impact on land value is sufficiently modest that this can be passed onto the land owner at the bid stage without adversely impacting on the supply of land for development.
- 7.15 In most cases, the changes in residual land values required to accommodate the increased CIL rates is very modest and the CIL itself accounts for a very small proportion of overall development costs (typically well below 5%). The imposition of CIL is therefore not the critical factor in determining whether or not a scheme will come forward.
- 7.16 In considering the outputs of the appraisals, it is important to recognise that some developments will be unviable regardless of the Council's requirements. In these cases, the value of the existing building will be higher than a redevelopment opportunity over the medium term. However, this situation should not be taken as an indication of the viability (or otherwise) of the Council's policies and requirements.

- 7.17 It is critical that developers do not over-pay for sites such that the value generated by developments is paid to the landowner, rather than being used to provide affordable housing. The Council should work closely with developers to ensure that landowners' expectations of land value are appropriately framed by the local policy context and adjusted for the proposed CIL rates. There may be instances when viability issues emerge on individual developments, even when the land has been purchased at an appropriate price (e.g. due to extensive decontamination requirements). In these cases, some flexibility may be required subject to submission of a robust site-specific viability assessment.
- 7.18 This study demonstrates that the proposed increase to the CIL charges and the Councils flexible approach to applying policy requirements will ensure an appropriate balance between delivering affordable housing, sustainability objectives, necessary infrastructure and the need for landlords and developers to achieve a return in line with the NPPF.

Appendix 1 - Policy review

Policy Number	Policy Name	Summary of Requirement	Cost Analysis
Core Strategy Policy 1	Housing provision, mix and affordability	No net loss of housing. 50% affordable housing from all sources. 70% social rented and 30% intermediate. Provision of 3 bed plus units including 42% of affordable housing. Built to lifetime homes standard and 10% provided as wheelchair housing.	Key policy tested for viability. Tested at 0% to 100% affordable in 10 increments plus 35% AH. AH tested with 70/30 and 60/40 tenure split.
Core Strategy Policy 2	Gypsies and Travellers	Assess and provide for the identified needs of gypsies and travellers.	N/A
Core Strategy Policy 3	Strategic Industrial Locations and Local Employment Locations	Sets out that the Council will protect Strategic Industrial Locations for uses within the B use Class and also appropriate sui generis uses. Protect Local Employment Locations for a range of uses within the B use classes.	N/A
Core Strategy Policy 4	Mixed Use Employment Locations	Comprehensive development of Mixed Use Employment Locations. B use class 20% of floor space, proportion of affordable housing, improvements to environmental quality and social cultural and leisure facilities of the area. Enable continued employment functioning of the areas. Require a Master plan.	Provision of B uses, affordable housing and environmental improvements required to bring schemes forward will have an impact on the viability of development of MELs. Only applies to some sites. Covered by other specific policies e.g. Affordable housing.
Core Strategy Policy 5	Other employment locations	Protects the scattering of employment locations outside SILs, LELs, and MUELs. Employment land in town centres which has potential to contribute to a Major town centre, District Hub, Local Hub or other cluster of businesses uses should be recommended for retention. Other uses supported if certain conditions show that the site should not be retained in employment use.	Only relevant to some sites. Viability of redevelopment is one of several considerations in the policy for allowing other uses.
Core Strategy Policy 6	Retail hierarchy and location of retail development	Sets out retail hierarchy. Expect major retail leisure, arts, cultural and entertainment facilities to be located in major and district centres. Designate primary and secondary frontages to ensure essential services are maintained. Protect local shopping facilities from change of use where there is a demand for services. In neighbourhood local centres and parades, consider change of use only in certain circumstances. Support retail hierarchy through markets etc.	No additional costs.

Policy Number	Policy Name	Summary of Requirement	Cost Analysis
Core Strategy Policy 7	Climate change and adapting to the effects	Partnership approach to implement the principles of avoidance, mitigation and adaptation to reduce CO2 emissions. Applying London Plan policies relevant to Climate Change. Development required to be air quality neutral.	London Housing SPG (Standard 35) requires zero carbon home which will have an additional cost.
Core Strategy Policy 8	Sustainable design and construction and energy efficiency	Sets out a number of requirements for major developments including submission of a SS and ES, maximising energy and water efficiency measures, connecting to existing or approved decentralised energy networks and safeguarding routes for future connection, integrating on-site renewable energy generation into design of building, reduce CO2 emissions. Minimum code for Sustainable Homes level 6. Non-residential development to achieve BREEAM Excellent.	Code for sustainable homes no longer required as tied in to building regulations. BREEAM Excellent requirement for non-residential development will have an additional cost.
Core Strategy Policy 9	Improving local air quality	Seek to improve air quality working with businesses and TfL to manage and improve air quality.	Addressed under DM policy. Standard. May be some additional costs through planning obligations but this will be included in the S106 assumptions.
Core Strategy Policy 10	Managing and reducing the risk of flooding	Demonstrate positive reduction in flood risk. Use of London Plan SPG Sustainable Design and Construction.	Policy reflects national and regional guidance. London Plan (Standard 39) requires SUDs/living roofs to achieve a greenfield run-off rate. No additional costs.
Core Strategy Policy 11	River and waterways network	Development adjacent to rivers should contribute to their special character by improving urban design quality, vitality of river frontages and improving access to the foreshore and naturalising flood defences.	Could involve additional costs but only relevant to some sites.
Core Strategy Policy 12	Open space and environmental assets	Conserve nature, green the public realm provide opportunities for sport, recreation, leisure and well-being. Protect open spaces. Maintain and improve accessibility to open space. Preserve or enhance local biodiversity. Protect trees. New on-site provision of open space. Maximise opportunities for sport and recreation. Promote living roofs. Promote and support local food growing.	Provision of open space, children's play space and improving accessibility to open space should be standard and where it is not included on-site would be secured through planning obligations.

Policy Number	Policy Name	Summary of Requirement	Cost Analysis
Core Strategy Policy 13	Addressing Lewisham's waste management requirements	Major developments to submit a SWMP. Design in waste management and disposal. Require integrated recycling facilities	Standard requirements. No additional costs
Core Strategy Policy 14	Sustainable movement and transport	Car parking standards, submission of travel plans, provision of cycle parking.	Most TA/TS/TP are standard. Some additional costs through specific S.278 works or through planning obligations.
Core Strategy Policy 15	High quality design for Lewisham	Highest quality design. Housing densities as outlined in the London Plan. Achieve 'central' density levels within the Lewisham Town Centre. Achieve 'urban' density levels in the Catford Town Centre. New development in Lewisham and Catford town centres should result in a radical upgrading of the social and physical environment. Building for Life standards.	Standard requirement. No additional costs.
Core Strategy Policy 16	Conservation areas, heritage assets and the historic environment.	Value and significance monitored, reviewed, enhanced and conserved.	Only relevant to some sites. Depends on mitigation required.
Core Strategy Policy 17	The protected vistas the London panorama and local views, land marks and panoramas	Ensure new development does not impede or detract from local views or obscure local landmarks.	Some site layouts and design would need to reflect the need to safeguard views but otherwise no additional cost to development.
Core Strategy Policy 18	The location and design of tall buildings	May be appropriate in specific locations identified in Lewisham Tall Building Study. Highest design quality.	No additional costs aside from the inherent additional cost of building a tall building.
Core Strategy Policy 19	Provision and maintenance of community and recreational facilities	No net loss of facilities and needs of current and future populations are met.	No additional costs.
Core Strategy Policy 20	Delivering education achievements, healthcare provision and promoting healthy lifestyles	Support implementation of the School Implementation Plan and NHS Lewisham Commissioning Strategy Plan.	No additional costs.
Core Strategy Policy 21	Planning obligations	Sets out basis for seeking planning obligations.	Key policy to be assessed. Additional costs to development.
DM Policy 1	Presumption in favour of sustainable development	Presumption in favour of sustainable development as set out in NPPF.	No additional costs.
DM Policy 2	Prevention of loss of existing housing	The Council will only grant planning permission for the loss of housing by demolition, redevelopment or change of use in particular circumstances.	Only relevant to some sites. No additional costs.
DM Policy 3	Conversion of a single family house to two or more dwellings	Refuse planning permission for the conversion of a single family house into flats except where environmental conditions mean that the single family house is not suitable for family accommodation.	Only relevant to some sites. No additional costs.

Policy Number	Policy Name	Summary of Requirement	Cost Analysis
DM Policy 4	Conversions of office space and other B Use Class space into flats	The Council will support the conversion of office space and other B Use Class space into self-contained flats in certain circumstances.	Overtaken somewhat by other policies (PD rights). Only relevant to some developments. No additional costs.
DM Policy 5	Specialist accommodation for older people	Support proposals for specialist accommodation for older people provided that the development meets particular criteria. Where accommodation is provided on a freehold or leasehold basis, the Council will expect the development to supply an appropriate percentage of affordable housing in accordance with Core Strategy Policy 1	Only relevant to some developments. Affordable housing provision would be an additional cost but covered by other policies.
DM Policy 6	Houses in multiple occupation (HMO)	Sets out criteria for when the provision of HMOs is appropriate. Will resist the loss of good quality HMOs.	N/A
DM Policy 7	Affordable rented housing	Requires new residential development to provide maximum possible onsite affordable housing in accordance with Core Strategy Policy 1. Prioritises the provision of family units.	Key policy to be tested for viability as part of the project brief. Covered by Core Strategy Policy 1
DM Policy 8	Student housing	Addresses the loss of student housing and the provision of housing with an affordable housing component.	Only relevant to certain sites. No additional costs as affordable housing covered by other policies.
DM Policy 9	Mixed use employment locations (MEL)	Sets out criteria for change of use applications including comprehensive mixed use redevelopment, provision of Local employment opportunities, lower cost accommodation for starter Businesses, 20% B Use Class, the continued employment functioning of the area and internal fit out of space.	Only relevant to some sites. Some additional costs including affordable housing provision, 20% B use class, and internal fit out. Affordable housing covered in other policies. The fit out of units would be an additional cost when developing only to shell and core.
DM Policy 10	Local Employment Locations (LEL)	Support uses within the B Use Class. Requires floor space for Small and Medium Enterprises New build will be required to be flexibly specified and provided with an internal fit out. The provision of lower cost accommodation suitable for starter businesses should form part of any new scheme.	Only relevant to some sites. Fit out of units and lower cost starter business accommodation would add to development costs where space is only provided to shell and core.
DM Policy 11	Other employment locations Sites in Town Centres, Local Hubs and other clusters of commercial and/or retail uses	Redevelopment supported subject to certain criteria. May seek contributions to training and/or local employment schemes and/or require the internal fit out of units and provide a proportion of lower cost accommodation suitable for start-up businesses.	Only relevant to certain sites. Contributions and fit out would be an additional cost where scheme built to shell and core. Low cost accommodation would reduce GDV.

Policy Number	Policy Name	Summary of Requirement	Cost Analysis
DM Policy 12	Hotels	Sets out criteria for when hotel development would be considered appropriate including provision of 10% wheelchair accessible bedrooms, high quality design, transport and sustainability considerations.	Only relevant to certain sites. Standard. No additional costs.
DM Policy 13	Location of main town centre uses	Location of main town centre uses in accordance with Core Strategy Policy 6. P proposals including 1,000 m2 of retail floor space on the edge or outside of the major and district centres require an impact assessment and only considered subject to certain criteria including the possible need for planning obligations.	Only relevant to certain sites. No cost implications apart from the possibility of planning obligations being imposed.
DM Policy 14	District centres shopping frontages	Sets out criteria for acceptable change of use within district centres	Only relevant to certain sites. No additional costs.
DM Policy 15	Neighbourhood local centres	Change of use only acceptable subject to certain criteria including highest quality design and that adequate provision for access for people with disabilities is made.	Only relevant to certain sites. Standard. No additional costs.
DM Policy 16	Local shopping parades and corner shops	Retention of A1 shops unless certain criteria are met. Change of use to residential ground floor use only acceptable subject to certain criteria.	N/A
DM Policy 17	Restaurants and cafés (A3 uses) and drinking establishments (A4 uses)	Sets out when the Council will consider proposals for restaurants, cafes and drinking establishments and issues to be addressed such refuse and litter, odour and provision of sound proofing when located living accommodation.	Only relevant to certain sites. Standard. No additional costs.
DM Policy 18	Hot food take-away shops (A5 uses)	Sets out when the Council will consider proposals for hot food take-away shops and issues to be addressed such refuse and litter, odour and provision of sound proofing when located living accommodation.	Only relevant to certain sites. Standard. No additional costs.
DM Policy 19	Shop fronts, signs and hoardings	Shop fronts should be designed to a high quality and reflect and improve the character and Quality of their surroundings.	Only relevant to certain sites. No additional costs.
DM Policy 20	Public houses	Sets out criteria for change of use or redevelopment of public houses including possible retention of the building with a D use on the ground floor as part of a redevelopment.	Only relevant to certain sites. No additional costs.
DM Policy 21	Mini cab or taxi offices	Sets out criteria for when they will be acceptable	Only relevant to certain sites. No additional costs.

Policy Number	Policy Name	Summary of Requirement	Cost Analysis
DM Policy 22	Sustainable design and construction	All developments to maximise the incorporation of design measures to maximise energy efficiency, manage heat gain and deliver cooling and non-residential development to meet BREEAM excellent.	Most are standard policy requirements. BREEAM Excellent could be an additional cost to the scheme.
DM Policy 23	Air Quality	Requires submission of an Air Quality Impact Assessment and set out mitigation measures.	Will vary from site to site. Addressed as part of scheme or through planning obligations.
DM Policy 24	Biodiversity, living roofs and artificial playing pitches	Applications must take into account biodiversity and geodiversity in design. When providing living roofs ensure extensive substrate base where possible. Locate artificial playing pitches on hard surfaces or previously developed land where possible and consider drainage and surface flooding.	Costs dependent on site. Can also be considered standard requirement.
DM Policy 25	Landscaping and trees	All major developments and some minor to provide a landscape scheme including a 5 year management plan. Trees to be retained or replaced.	Standard. No additional costs.
DM Policy 26	Noise and vibration	Noise and or vibration generating development to be located in certain areas. Studies to be undertaken to assess impact of new noise and or vibration generating development.	Only relevant to certain sites. Standard. No additional costs.
DM Policy 27	Lighting	Protect surrounding area from light pollution and nuisance. Sensitive, energy efficient lighting where possible. Consideration of hours of use.	Standard. No additional costs.
DM Policy 28	Contaminated land	Ensure contaminated land is fully investigated and remediated. Submission of a preliminary risk assessment, remediation plan and verification report.	Only relevant to some specific sites. Should be taken into account as part of the land price.
DM Policy 29	Car parking	Provision of car parking in accordance with core strategy policy 14. Limited car parking only acceptable in certain circumstances. Electric car charging points required to be provided in line with London Plan	Standard. No additional costs.
DM Policy 30	Urban design and local character	All development proposals to obtain a high standard of design. Sets out detailed matters to be addressed by schemes.	Standard. No additional costs.
DM Policy 31	Alterations and extensions to existing buildings including residential extensions	Sets out requirements for alterations and extensions. New rooms provided by extensions required to meet the space standards in DM Policy 32.	Standard. No additional costs.

Policy Number	Policy Name	Summary of Requirement	Cost Analysis
DM Policy 32	Housing design, layout and space standards	Attractive, functional and accessible providing external space, children's play space, and be safe and secure. Meet the London Plan space standards. Should be dual aspect. Family units should have a separate dining and living room. Sufficient storage space.	Standard. No additional costs.
DM Policy 33	Development on infill sites, back land sites, back gardens and amenity areas	Only acceptable subject to certain criteria.	Restrictive policy which may need to change in light of recent policy changes. No additional costs.
DM Policy 34	Thames Policy Area and Deptford Creekside	New development to improve the relationship of the River Thames with the local context including maintaining views or physical links, provide a mix of uses and public uses on ground floor, encourage river related uses, maintain and enhance the river or creek corridor and maintain the stability of the flood defences and examine opportunities to retreat flood defences .	Only relevant to certain sites. Costs dependent on site specific opportunities and constraints.
DM Policy 35	Public realm	Well designed, generously sized public realm using high quality material and provision of trees where possible. In Conservation Areas ensure that street furniture and paving is compatible with the character of the area.	Standard policy requirement.
DM Policy 36	New development, changes of use and alterations affecting designated heritage assets and their setting: conservation areas, listed buildings, schedule of ancient monuments and registered parks and gardens	Requires a statement on the significance of the asset and the impact of the development. Encourages adaption of historic buildings to be more energy efficient. Will only grant planning permission in Conservation Areas in certain circumstances. Will only grant consent for alterations and extensions to Listed Buildings which relate sensitively to the building's significance and sustain and enhance its significance and integrity.	Costs dependent on mitigation required. Only relevant to certain developments.
DM Policy 37	Non designated heritage assets including locally listed buildings, areas of special local character and areas of archaeological interest	Protect the local distinctiveness of the borough. Requires heritage reports for non-designated heritage assets. Retain and enhance locally listed buildings and resist demolition. Resist demolition of unlisted buildings in areas of special local character.	Only relevant to certain developments.

Policy Number	Policy Name	Summary of Requirement	Cost Analysis
DM Policy 38	Demolition or substantial harm to designated and non-designated heritage assets	Applications refused for demolition or harm to designated heritage assets unless proven necessary to achieve substantial public benefit that outweighs the harm or loss. Where demolition is proposed on the grounds that a building's condition is beyond repair, a structural survey is required.	Only relevant to certain developments.
DM Policy 39	Domestic satellite dishes and telecommunications equipment and Radio and telecommunications masts and infrastructure	Consider design and siting.	Normally no additional cost and only relevant to certain schemes.
DM Policy 40	Public conveniences	Expect new developments which attract large numbers of visitors/customers to make adequate provision for public conveniences, which are well located and signed in relation to pedestrian flows, car parks, public transport and other public places and are accessible for all.	Normally no additional cost and only relevant to certain schemes.
DM Policy 41	Innovative community facility provision	Encourages, where appropriate, the use of innovative solutions to the provision of community meeting space including in schools or unused buildings	No additional costs.
DM Policy 42	Nurseries and childcare	Consider loss of existing use, accessibility, traffic congestion, noise impacts and outdoor space provision	N/A
DM Policy 43	Art, culture and entertainment facilities	Encourages new or extended art, culture and entertainment uses where there is no unacceptable impact on local amenity. Protecting existing uses.	N/A
DM Policy 44	Places of worship	Sets out acceptable locations, high design quality, and consideration of noise and traffic impacts. Provision of a travel plan.	N/A

Appendix 2 - Sites details

1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16
LONDON BOROUGH OF LEWISHAM						Years 1 - 5		Years 6 - 10		Years 11 - 15					
Site ref	SITE NAME	Gross Site area	Net site area	Site coverage	Heights	No of Houses	No of Flats	No of Houses	No of Flats	No of Houses	No of Flats	Resi costs Houses	Resi costs Flats	GIA Houses	GIA flats
1	Very small residential	0.03	0.03	50%	2	1		-	-	-	-	1,619	1,782	108	-
2	Small residential developments (backland, infill etc)	0.05	0.05	60%	3	-	5	-	-	-	-	1,619	1,782	-	383
3	Small residential developments (backland, infill etc)	0.10	0.10	60%	6	-	11	-	-	-	-	1,619	1,782	-	873
4	Small residential developments	0.15	0.15	60%	6	-	25	-	-	-	-	1,619	1,914	-	1,978
5	Residential development	0.25	0.25	70%	6	-	50	-	-	-	-	1,619	1,914	-	4,170
6	Small scale mixed use, local centres	0.02	0.02	80%	3	-	5	-	-	-	-	1,619	1,782	-	383
7	Small scale mixed use, local centres	0.02	0.02	80%	3	-	5	-	-	-	-	1,619	1,782	-	383
8	Small mixed use	0.15	0.15	80%	6	-	25	-	-	-	-	1,619	1,914	-	1,978
9	Small mixed use	0.20	0.20	80%	6	-	30	-	-	-	-	1,619	1,914	-	2,468
10	Mixed use	0.30	0.30	80%	10	-	70	-	-	-	-	1,619	2,263	-	5,873
11	Mixed use	0.70	0.70	80%	14	-	150	-	-	-	-	1,619	2,263	-	11,930
12	Large mixed use (employment led)	0.80	0.80	80%	16	-	300	-	-	-	-	1,619	2,263	-	23,865
13	Town Centre	0.30	0.30	90%	20	-	200	-	-	-	-	1,619	2,263	-	15,910
14	Town Centre	1.00	1.00	90%	30	-	500	-	-	-	-	1,619	2,263	-	39,775
15	Town Centre	1.00	1.00	90%	10	-	250	-	-	-	-	1,619	2,263	-	19,865
16	Estate regeneration (small)	0.20	0.20	80%	3	-	10	-	-	-	-	1,619	1,782	-	785
17	Estate regeneration (large)	4.00	4.00	80%	13	-	200	-	-	-	-	1,619	2,263	-	15,910
18	Student housing	0.30	0.30	90%	5	-	-	-	-	-	-	1,619	2,263	-	-
19	Hotels	0.20	0.20	90%	6	-	67	-	-	-	-	1,619	2,263	-	2,010
20	Office	0.60	0.60	90%	3	-	-	-	-	-	-	1,619	2,263	-	-
21	Storage	0.20	0.20	80%	2	-	-	-	-	-	-	1,619	2,263	-	-
22	Residential care home (7 units)	0.03	0.03	80%	3	-	7	-	-	-	-	1,619	1,782	-	-
23	Strategic site 1	0.77	0.77	80%	16	-	230	-	-	-	-	1,619	2,263	-	18,315
24	Strategic site 2	0.85	0.85	80%	16	-	250	-	-	-	-	1,619	2,263	-	19,865
25	Strategic site 3	1.68	1.68	80%	11	-	370	-	-	-	-	1,619	2,263	-	29,415
26	Strategic site 4	0.28	0.28	80%	30	-	242	-	-	-	-	1,619	2,263	-	19,250
27	Strategic site 5	1.14	1.14	80%	30	-	540	-	-	-	-	1,619	2,263	-	42,965
28	Strategic site 6	0.30	0.30	70%	30	-	180	-	-	-	-	1,619	2,263	-	14,315
29	Strategic site 7	0.60	0.60	70%	15	-	180	-	-	-	-	1,619	2,263	-	14,315

LONDON IFloor areas - proposed (sqm)

CIL (rate per sqm) - INCL MAYORAL CIL

Site ref	Note: B1 office includes B1(b)										Total resi units	Total resi FS	CIL (rate per sqm) - INCL MAYORAL CIL									
	Retail A1-A2	Retail S'Mark	B1 office	B2 industria	B8 storage	C1 Hotel	C2 resi inst	D1	D2				Retail A1-A2	Retail S'Mark	B1 office	B2 industria	B8 storage	C1 Hotel	C2 resi inst	D1	D2	Resi
1	-	-	-	-	-	-	-	-	-	-	1	108	220	220	100	90	90	220	260	£60	£60	260
2	-	-	-	-	-	-	-	-	-	-	5	383	220	220	100	90	90	220	260	£60	£60	260
3	-	-	-	-	-	-	-	-	-	-	11	873	220	220	100	90	90	220	260	£60	£60	260
4	-	-	-	-	-	-	-	-	-	-	25	1,978	220	220	100	90	90	220	260	£60	£60	260
5	-	-	-	-	-	-	-	-	-	-	50	4,170	220	220	100	90	90	220	260	£60	£60	260
6	50	-	-	-	-	-	-	-	-	-	5	383	220	220	100	90	90	220	260	£60	£60	260
7	-	-	50	-	-	-	-	-	-	-	5	383	220	220	100	90	90	220	260	£60	£60	260
8	200	-	-	-	-	-	-	-	-	-	25	1,978	220	220	100	90	90	220	260	£60	£60	260
9	-	-	300	-	-	-	-	-	-	-	30	2,468	220	220	100	90	90	220	260	£60	£60	260
10	100	-	700	-	-	-	-	-	-	-	70	5,873	220	220	100	90	90	220	260	£60	£60	260
11	100	-	700	-	-	-	-	200	-	-	150	11,930	220	220	100	90	90	220	260	£60	£60	260
12	300	-	4,500	-	-	-	-	200	-	-	300	23,865	220	220	100	90	90	220	260	£60	£60	260
13	200	-	500	-	-	-	-	-	100	-	200	15,910	220	220	100	90	90	220	260	£60	£60	260
14	1,000	-	2,500	-	-	-	-	250	250	-	500	39,775	220	220	100	90	90	220	260	£60	£60	260
15	500	-	500	-	-	-	-	500	-	-	250	19,865	220	220	100	90	90	220	260	£60	£60	260
16	-	-	-	-	-	-	-	-	-	-	10	785	220	220	100	90	90	220	260	£60	£60	260
17	100	-	-	-	-	-	-	250	-	-	200	15,910	220	220	100	90	90	220	260	£60	£60	260
18	150	-	400	-	-	-	-	-	-	-	-	-	220	220	100	90	90	220	260	£60	£60	260
19	250	-	-	-	-	-	2,000	-	-	-	67	2,010	220	220	100	90	90	220	260	£60	£60	260
20	-	-	500	-	-	-	-	-	-	-	-	-	220	220	100	90	90	220	260	£60	£60	260
21	-	-	1,000	-	-	1,500	-	-	-	-	-	-	220	220	100	90	90	220	260	£60	£60	260
22	-	-	-	-	-	-	250	-	-	-	7	-	220	220	100	90	90	220	260	£60	£60	260
23	200	-	1,600	-	-	-	-	200	-	-	230	18,315	220	220	100	90	90	220	260	£60	£60	260
24	300	-	3,000	-	400	-	-	300	-	-	250	19,865	220	220	100	90	90	220	260	£60	£60	260
25	6,700	-	-	-	-	-	-	300	1,650	-	370	29,415	220	220	100	90	90	220	260	£60	£60	260
26	500	-	200	-	-	-	-	200	-	-	242	19,250	220	220	100	90	90	220	260	£60	£60	260
27	3,000	-	500	-	-	-	-	250	250	-	540	42,965	220	220	100	90	90	220	260	£60	£60	260
28	250	-	-	-	-	-	-	-	-	-	180	14,315	220	220	100	90	90	220	260	£60	£60	260
29	-	-	250	-	-	-	-	-	-	-	180	14,315	220	220	100	90	90	220	260	£60	£60	260

1	48	49	50	51	52	53	54	55	56	57	58	59	60	61	62	63	64	65	66	67	68	69	70	71	
LONDON I		S106 (per sqm for commercial; per unit for resi)											Rents							Cap val			Yields		
Site ref	E&T cost	Retail A1-A	Retail S'Ma	B1 office	B2 industri	B8 storage	C1 Hotel	C2 resi ins	D1	D2	Resi	Retail A1-A	Retail S'Ma	B1 office	B2 industri	B8 storage	C1 Hotel	C2 resi ins	D1	D2	Resi	Retail A1-A	Retail S'Ma	B1 office	
1	-	0	0	0	0	0	0	0	0	0	0	325	250	375	160	160	425	450	250	250	7,750	5.00%	5.00%	6.00%	
2	-	0	0	0	0	0	0	0	0	0	0	325	250	375	160	160	425	450	250	250	7,750	5.00%	5.00%	6.00%	
3	-	0	0	0	0	0	0	0	0	0	1,500	325	250	375	160	160	425	450	250	250	7,750	5.00%	5.00%	6.00%	
4	-	0	0	0	0	0	0	0	0	0	1,500	325	250	375	160	160	425	450	250	250	7,750	5.00%	5.00%	6.00%	
5	-	0	0	0	0	0	0	0	0	0	1,500	325	250	375	160	160	425	450	250	250	7,750	5.00%	5.00%	6.00%	
6	-	20	20	20	20	20	20	20	20	20	1,500	325	250	375	160	160	425	450	250	250	7,750	5.00%	5.00%	6.00%	
7	-	20	20	20	20	20	20	20	20	20	1,500	325	250	375	160	160	425	450	250	250	7,750	5.00%	5.00%	6.00%	
8	-	20	20	20	20	20	20	20	20	20	1,500	325	250	375	160	160	425	450	250	250	7,750	5.00%	5.00%	6.00%	
9	-	20	20	20	20	20	20	20	20	20	1,500	325	250	375	160	160	425	450	250	250	7,750	5.00%	5.00%	6.00%	
10	-	20	20	20	20	20	20	20	20	20	1,500	325	250	375	160	160	425	450	250	250	7,750	5.00%	5.00%	6.00%	
11	-	20	20	20	20	20	20	20	20	20	1,500	325	250	375	160	160	425	450	250	250	7,750	5.00%	5.00%	6.00%	
12	-	20	20	20	20	20	20	20	20	20	1,500	325	250	375	160	160	425	450	250	250	7,750	5.00%	5.00%	6.00%	
13	-	20	20	20	20	20	20	20	20	20	1,500	325	250	375	160	160	425	450	250	250	7,750	5.00%	5.00%	6.00%	
14	-	20	20	20	20	20	20	20	20	20	1,500	325	250	375	160	160	425	450	250	250	7,750	5.00%	5.00%	6.00%	
15	-	20	20	20	20	20	20	20	20	20	1,500	325	250	375	160	160	425	450	250	250	7,750	5.00%	5.00%	6.00%	
16	-	0	0	0	0	0	0	0	0	0	1,500	325	250	375	160	160	425	450	250	250	7,750	5.00%	5.00%	6.00%	
17	-	20	20	20	20	20	20	20	20	20	1,500	325	250	375	160	160	425	450	250	250	7,750	5.00%	5.00%	6.00%	
18	-	20	20	20	20	20	20	20	20	20	1,500	325	250	375	160	160	425	450	250	250	7,750	5.00%	5.00%	6.00%	
19	-	20	20	20	20	20	20	20	20	20	0	325	250	375	160	160	425	450	250	250	7,750	5.00%	5.00%	6.00%	
20	-	20	20	20	20	20	20	20	20	20	0	325	250	375	160	160	425	450	250	250	7,750	5.00%	5.00%	6.00%	
21	-	20	20	20	20	20	20	20	20	20	0	325	250	375	160	160	425	450	250	250	7,750	5.00%	5.00%	6.00%	
22	-	0	0	0	0	0	0	0	0	0	1,500	325	250	375	160	160	425	450	250	250	7,750	5.00%	5.00%	6.00%	
23	-	20	20	20	20	20	20	20	20	20	1,500	325	250	375	160	160	425	450	250	250	7,750	5.00%	5.00%	6.00%	
24	-	20	20	20	20	20	20	20	20	20	1,500	325	250	375	160	160	425	450	250	250	7,750	5.00%	5.00%	6.00%	
25	-	20	20	20	20	20	20	20	20	20	1,500	325	250	375	160	160	425	450	250	250	7,750	5.00%	5.00%	6.00%	
26	-	20	20	20	20	20	20	20	20	20	1,500	325	250	375	160	160	425	450	250	250	7,750	5.00%	5.00%	6.00%	
27	-	20	20	20	20	20	20	20	20	20	1,500	325	250	375	160	160	425	450	250	250	7,750	5.00%	5.00%	6.00%	
28	-	20	20	20	20	20	20	20	20	20	1,500	325	250	375	160	160	425	450	250	250	7,750	5.00%	5.00%	6.00%	
29	-	20	20	20	20	20	20	20	20	20	1,500	325	250	375	160	160	425	450	250	250	7,750	5.00%	5.00%	6.00%	

LONDON I								Build costs								Net to gross							
Site ref	B2 industri	B8 storage	C1 Hotel	C2 resi ins	D1	D2	Resi	Retail A1-A5	Retail S'Ma	B1 office	B2 industri	B8 storage	C1 Hotel	C2 resi ins	D1	D2	NOT USED	Retail A1-A5	Retail S'Ma	B1 office	B2 industrial	B8 storage	C1 Hotel
1	6.00%	6.00%	5.00%	6.00%	7.00%	7.00%		1,585	1,850	2,123	1,228	1,163	2,391	2,391	2,670	2,641		85%	85%	85%	85%	85%	85%
2	6.00%	6.00%	5.00%	6.00%	7.00%	7.00%		1,585	1,850	2,123	1,228	1,163	2,391	2,391	2,670	2,641		85%	85%	85%	85%	85%	85%
3	6.00%	6.00%	5.00%	6.00%	7.00%	7.00%		1,585	1,850	2,123	1,228	1,163	2,391	2,391	2,670	2,641		85%	85%	85%	85%	85%	85%
4	6.00%	6.00%	5.00%	6.00%	7.00%	7.00%		1,585	1,850	2,123	1,228	1,163	2,391	2,391	2,670	2,641		85%	85%	85%	85%	85%	85%
5	6.00%	6.00%	5.00%	6.00%	7.00%	7.00%		1,585	1,850	2,123	1,228	1,163	2,391	2,391	2,670	2,641		85%	85%	85%	85%	85%	85%
6	6.00%	6.00%	5.00%	6.00%	7.00%	7.00%		1,585	1,850	2,123	1,228	1,163	2,391	2,391	2,670	2,641		85%	85%	85%	85%	85%	85%
7	6.00%	6.00%	5.00%	6.00%	7.00%	7.00%		1,585	1,850	2,123	1,228	1,163	2,391	2,391	2,670	2,641		85%	85%	85%	85%	85%	85%
8	6.00%	6.00%	5.00%	6.00%	7.00%	7.00%		1,585	1,850	2,123	1,228	1,163	2,391	2,391	2,670	2,641		85%	85%	85%	85%	85%	85%
9	6.00%	6.00%	5.00%	6.00%	7.00%	7.00%		1,585	1,850	2,123	1,228	1,163	2,391	2,391	2,670	2,641		85%	85%	85%	85%	85%	85%
10	6.00%	6.00%	5.00%	6.00%	7.00%	7.00%		1,585	1,850	2,123	1,228	1,163	2,391	2,391	2,670	2,641		85%	85%	85%	85%	85%	85%
11	6.00%	6.00%	5.00%	6.00%	7.00%	7.00%		1,585	1,850	2,123	1,228	1,163	2,391	2,391	2,670	2,641		85%	85%	85%	85%	85%	85%
12	6.00%	6.00%	5.00%	6.00%	7.00%	7.00%		1,585	1,850	2,123	1,228	1,163	2,391	2,391	2,670	2,641		85%	85%	85%	85%	85%	85%
13	6.00%	6.00%	5.00%	6.00%	7.00%	7.00%		1,585	1,850	2,123	1,228	1,163	2,391	2,391	2,670	2,641		85%	85%	85%	85%	85%	85%
14	6.00%	6.00%	5.00%	6.00%	7.00%	7.00%		1,585	1,850	2,123	1,228	1,163	2,391	2,391	2,670	2,641		85%	85%	85%	85%	85%	85%
15	6.00%	6.00%	5.00%	6.00%	7.00%	7.00%		1,585	1,850	2,123	1,228	1,163	2,391	2,391	2,670	2,641		85%	85%	85%	85%	85%	85%
16	6.00%	6.00%	5.00%	6.00%	7.00%	7.00%		1,585	1,850	2,123	1,228	1,163	2,391	2,391	2,670	2,641		85%	85%	85%	85%	85%	85%
17	6.00%	6.00%	5.00%	6.00%	7.00%	7.00%		1,585	1,850	2,123	1,228	1,163	2,391	2,391	2,670	2,641		85%	85%	85%	85%	85%	85%
18	6.00%	6.00%	5.00%	6.00%	7.00%	7.00%		1,585	1,850	2,123	1,228	1,163	2,391	2,391	2,670	2,641		85%	85%	85%	85%	85%	85%
19	6.00%	6.00%	5.00%	6.00%	7.00%	7.00%		1,585	1,850	2,123	1,228	1,163	2,391	2,391	2,670	2,641		85%	85%	85%	85%	85%	85%
20	6.00%	6.00%	5.00%	6.00%	7.00%	7.00%		1,585	1,850	2,123	1,228	1,163	2,391	2,391	2,670	2,641		85%	85%	85%	85%	85%	85%
21	6.00%	6.00%	5.00%	6.00%	7.00%	7.00%		1,585	1,850	2,123	1,228	1,163	2,391	2,391	2,670	2,641		85%	85%	85%	85%	85%	85%
22	6.00%	6.00%	5.00%	6.00%	7.00%	7.00%		1,585	1,850	2,123	1,228	1,163	2,391	2,391	2,670	2,641		85%	85%	85%	85%	85%	85%
23	6.00%	6.00%	5.00%	6.00%	7.00%	7.00%		1,585	1,850	2,123	1,228	1,163	2,391	2,391	2,670	2,641		85%	85%	85%	85%	85%	85%
24	6.00%	6.00%	5.00%	6.00%	7.00%	7.00%		1,585	1,850	2,123	1,228	1,163	2,391	2,391	2,670	2,641		85%	85%	85%	85%	85%	85%
25	6.00%	6.00%	5.00%	6.00%	7.00%	7.00%		1,585	1,850	2,123	1,228	1,163	2,391	2,391	2,670	2,641		85%	85%	85%	85%	85%	85%
26	6.00%	6.00%	5.00%	6.00%	7.00%	7.00%		1,585	1,850	2,123	1,228	1,163	2,391	2,391	2,670	2,641		85%	85%	85%	85%	85%	85%
27	6.00%	6.00%	5.00%	6.00%	7.00%	7.00%		1,585	1,850	2,123	1,228	1,163	2,391	2,391	2,670	2,641		85%	85%	85%	85%	85%	85%
28	6.00%	6.00%	5.00%	6.00%	7.00%	7.00%		1,585	1,850	2,123	1,228	1,163	2,391	2,391	2,670	2,641		85%	85%	85%	85%	85%	85%
29	6.00%	6.00%	5.00%	6.00%	7.00%	7.00%		1,585	1,850	2,123	1,228	1,163	2,391	2,391	2,670	2,641		85%	85%	85%	85%	85%	85%

1	95	96	97	98	120	121	122	123	124	125	126	127	128	129	130	131	132	133	134	135	136	137
LONDON I							Build start (QUARTERS)							Build period (QUARTERS)								
Site ref	C2 resi ins	D1	D2	Resi	Total new floorspace	Highways/S278	Retail A1-A	Retail S'Ma	B1 office	B2 industri	B8 storage	C1 Hotel	C2 resi ins	D1	D2	Resi	Retail A1-A	Retail S'Ma	B1 office	B2 industri	B8 storage	C1 Hotel
1	85%	85%	85%	100%	108	-	2	2	2	2	2	2	2	2	2	2	4	4	4	4	4	4
2	85%	85%	85%	85%	383	-	2	2	2	2	2	2	2	2	2	2	5	5	5	5	5	5
3	85%	85%	85%	85%	873	11,000	2	2	2	2	2	2	2	2	2	2	6	6	6	6	6	6
4	85%	85%	85%	85%	1,978	25,000	2	2	2	2	2	2	2	2	2	2	8	8	8	8	8	8
5	85%	85%	85%	85%	4,170	50,000	2	2	2	2	2	2	2	2	2	2	8	8	8	8	8	8
6	85%	85%	85%	85%	433	5,750	2	2	2	2	2	2	2	2	2	2	5	5	5	5	5	5
7	85%	85%	85%	85%	433	5,750	2	2	2	2	2	2	2	2	2	2	5	5	5	5	5	5
8	85%	85%	85%	85%	2,178	28,000	2	2	2	2	2	2	2	2	2	2	8	8	8	8	8	8
9	85%	85%	85%	85%	2,768	34,500	2	2	2	2	2	2	2	2	2	2	8	8	8	8	8	8
10	85%	85%	85%	80%	6,673	82,000	2	2	2	2	2	2	2	2	2	2	8	8	8	8	8	8
11	85%	85%	85%	80%	12,930	165,000	2	2	2	2	2	2	2	2	2	2	8	8	8	8	8	8
12	85%	85%	85%	80%	28,865	375,000	2	2	2	2	2	2	2	2	2	2	12	12	12	12	12	12
13	85%	85%	85%	78%	16,710	212,000	2	2	2	2	2	2	2	2	2	2	10	10	10	10	10	10
14	85%	85%	85%	75%	43,775	560,000	2	2	2	2	2	2	2	2	2	2	14	14	14	14	14	14
15	85%	85%	85%	80%	21,365	272,500	2	2	2	2	2	2	2	2	2	2	10	10	10	10	10	10
16	85%	85%	85%	85%	785	10,000	2	2	2	2	2	2	2	2	2	2	5	5	5	5	5	5
17	85%	85%	85%	78%	16,260	205,250	2	2	2	2	2	2	2	2	2	2	10	10	10	10	10	10
18	85%	85%	85%	85%	3,550	53,250	2	2	2	2	2	2	2	2	2	2	8	8	8	8	8	8
19	85%	85%	85%	85%	4,260	33,750	2	2	2	2	2	2	2	2	2	2	8	8	8	8	8	8
20	85%	85%	85%	85%	500	7,500	2	2	2	2	2	2	2	2	2	2	8	8	8	8	8	8
21	85%	85%	85%	85%	2,500	37,500	2	2	2	2	2	2	2	2	2	2	4	4	4	4	4	4
22	85%	85%	85%	85%	250	7,000	2	2	2	2	2	2	2	2	2	2	5	5	5	5	5	5
23	85%	85%	85%	80%	20,315	260,000	2	2	2	2	2	2	2	2	2	2	8	8	8	8	8	8
24	85%	85%	85%	80%	23,865	310,000	2	2	2	2	2	2	2	2	2	2	10	10	10	10	10	10
25	85%	85%	85%	80%	38,065	499,750	2	2	2	2	2	2	2	2	2	2	10	10	10	10	10	10
26	85%	85%	85%	75%	20,150	255,500	2	2	2	2	2	2	2	2	2	2	10	10	10	10	10	10
27	85%	85%	85%	75%	46,965	600,000	2	2	2	2	2	2	2	2	2	2	14	14	14	14	14	14
28	85%	85%	85%	75%	14,565	183,750	2	2	2	2	2	2	2	2	2	2	8	8	8	8	8	8
29	85%	85%	85%	78%	14,565	183,750	2	2	2	2	2	2	2	2	2	2	8	8	8	8	8	8

1	138	139	140	141	142	143	144	145	146	147	148	149	150	151	152	153	154	155	156	157
LONDON I				Investment sale (QUARTERS)										Resi sales period (qtrs)		Sales period start		Area	On-site AH	% AH rented
Site ref	C2 resi ins	D1	D2	Resi	Retail A1-	Retail S/M	B1 office	B2 industri	B8 storage	C1 Hotel	C2 resi ins	D1	D2	Resi	Resi	Resi	% of PRS units			
1	4	4	4	4	6	6	6	6	6	6	6	6	6	6	1	6	0.00%		20%	70%
2	5	5	5	5	7	7	7	7	7	7	7	7	7	7	1	7	0.00%		20%	70%
3	6	6	6	6	8	8	8	8	8	8	8	8	8	8	1	8	0.00%		20%	70%
4	8	8	8	8	10	10	10	10	10	10	10	10	10	10	1	10	0.00%		20%	70%
5	8	8	8	8	10	10	10	10	10	10	10	10	10	10	2	10	0.00%		20%	70%
6	5	5	5	5	7	7	7	7	7	7	7	7	7	7	1	7	0.00%		20%	70%
7	5	5	5	5	7	7	7	7	7	7	7	7	7	7	1	7	0.00%		20%	70%
8	8	8	8	8	10	10	10	10	10	10	10	10	10	10	1	10	0.00%		20%	70%
9	8	8	8	8	10	10	10	10	10	10	10	10	10	10	1	10	0.00%		20%	70%
10	8	8	8	8	10	10	10	10	10	10	10	10	10	10	3	10	0.00%		20%	70%
11	8	8	8	8	10	10	10	10	10	10	10	10	10	10	4	10	0.00%		20%	70%
12	12	12	12	10	14	14	14	14	14	14	14	14	14	14	6	14	0.00%		20%	70%
13	10	10	10	10	12	12	12	12	12	12	12	12	12	12	5	12	0.00%		20%	70%
14	14	14	14	10	16	16	16	16	16	16	16	16	16	16	8	16	0.00%		20%	70%
15	10	10	10	8	12	12	12	12	12	12	12	12	12	12	5	12	0.00%		20%	70%
16	5	5	5	5	7	7	7	7	7	7	7	7	7	7	1	7	0.00%		20%	70%
17	10	10	10	10	12	12	12	12	12	12	12	12	12	12	5	12	0.00%		20%	70%
18	8	8	8	8	10	10	10	10	10	10	10	10	10	10	4	10	0.00%		0%	70%
19	8	8	8	8	10	10	10	10	10	10	10	10	10	10	2	10	0.00%		20%	70%
20	8	8	8	8	10	10	10	10	10	10	10	10	10	10	1	10	0.00%		0%	70%
21	4	4	4	4	6	6	6	6	6	6	6	6	6	6	1	6	0.00%		0%	70%
22	5	5	5	5	7	7	7	7	7	7	7	7	7	7	1	7	0.00%		20%	70%
23	8	8	8	8	10	10	10	10	10	10	10	10	10	10	5	10	0.00%		20%	70%
24	10	10	10	10	12	12	12	12	12	12	12	12	12	12	5	12	0.00%		20%	70%
25	10	10	10	10	12	12	12	12	12	12	12	12	12	12	6	12	0.00%		20%	70%
26	10	10	10	10	12	12	12	12	12	12	12	12	12	12	5	12	0.00%		20%	70%
27	14	14	14	14	16	16	16	16	16	16	16	16	16	16	8	16	0.00%		20%	70%
28	8	8	8	8	10	10	10	10	10	10	10	10	10	10	5	10	0.00%		20%	70%
29	8	8	8	8	10	10	10	10	10	10	10	10	10	10	5	6	0.00%		20%	70%

Appendix 3 - Appraisal results with growth

Maximum CIL rates (before buffer), using £3 million per hectare benchmark land value – Higher value zone – with growth

£7,750 per sqm / £720 per sqft

		Affordable housing percentage and maximum CIL rates per sqm								
	Resi units	0%	10%	20%	30%	35%	40%	50%		
1	Very small residential	1	£ 2,600	£ 2,217	£ 1,834	£ 1,451	£ 1,260	£ 1,068	£ 685	
2	Small residential developments (backland, infill etc)	5	£ 1,968	£ 1,653	£ 1,338	£ 1,022	£ 865	£ 707	£ 392	
3	Small residential developments (backland, infill etc)	11	£ 1,943	£ 1,634	£ 1,325	£ 1,015	£ 861	£ 706	£ 397	
4	Small residential developments	25	£ 1,798	£ 1,501	£ 1,204	£ 907	£ 759	£ 610	£ 313	
5	Residential development	50	£ 1,813	£ 1,520	£ 1,227	£ 933	£ 787	£ 640	£ 347	
6	Small scale mixed use, local centres	5	£ 2,093	£ 1,814	£ 1,535	£ 1,256	£ 1,117	£ 977	£ 698	
7	Small scale mixed use, local centres	5	£ 2,010	£ 1,732	£ 1,453	£ 1,174	£ 1,034	£ 895	£ 616	
8	Small mixed use	25	£ 1,707	£ 1,438	£ 1,168	£ 898	£ 764	£ 629	£ 359	
9	Small mixed use	30	£ 1,600	£ 1,336	£ 1,071	£ 806	£ 674	£ 542	£ 277	
10	Mixed use	70	£ 966	£ 727	£ 489	£ 250	£ 131	£ 11	£ -	
11	Mixed use	150	£ 904	£ 657	£ 410	£ 163	£ 39	£ -	£ -	
12	Large mixed use (employment led)	300	£ 699	£ 504	£ 308	£ 111	£ 13	£ -	£ -	
13	Tow n Centre	200	£ 850	£ 618	£ 385	£ 151	£ 34	£ -	£ -	
14	Tow n Centre	500	£ 385	£ 199	£ 13	£ -	£ -	£ -	£ -	
15	Tow n Centre	250	£ 776	£ 544	£ 310	£ 76	£ -	£ -	£ -	
16	Estate regeneration (small)	10	£ 1,401	£ 1,086	£ 771	£ 456	£ 298	£ 140	£ -	
17	Estate regeneration (large)	200	£ -	£ -	£ -	£ -	£ -	£ -	£ -	
18	Student housing	120	£ 95	£ 95	£ 95	£ 95	£ 95	£ 95	£ 95	
19	Hotels	67	£ 1,120	£ 982	£ 843	£ 705	£ 636	£ 566	£ 428	
20	Office	-	£ -	£ -	£ -	£ -	£ -	£ -	£ -	
21	Storage	-	£ -	£ -	£ -	£ -	£ -	£ -	£ -	
22	Residential care home (7 units)	7	£ 107	£ 106	£ 105	£ 104	£ 103	£ 102	£ 101	
23	Strategic site 1	230	£ 930	£ 694	£ 456	£ 218	£ 99	£ -	£ -	
24	Strategic site 2	250	£ 789	£ 580	£ 369	£ 158	£ 53	£ -	£ -	
25	Strategic site 3	370	£ 727	£ 536	£ 344	£ 151	£ 54	£ -	£ -	
26	Strategic site 4	242	£ 743	£ 517	£ 291	£ 65	£ -	£ -	£ -	
27	Strategic site 5	540	£ 491	£ 301	£ 110	£ -	£ -	£ -	£ -	
28	Strategic site 6	180	£ 824	£ 582	£ 340	£ 98	£ -	£ -	£ -	
29	Strategic site 7	181	£ 1,120	£ 846	£ 571	£ 294	£ 156	£ 18	£ -	

Maximum CIL rates (before buffer), using £3 million per hectare benchmark land value – lower value zone – with growth

£7,000 per sqm / £650 per sqft		Affordable housing percentage and maximum CIL rates per sqm								
	Resi units	0%	10%	20%	30%	35%	40%	50%		
1	Very small residential	1	£ 2,050	£ 1,722	£ 1,394	£ 1,066	£ 902	£ 738	£ 410	
2	Small residential developments (backland, infill etc)	5	£ 1,515	£ 1,245	£ 975	£ 705	£ 570	£ 435	£ 165	
3	Small residential developments (backland, infill etc)	11	£ 1,497	£ 1,232	£ 968	£ 703	£ 571	£ 439	£ 174	
4	Small residential developments	25	£ 1,366	£ 1,113	£ 859	£ 605	£ 478	£ 351	£ 97	
5	Residential development	50	£ 1,385	£ 1,135	£ 884	£ 634	£ 509	£ 383	£ 133	
6	Small scale mixed use, local centres	5	£ 1,692	£ 1,453	£ 1,214	£ 976	£ 856	£ 737	£ 498	
7	Small scale mixed use, local centres	5	£ 1,610	£ 1,371	£ 1,132	£ 893	£ 774	£ 655	£ 416	
8	Small mixed use	25	£ 1,316	£ 1,085	£ 855	£ 624	£ 509	£ 394	£ 163	
9	Small mixed use	30	£ 1,216	£ 990	£ 763	£ 537	£ 424	£ 311	£ 85	
10	Mixed use	70	£ 617	£ 413	£ 210	£ 6	£ -	£ -	£ -	
11	Mixed use	150	£ 541	£ 331	£ 120	£ -	£ -	£ -	£ -	
12	Large mixed use (employment led)	300	£ 403	£ 236	£ 69	£ -	£ -	£ -	£ -	
13	Tow n Centre	200	£ 505	£ 306	£ 107	£ -	£ -	£ -	£ -	
14	Tow n Centre	500	£ 95	£ -	£ -	£ -	£ -	£ -	£ -	
15	Tow n Centre	250	£ 427	£ 229	£ 30	£ -	£ -	£ -	£ -	
16	Estate regeneration (small)	10	£ 948	£ 678	£ 408	£ 138	£ 3	£ -	£ -	
17	Estate regeneration (large)	200	£ -	£ -	£ -	£ -	£ -	£ -	£ -	
18	Student housing	120	£ 137	£ 137	£ 137	£ 137	£ 137	£ 137	£ 137	
19	Hotels	67	£ 920	£ 801	£ 682	£ 564	£ 505	£ 445	£ 327	
20	Office	-	£ -	£ -	£ -	£ -	£ -	£ -	£ -	
21	Storage	-	£ -	£ -	£ -	£ -	£ -	£ -	£ -	
22	Residential care home (7 units)	7	£ 157	£ 156	£ 155	£ 154	£ 154	£ 153	£ 152	
23	Strategic site 1	230	£ 582	£ 379	£ 175	£ -	£ -	£ -	£ -	
24	Strategic site 2	250	£ 478	£ 298	£ 118	£ -	£ -	£ -	£ -	
25	Strategic site 3	370	£ 442	£ 278	£ 113	£ -	£ -	£ -	£ -	
26	Strategic site 4	242	£ 408	£ 216	£ 23	£ -	£ -	£ -	£ -	
27	Strategic site 5	540	£ 200	£ 38	£ -	£ -	£ -	£ -	£ -	
28	Strategic site 6	180	£ 468	£ 262	£ 55	£ -	£ -	£ -	£ -	
29	Strategic site 7	181								

Maximum CIL rates (before buffer), using £6 million per hectare benchmark land value – Higher value zone – with growth

£7,750 per sqm / £720 per sqft

		Affordable housing percentage and maximum CIL rates per sqm								
	Resi units	0%	10%	20%	30%	35%	40%	50%		
1	Very small residential	1	£ 1,763	£ 1,380	£ 997	£ 614	£ 423	£ 231	£ -	-
2	Small residential developments (backland, infill etc)	5	£ 1,576	£ 1,261	£ 945	£ 630	£ 472	£ 315	£ -	-
3	Small residential developments (backland, infill etc)	11	£ 1,599	£ 1,290	£ 981	£ 672	£ 517	£ 363	£ 53	53
4	Small residential developments	25	£ 1,570	£ 1,273	£ 976	£ 679	£ 531	£ 382	£ 86	86
5	Residential development	50	£ 1,633	£ 1,340	£ 1,047	£ 753	£ 607	£ 460	£ 167	167
6	Small scale mixed use, local centres	5	£ 1,954	£ 1,675	£ 1,396	£ 1,117	£ 978	£ 838	£ 560	560
7	Small scale mixed use, local centres	5	£ 1,872	£ 1,593	£ 1,314	£ 1,035	£ 896	£ 756	£ 477	477
8	Small mixed use	25	£ 1,501	£ 1,231	£ 961	£ 692	£ 557	£ 422	£ 152	152
9	Small mixed use	30	£ 1,384	£ 1,119	£ 854	£ 590	£ 457	£ 325	£ 60	60
10	Mixed use	70	£ 831	£ 593	£ 354	£ 115	£ -	£ -	£ -	-
11	Mixed use	150	£ 741	£ 495	£ 247	£ 0	£ -	£ -	£ -	-
12	Large mixed use (employment led)	300	£ 616	£ 421	£ 225	£ 28	£ -	£ -	£ -	-
13	Tow n Centre	200	£ 796	£ 564	£ 331	£ 97	£ -	£ -	£ -	-
14	Tow n Centre	500	£ 316	£ 131	£ -	£ -	£ -	£ -	£ -	-
15	Tow n Centre	250	£ 636	£ 404	£ 170	£ -	£ -	£ -	£ -	-
16	Estate regeneration (small)	10	£ 637	£ 322	£ 7	£ -	£ -	£ -	£ -	-
17	Estate regeneration (large)	200	£ -	£ -	£ -	£ -	£ -	£ -	£ -	-
18	Student housing	120	£ -	£ -	£ -	£ -	£ -	£ -	£ -	-
19	Hotels	67	£ 979	£ 841	£ 703	£ 564	£ 495	£ 426	£ 287	287
20	Office	-	£ -	£ -	£ -	£ -	£ -	£ -	£ -	-
21	Storage	-	£ -	£ -	£ -	£ -	£ -	£ -	£ -	-
22	Residential care home (7 units)	7	£ -	£ -	£ -	£ -	£ -	£ -	£ -	-
23	Strategic site 1	230	£ 816	£ 580	£ 343	£ 104	£ -	£ -	£ -	-
24	Strategic site 2	250	£ 683	£ 473	£ 263	£ 51	£ -	£ -	£ -	-
25	Strategic site 3	370	£ 595	£ 403	£ 211	£ 18	£ -	£ -	£ -	-
26	Strategic site 4	242	£ 701	£ 475	£ 250	£ 24	£ -	£ -	£ -	-
27	Strategic site 5	540	£ 418	£ 229	£ 37	£ -	£ -	£ -	£ -	-
28	Strategic site 6	180	£ 762	£ 521	£ 278	£ 36	£ -	£ -	£ -	-
29	Strategic site 7	181	£ 997	£ 723	£ 448	£ 171	£ 32	£ -	£ -	-

Maximum CIL rates (before buffer), using £6 million per hectare benchmark land value – Lower value zone – with growth

£7,000 per sqm / £650 per sqft

		Affordable housing percentage and maximum CIL rates per sqm								
	Resi units	0%	10%	20%	30%	35%	40%	50%		
1	Very small residential	1	£ 1,213	£ 885	£ 557	£ 229	£ 65	£ -	£ -	
2	Small residential developments (backland, infill etc)	5	£ 1,123	£ 853	£ 583	£ 313	£ 178	£ 43	£ -	
3	Small residential developments (backland, infill etc)	11	£ 1,153	£ 889	£ 624	£ 360	£ 227	£ 95	£ -	
4	Small residential developments	25	£ 1,139	£ 885	£ 631	£ 377	£ 251	£ 124	£ -	
5	Residential development	50	£ 1,205	£ 955	£ 704	£ 454	£ 329	£ 204	£ -	
6	Small scale mixed use, local centres	5	£ 1,553	£ 1,314	£ 1,076	£ 837	£ 717	£ 598	£ 359	
7	Small scale mixed use, local centres	5	£ 1,471	£ 1,232	£ 993	£ 755	£ 635	£ 516	£ 277	
8	Small mixed use	25	£ 1,109	£ 878	£ 648	£ 417	£ 302	£ 187	£ -	
9	Small mixed use	30	£ 999	£ 773	£ 547	£ 320	£ 207	£ 94	£ -	
10	Mixed use	70	£ 482	£ 279	£ 75	£ -	£ -	£ -	£ -	
11	Mixed use	150	£ 379	£ 168	£ -	£ -	£ -	£ -	£ -	
12	Large mixed use (employment led)	300	£ 320	£ 153	£ -	£ -	£ -	£ -	£ -	
13	Tow n Centre	200	£ 451	£ 252	£ 54	£ -	£ -	£ -	£ -	
14	Tow n Centre	500	£ 27	£ -	£ -	£ -	£ -	£ -	£ -	
15	Tow n Centre	250	£ 287	£ 88	£ -	£ -	£ -	£ -	£ -	
16	Estate regeneration (small)	10	£ 184	£ -	£ -	£ -	£ -	£ -	£ -	
17	Estate regeneration (large)	200	£ -	£ -	£ -	£ -	£ -	£ -	£ -	
18	Student housing	120	£ -	£ -	£ -	£ -	£ -	£ -	£ -	
19	Hotels	67	£ 779	£ 660	£ 542	£ 423	£ 364	£ 304	£ 186	
20	Office	-	£ -	£ -	£ -	£ -	£ -	£ -	£ -	
21	Storage	-	£ -	£ -	£ -	£ -	£ -	£ -	£ -	
22	Residential care home (7 units)	7	£ -	£ -	£ -	£ -	£ -	£ -	£ -	
23	Strategic site 1	230	£ 468	£ 265	£ 62	£ -	£ -	£ -	£ -	
24	Strategic site 2	250	£ 371	£ 191	£ 11	£ -	£ -	£ -	£ -	
25	Strategic site 3	370	£ 309	£ 146	£ -	£ -	£ -	£ -	£ -	
26	Strategic site 4	242	£ 366	£ 174	£ -	£ -	£ -	£ -	£ -	
27	Strategic site 5	540	£ 128	£ -	£ -	£ -	£ -	£ -	£ -	
28	Strategic site 6	180	£ 406	£ 200	£ -	£ -	£ -	£ -	£ -	
29	Strategic site 7	181	£ 606	£ 369	£ 132	£ -	£ -	£ -	£ -	

Maximum CIL rates (before buffer), using £9 million per hectare benchmark land value – Higher value zone – with growth

£7,750 per sqm / £720 per sqft

		Affordable housing percentage and maximum CIL rates per sqm								
	Resi units	0%	10%	20%	30%	35%	40%	50%		
1	Very small residential	1	£ 926	£ 543	£ 160	£ -	£ -	£ -	£ -	£ -
2	Small residential developments (backland, infill etc)	5	£ 1,184	£ 869	£ 553	£ 238	£ 80	£ -	£ -	£ -
3	Small residential developments (backland, infill etc)	11	£ 1,255	£ 946	£ 637	£ 328	£ 173	£ 19	£ -	£ -
4	Small residential developments	25	£ 1,343	£ 1,046	£ 749	£ 452	£ 303	£ 155	£ -	£ -
5	Residential development	50	£ 1,453	£ 1,160	£ 867	£ 574	£ 427	£ 280	£ -	£ -
6	Small scale mixed use, local centres	5	£ 1,815	£ 1,536	£ 1,257	£ 979	£ 839	£ 700	£ 421	£ -
7	Small scale mixed use, local centres	5	£ 1,733	£ 1,454	£ 1,175	£ 896	£ 757	£ 617	£ 339	£ -
8	Small mixed use	25	£ 1,294	£ 1,024	£ 755	£ 485	£ 350	£ 215	£ -	£ -
9	Small mixed use	30	£ 1,167	£ 902	£ 637	£ 373	£ 240	£ 108	£ -	£ -
10	Mixed use	70	£ 696	£ 458	£ 219	£ -	£ -	£ -	£ -	£ -
11	Mixed use	150	£ 579	£ 332	£ 85	£ -	£ -	£ -	£ -	£ -
12	Large mixed use (employment led)	300	£ 532	£ 337	£ 142	£ -	£ -	£ -	£ -	£ -
13	Tow n Centre	200	£ 742	£ 510	£ 277	£ 43	£ -	£ -	£ -	£ -
14	Tow n Centre	500	£ 248	£ 62	£ -	£ -	£ -	£ -	£ -	£ -
15	Tow n Centre	250	£ 496	£ 263	£ 29	£ -	£ -	£ -	£ -	£ -
16	Estate regeneration (small)	10	£ -	£ -	£ -	£ -	£ -	£ -	£ -	£ -
17	Estate regeneration (large)	200	£ -	£ -	£ -	£ -	£ -	£ -	£ -	£ -
18	Student housing	120	£ -	£ -	£ -	£ -	£ -	£ -	£ -	£ -
19	Hotels	67	£ 839	£ 700	£ 562	£ 423	£ 354	£ 285	£ 146	£ -
20	Office	-	£ -	£ -	£ -	£ -	£ -	£ -	£ -	£ -
21	Storage	-	£ -	£ -	£ -	£ -	£ -	£ -	£ -	£ -
22	Residential care home (7 units)	7	£ -	£ -	£ -	£ -	£ -	£ -	£ -	£ -
23	Strategic Site 1	230	£ 702	£ 466	£ 229	£ -	£ -	£ -	£ -	£ -
24	Strategic Site 2	250	£ 576	£ 366	£ 156	£ -	£ -	£ -	£ -	£ -
25	Strategic Site 3	370	£ 462	£ 271	£ 79	£ -	£ -	£ -	£ -	£ -
26	Strategic Site 4	242	£ 660	£ 434	£ 208	£ -	£ -	£ -	£ -	£ -
27	Strategic Site 5	540	£ 345	£ 156	£ -	£ -	£ -	£ -	£ -	£ -
28	Strategic Site 6	180	£ 700	£ 459	£ 216	£ -	£ -	£ -	£ -	£ -
29	Strategic Site 7	181	£ 873	£ 599	£ 324	£ 47	£ -	£ -	£ -	£ -

Maximum CIL rates (before buffer), using £9 million per hectare benchmark land value – Lower value zone – with growth

£7,000 per sqm / £650 per sqft

		Affordable housing percentage and maximum CIL rates per sqm								
	Resi units	0%	10%	20%	30%	35%	40%	50%		
1	Very small residential	1	£ 376	£ 48	£ -	£ -	£ -	£ -	£ -	
2	Small residential developments (backland, infill etc)	5	£ 731	£ 461	£ 191	£ -	£ -	£ -	£ -	
3	Small residential developments (backland, infill etc)	11	£ 809	£ 545	£ 280	£ 16	£ -	£ -	£ -	
4	Small residential developments	25	£ 911	£ 657	£ 404	£ 150	£ 23	£ -	£ -	
5	Residential development	50	£ 1,026	£ 775	£ 525	£ 274	£ 149	£ 24	£ -	
6	Small scale mixed use, local centres	5	£ 1,414	£ 1,176	£ 937	£ 698	£ 579	£ 459	£ 220	
7	Small scale mixed use, local centres	5	£ 1,332	£ 1,093	£ 855	£ 616	£ 496	£ 377	£ 138	
8	Small mixed use	25	£ 902	£ 672	£ 441	£ 211	£ 96	£ -	£ -	
9	Small mixed use	30	£ 782	£ 556	£ 330	£ 103	£ -	£ -	£ -	
10	Mixed use	70	£ 347	£ 144	£ -	£ -	£ -	£ -	£ -	
11	Mixed use	150	£ 217	£ 6	£ -	£ -	£ -	£ -	£ -	
12	Large mixed use (employment led)	300	£ 237	£ 70	£ -	£ -	£ -	£ -	£ -	
13	Tow n Centre	200	£ 397	£ 199	£ -	£ -	£ -	£ -	£ -	
14	Tow n Centre	500	£ -	£ -	£ -	£ -	£ -	£ -	£ -	
15	Tow n Centre	250	£ 147	£ -	£ -	£ -	£ -	£ -	£ -	
16	Estate regeneration (small)	10	£ -	£ -	£ -	£ -	£ -	£ -	£ -	
17	Estate regeneration (large)	200	£ -	£ -	£ -	£ -	£ -	£ -	£ -	
18	Student housing	120	£ -	£ -	£ -	£ -	£ -	£ -	£ -	
19	Hotels	67	£ 638	£ 519	£ 401	£ 282	£ 223	£ 164	£ 45	
20	Office	-	£ -	£ -	£ -	£ -	£ -	£ -	£ -	
21	Storage	-	£ -	£ -	£ -	£ -	£ -	£ -	£ -	
22	Residential care home (7 units)	7	£ -	£ -	£ -	£ -	£ -	£ -	£ -	
23	Strategic Site 1	230	£ 354	£ 151	£ -	£ -	£ -	£ -	£ -	
24	Strategic Site 2	250	£ 264	£ 85	£ -	£ -	£ -	£ -	£ -	
25	Strategic Site 3	370	£ 177	£ 13	£ -	£ -	£ -	£ -	£ -	
26	Strategic Site 4	242	£ 325	£ 132	£ -	£ -	£ -	£ -	£ -	
27	Strategic Site 5	540	£ 55	£ -	£ -	£ -	£ -	£ -	£ -	
28	Strategic Site 6	180	£ 345	£ 138	£ -	£ -	£ -	£ -	£ -	
29	Strategic Site 7	181	£ 483	£ 245	£ 8	£ -	£ -	£ -	£ -	

Maximum CIL rates (before buffer), using £12 million per hectare benchmark land value – Higher value zone – with growth

£7,750 per sqm / £720 per sqft

	Resi units	Residential sales values per square metre							
		0%	10%	20%	30%	35%	40%	50%	
1 Very small residential	1	£ 89	£ -	£ -	£ -	£ -	£ -	£ -	£ -
2 Small residential developments (backland, infill etc)	5	£ 792	£ 476	£ 161	£ -	£ -	£ -	£ -	£ -
3 Small residential developments (backland, infill etc)	11	£ 911	£ 602	£ 293	£ -	£ -	£ -	£ -	£ -
4 Small residential developments	25	£ 1,115	£ 818	£ 521	£ 224	£ 76	£ -	£ -	£ -
5 Residential development	50	£ 1,273	£ 980	£ 687	£ 394	£ 247	£ 100	£ -	£ -
6 Small scale mixed use, local centres	5	£ 1,676	£ 1,398	£ 1,119	£ 840	£ 700	£ 561	£ 282	£ -
7 Small scale mixed use, local centres	5	£ 1,594	£ 1,315	£ 1,036	£ 758	£ 618	£ 479	£ 200	£ -
8 Small mixed use	25	£ 1,087	£ 818	£ 548	£ 278	£ 144	£ 9	£ -	£ -
9 Small mixed use	30	£ 950	£ 685	£ 421	£ 156	£ 24	£ -	£ -	£ -
10 Mixed use	70	£ 561	£ 323	£ 84	£ -	£ -	£ -	£ -	£ -
11 Mixed use	150	£ 416	£ 170	£ -	£ -	£ -	£ -	£ -	£ -
12 Large mixed use (employment led)	300	£ 449	£ 254	£ 59	£ -	£ -	£ -	£ -	£ -
13 Town Centre	200	£ 688	£ 456	£ 223	£ -	£ -	£ -	£ -	£ -
14 Town Centre	500	£ 179	£ -	£ -	£ -	£ -	£ -	£ -	£ -
15 Town Centre	250	£ 355	£ 123	£ -	£ -	£ -	£ -	£ -	£ -
16 Estate regeneration (small)	10	£ -	£ -	£ -	£ -	£ -	£ -	£ -	£ -
17 Estate regeneration (large)	200	£ -	£ -	£ -	£ -	£ -	£ -	£ -	£ -
18 Student housing	120	£ -	£ -	£ -	£ -	£ -	£ -	£ -	£ -
19 Hotels	67	£ 698	£ 559	£ 421	£ 282	£ 213	£ 144	£ 5	£ -
20 Office	-	£ -	£ -	£ -	£ -	£ -	£ -	£ -	£ -
21 Storage	-	£ -	£ -	£ -	£ -	£ -	£ -	£ -	£ -
22 Residential care home (7 units)	7	£ -	£ -	£ -	£ -	£ -	£ -	£ -	£ -
23 Strategic Site 1	230	£ 589	£ 352	£ 115	£ -	£ -	£ -	£ -	£ -
24 Strategic Site 2	250	£ 469	£ 260	£ 49	£ -	£ -	£ -	£ -	£ -
25 Strategic Site 3	370	£ 330	£ 138	£ -	£ -	£ -	£ -	£ -	£ -
26 Strategic Site 4	242	£ 618	£ 392	£ 166	£ -	£ -	£ -	£ -	£ -
27 Strategic Site 5	540	£ 272	£ 83	£ -	£ -	£ -	£ -	£ -	£ -
28 Strategic Site 6	180	£ 638	£ 397	£ 155	£ -	£ -	£ -	£ -	£ -
29 Strategic Site 7	181	£ 750	£ 476	£ 200	£ -	£ -	£ -	£ -	£ -

Maximum CIL rates (before buffer), using £12 million per hectare benchmark land value – Lower value zone – with growth

£7,000 per sqm / £650 per sqft

		Resi units	Residential sales values per square metre							
			0%	10%	20%	30%	35%	40%	50%	
1	Very small residential	1	£ -	£ -	£ -	£ -	£ -	£ -	£ -	£ -
2	Small residential developments (backland, infill etc)	5	£ 339	£ 69	£ -	£ -	£ -	£ -	£ -	£ -
3	Small residential developments (backland, infill etc)	11	£ 465	£ 201	£ -	£ -	£ -	£ -	£ -	£ -
4	Small residential developments	25	£ 684	£ 430	£ 176	£ -	£ -	£ -	£ -	£ -
5	Residential development	50	£ 846	£ 595	£ 345	£ 94	£ -	£ -	£ -	£ -
6	Small scale mixed use, local centres	5	£ 1,276	£ 1,037	£ 798	£ 559	£ 440	£ 321	£ 82	
7	Small scale mixed use, local centres	5	£ 1,194	£ 955	£ 716	£ 477	£ 358	£ 238	£ -	
8	Small mixed use	25	£ 696	£ 465	£ 235	£ 4	£ -	£ -	£ -	£ -
9	Small mixed use	30	£ 565	£ 339	£ 113	£ -	£ -	£ -	£ -	£ -
10	Mixed use	70	£ 213	£ 9	£ -	£ -	£ -	£ -	£ -	£ -
11	Mixed use	150	£ 54	£ -	£ -	£ -	£ -	£ -	£ -	£ -
12	Large mixed use (employment led)	300	£ 153	£ -	£ -	£ -	£ -	£ -	£ -	£ -
13	Tow n Centre	200	£ 343	£ 145	£ -	£ -	£ -	£ -	£ -	£ -
14	Tow n Centre	500	£ -	£ -	£ -	£ -	£ -	£ -	£ -	£ -
15	Tow n Centre	250	£ 6	£ -	£ -	£ -	£ -	£ -	£ -	£ -
16	Estate regeneration (small)	10	£ -	£ -	£ -	£ -	£ -	£ -	£ -	£ -
17	Estate regeneration (large)	200	£ -	£ -	£ -	£ -	£ -	£ -	£ -	£ -
18	Student housing	120	£ -	£ -	£ -	£ -	£ -	£ -	£ -	£ -
19	Hotels	67	£ 497	£ 378	£ 260	£ 141	£ 82	£ 23	£ -	£ -
20	Office	-	£ -	£ -	£ -	£ -	£ -	£ -	£ -	£ -
21	Storage	-	£ -	£ -	£ -	£ -	£ -	£ -	£ -	£ -
22	Residential care home (7 units)	7	£ -	£ -	£ -	£ -	£ -	£ -	£ -	£ -
23	Strategic Site 1	230	£ 241	£ 37	£ -	£ -	£ -	£ -	£ -	£ -
24	Strategic Site 2	250	£ 158	£ -	£ -	£ -	£ -	£ -	£ -	£ -
25	Strategic Site 3	370	£ 44	£ -	£ -	£ -	£ -	£ -	£ -	£ -
26	Strategic Site 4	242	£ 283	£ 91	£ -	£ -	£ -	£ -	£ -	£ -
27	Strategic Site 5	540	£ -	£ -	£ -	£ -	£ -	£ -	£ -	£ -
28	Strategic Site 6	180	£ 283	£ 76	£ -	£ -	£ -	£ -	£ -	£ -
29	Strategic Site 7	181	£ 359	£ 122	£ -	£ -	£ -	£ -	£ -	£ -

Appendix 4 - Sample appraisal

LOCAL PLAN AND CIL VIABILITY MODEL

This is input source box for reference info that appears on all sheets

Local Authority	LONDON BOROUGH OF LEWISHAM
Area(s)	
Author	
Date	22 March 2018
Reference	

Site	4
	0.15

DO NOT CHANGE SITE USING THIS CELL - USE M3 IN "RESULTS" PAGE

Values: - NOT USED

Sales values	H
--------------	---

Affordable housing percentage	20%
of which social rented	70%
of which intermediate	30%

Sustainability

Cost allowance - all tenures (% of base costs)	7.4%
Cost uplift on commercial	2%
Green roofs	

Grant available check box

Residual Land Values	Total units	Total floor area GIA	Private floor area	Ave unit size	CIL as % of dev costs
£1,655,622	25	1,978	1,582	79	4.1%

Site area	0.15
Scheme above AH threshold	y

GIA per unit	Units years 1 - 5	Units years 6 - 10	Units years 11 - 15	GIA years 1 - 5	GIA years 6 - 10	GIA years 11 - 15	G to N flats	NiAs years 1 - 5	NiAs years 1 - 6	NiAs years 1 - 7	Totals
Houses	79	-	-	-	-	-	100%	-	-	-	-
Flats	79	25	-	-	1,978	-	85%	1,681	-	-	1,681
Totals		25	-	-	1,978	-		1,681	-	-	1,681

Private NiAs	1,345	-	-	1,345
PRS units	-	-	-	-
Affordable NiAs	336	-	-	336

Revenue	Years 1 - 5	Years 6 - 10	Years 11 - 15
Value perm	7000	7,000	7,000
Private GDV	9,412,900	-	-

PRS units to be sold at 85% of MV

Base costs	Per sqm	Years 1 - 5	Years 6 - 10	Years 11 - 15
Houses	1,619	1,619	1,619	1,619
Houses externals	15%	243	243	243
Flats	1,914	1,914	1,914	1,914
Flats externals	15%	287	287	287
Costs + externals		4,352,675	-	-

Growth/inflation	Year 1-5	Year 6-10	Year 11-15
Sales	0.00%	0.00%	0.00%
Build	0.00%	0.00%	0.00%

LOCAL PLAN AND CIL VIABILITY MODEL

Local Authority	LONDON BOROUGH OF LEWISHAM
Area(s)	0
Author	0
Date	22 March 2018
Reference	0

SALES AND AFFORDABLE HOUSING VALUES

VALUE BANDS for private sales

Sub Market	£ per sq metre
A Value 1	£6,250
B Value 1	£6,500
C Value 1	£6,750
D Value 1	£7,000
E Value 1	£7,250
F Value 1	£7,500
G Value 1	£7,750
H Value 1	£8,000
I Value 1	£8,250

GROUND RENTS from flats (£s per annum)

	Private	Affordable
Average	£300	£0
Capitalisation rate		4.50%

Investment value

	Private	Affordable
One bed	£6,667	£0
Two beds	£0	£0
Three beds	£0	£0
Four beds	£0	£0

Select affordable value option from drop down box Option 2: Capital values calculated from net rents & yields

AFFORDABLE HOUSING CAPITAL VALUES (price paid to developer)

Option 1 User defined capital values per unit

	Social rent			NBHB		
	Capitalised rent per unit	Indicative HCA funding per unit	Value per unit	Equity + rent	Indicative HCA funding per unit	Value per unit
One bed flats	£78,000	£0	£78,000			£0
Two bed flats	£95,000	£0	£95,000			£0
Three bed flats	£123,000	£0	£123,000			£0
Four bed flats	£132,000	£0	£132,000			£0
Two bed house	£95,000	£0	£95,000			£0
Three bed house	£123,000	£0	£123,000			£0
Four bed house	£132,000	£0	£132,000			£0

Per sqm	
Average Aff Rent value:	£1,749
Average Shd Own value:	£4,323
Blended value	£2,521.20 (Based on selection from 'Test Variables' sheet)

NOT USED

Option 2 Capital values for affordable housing calculated from net rents & yield assumption

	Social rent					NBHB									
	Net Target rent per annum	Yield	Capital value	Indicative unit funding	Value per unit	Average market value	% of equity sold	Value of equity sold	Rent (% of retained equity)	Rent per annum	Yield	Capital value of retained equity	Indicative HCA funding per unit	Value per unit	
One bed flats		6.50%	£0	£0	£0	£400,000		£0		£0	6.00%	£0	£0	£0	
Two bed flats		6.50%	£0	£0	£0	£584,000		£0		£0	6.00%	£0	£0	£0	
Three bed flats		6.50%	£0	£0	£0	£688,000		£0		£0	6.00%	£0	£0	£0	
Four bed flats		6.50%	£0	£0	£0	£720,000		£0		£0	6.00%	£0	£0	£0	
Two bed house		6.50%	£0	£0	£0	£664,000		£0		£0	6.00%	£0	£0	£0	
Three bed house		6.50%	£0	£0	£0	£768,000		£0		£0	6.00%	£0	£0	£0	
Four bed house		6.50%	£0	£0	£0	£904,000		£0		£0	6.00%	£0	£0	£0	

LOCAL PLAN AND CIL VIABILITY MODEL

Local Authority	LONDON BOROUGH OF LEWISHAM
Area(s)	0
Author	0
Date	22 March 2018
Reference	0

BUILD COSTS

TIMINGS *for cash flow*

PLANNING OBLIGATIONS / CIL

Typology	Build costs per gross sqm - HOUSES	Build costs per gross sq m - FLATS	External works and other costs	Gross to net adjustment for flats	Build start	Build period	Sales period	Sales period start	S106 payments		CIL Charges (incl Mayoral CIL)				Fees
					Quarters	Quarters	Quarters	Quarters from start on site	£s per sqm all tenures	Quarter paid	£s p sq m private sales only	Instal-ment 1 - Qtr paid	Instal-ment 2 - Qtr paid	Instal-ment 3 - Qtr paid	% of build cost
Residential	£1,619	£1,914	£287	85.0%	2	8	1	10	£1,500	3	£210	1	2	3	10%

NB externals included in base costs in 'sites page'

OTHER COSTS

Developer return % GDV	Private	18.00%
	Affordable	6.00%
Zero carbon	All tenures	7.4%
Contingency		5%
Marketing costs % of sales values		3.00%
Legal Fees % of GDV		0.50%
Site acquisition costs % land value		6.80%
Development Finance		6.00%

Highways/S278	£25,000	(Total for scheme)
Employment & training	£0	
Cat 2 accessibility:	Applies to all dwellings	Nos of units:
Houses	£521	-
Flats	£924	25
Cat 3 accessibility	Applies to 5% of affordable dwellings	
Houses	£22,694	-
Flats	£7,906	0

COMMERCIAL INPUTS

	Site 4								
Value	Retail A1-A5	Retail S'Market	B1 office	B2 industrial	B8 storage	C1 Hotel	C2 resi institutio	D1	D2
Rent per sq m	£325.00	£250.00	£375.00	£160.00	£160.00	£425.00	£450.00	£250.00	£250.00
Yield	5.00%	5.00%	6.00%	6.00%	6.00%	5.00%	6.00%	7.00%	7.00%
Rent free/void period (years)	1.0	0.50	1.00	1.00	1.00	1.00	1.00	1.00	1.00
Net floor area (sq m)	-	-	-	-	-	-	-	-	-
Purchaser's costs	5.80%	5.80%	5.80%	5.80%	5.80%	5.80%	5.80%	5.80%	5.80%

Disposal Costs

Letting Agent's fee (% of rent)	10.00%	10.00%	10.00%	10.00%	10.00%	10.00%	10.00%	10.00%	10.00%
Agent's fees (on capital value)	1.00%	1.00%	1.00%	1.00%	1.00%	1.00%	1.00%	1.00%	1.00%
Legal fees (% of capital value)	0.75%	0.75%	0.75%	0.75%	0.75%	0.75%	0.75%	0.75%	0.75%

Costs

Demolition costs	£50 psm								
Demolition area (sq m)									
Building costs	£1585 psm	£1850 psm	£2123 psm	£1228 psm	£1163 psm	£2391 psm	£2391 psm	£2670 psm	£2641 psm
Net to gross floor area	85.00%	85.00%	85.00%	85.00%	85.00%	85.00%	85.00%	85.00%	85.00%
External works	10.00%	10.00%	10.00%	10.00%	10.00%	10.00%	10.00%	10.00%	10.00%
CIL (incl Mayoral)	£220	£220	£100	£90	£90	£220	£210	£60	£60
Crossrail S106	£0	£0	£0	£0	£0	£0	£0	£0	£0
S106 (per net sq m)	£ psm								

Cashflow timing

Quarters

Build start	2	2	2	2	2	2	2	2	2
Build period	8	8	8	8	8	8	8	8	8
Investment sale (quarters from start on site)	10	10	10	10	10	10	10	10	10

Note: demolition of existing floorspace is loaded as a single amount on Retail A1-A5

LOCAL PLAN AND CIL VIABILITY MODEL

Local Authority	LONDON BOROUGH OF LEWISHAM
Area(s)	
Proxy number	
Date (31 March 2018)	
Reference	0.15

DEVELOPMENT PERIOD CASHFLOW

Dev. hectare	Dev. acreage	Revenue per Qtr
Revenue	0	£ 9,412,900
Investment value of ground rents	0	£ 166,667
GDV before costs of sale		£ 9,579,567
Costs of Sale		£ 287,387
Marketing costs	0.00%	£ -
Legal fees	3.00%	£ 287,387
Sub Total		£ 287,387
Net commercial investment value		£ 9,292,180
Retail ATAG	£ -	£ -
Retail S/Wares	£ -	£ -
B1 office	£ -	£ -
B2 industrial	£ -	£ -
B8 storage	£ -	£ -
C1 Hotel	£ -	£ -
C2 res institution	£ -	£ -
D1	£ -	£ -
D2	£ -	£ -
Sub Total		£ 0
Total commercial value		£ 9,292,180
Speculative NDV		£ 9,292,180
Affordable Housing Revenue		£ 847,564
No fees on sale	0	£ 847,564
NDV		£ 10,094,846
Standard Costs		£ 4,674,773
Residential	£ 4,674,773	£ -
GF infrastructure costs	£ -	£ -
Retail ATAG	£ -	£ -
Retail S/Wares	£ -	£ -
B1 office	£ -	£ -
B2 industrial	£ -	£ -
B8 storage	£ -	£ -
C1 Hotel	£ -	£ -
C2 res institution	£ -	£ -
D1	£ -	£ -
D2	£ -	£ -
Contingency	£ 233,739	£ -
Sub Total		£ 4,908,512
Other Costs		£ 490,851
Professional fees	10.00%	£ 490,851
Sub Total		£ 490,851
CIL		£ 352,220
Resi CIL	£ 110,740	£ 110,740
Green CIL	£ 110,740	£ 110,740
Employment & Training Levy	£ 23,000	£ 23,000
Highways (25%)	£ 222,577	£ 222,577
Sub Total		£ 554,797
Total Other Costs		£ 554,797
Total Costs		£ 5,954,160
Developer's profit on GDV	18.00%	£ 1,663,971
Residual Sum before interest		£ 2,422,862
Interest	6.00%	£ 361,255
Residual Sum for quarter after interest		£ 2,061,607

Project Totals	Qtr 1	Qtr 2	Qtr 3	Qtr 4	Qtr 5	Qtr 6	Qtr 7	Qtr 8	Qtr 9	Qtr 10	Qtr 11	Qtr 12	Qtr 13	Qtr 14	Qtr 15	Qtr 16	Qtr 17	Qtr 18	Qtr 19	Qtr 20	Qtr 21	Qtr 22
Revenue	0	0	0	0	0	0	0	0	0	9,412,900	0	0	0	0	0	0	0	0	0	0	0	0
Investment value of ground rents	0	0	0	0	0	0	0	0	0	166,667	0	0	0	0	0	0	0	0	0	0	0	0
GDV before costs of sale	0	0	0	0	0	0	0	0	0	9,579,567	0											
Costs of Sale	0	0	0	0	0	0	0	0	0	287,387	0											
Marketing costs	0	0	0	0	0	0	0	0	0	-	0	0	0	0	0	0	0	0	0	0	0	0
Legal fees	0	0	0	0	0	0	0	0	0	287,387	0	0	0	0	0	0	0	0	0	0	0	0
Sub Total	0	0	0	0	0	0	0	0	0	574,774	0											
Net commercial investment value	0	0	0	0	0	0	0	0	0	9,004,793	0											
Retail ATAG	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Retail S/Wares	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
B1 office	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
B2 industrial	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
B8 storage	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
C1 Hotel	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
C2 res institution	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
D1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
D2	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Sub Total	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Total commercial value	0	0	0	0	0	0	0	0	0	9,004,793	0											
Speculative NDV	0	0	0	0	0	0	0	0	0	9,004,793	0											
Affordable Housing Revenue	0	105,946	0																			
No fees on sale	0	105,946	105,946	105,946	105,946	105,946	105,946	105,946	105,946	105,946	0	0	0	0	0	0	0	0	0	0	0	0
NDV	0	105,946	9,244,282	0																		
Standard Costs	0	584,347	0																			
Residential	0	584,347	584,347	584,347	584,347	584,347	584,347	584,347	584,347	584,347	0	0	0	0	0	0	0	0	0	0	0	0
GF infrastructure costs	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Retail ATAG	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Retail S/Wares	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
B1 office	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
B2 industrial	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
B8 storage	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
C1 Hotel	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
C2 res institution	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
D1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
D2	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Contingency	0	233,739	233,739	233,739	233,739	233,739	233,739	233,739	233,739	233,739	0	0	0	0	0	0	0	0	0	0	0	0
Sub Total	0	613,564	0																			
Other Costs	0	61,356	0																			
Professional fees	0	61,356	61,356	61,356	61,356	61,356	61,356	61,356	61,356	61,356	0	0	0	0	0	0	0	0	0	0	0	0
Sub Total	0	61,356	0																			
CIL	0	110,740	0																			
Resi CIL	0	110,740	110,740	110,740	110,740	110,740	110,740	110,740	110,740	110,740	0	0	0	0	0	0	0	0	0	0	0	0
Green CIL	0	110,740	110,740	110,740	110,740	110,740	110,740	110,740	110,740	110,740	0	0	0	0	0	0	0	0	0	0	0	0
Employment & Training Levy	0	23,000	23,000	23,000	23,000	23,000	23,000	23,000	23,000	23,000	0	0	0	0	0	0	0	0	0	0	0	0
Highways (25%)	0	222,577	222,577	222,577																		

LB Lewisham - CIL viability review

Small residential developments	0.15 ha
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Development mix (square metres GIA)

Residential	1,978
Retail (comparison and A3)	-
Retail (supermarket)	-
B1 office	-
B8 storage	-
C1 Hotel	-
C2 residential	-
D1	-
D2	-

Summary viability

Private housing value	£9,244,282
Affordable housing value	£847,564
Commercial value	£0
Build costs	£4,908,512
Fees	£490,851
CIL	£332,220
Resi S106	£37,500
Accessibility standards	£25,077
Green roofs	£135,000
Employment & Training levy	£0
Highways/S278	£25,000
Developer's profit	£1,714,825
Interest	£646,443
Gross Residual Land Value	£1,776,419
<i>Stamp duty, agents and legal fees</i>	£120,797
NET RESIDUAL LAND VALUE	£1,655,622

Benchmark land value	£1,500,000
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Viable or unviable	Viable
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Appendix 5 - Development appraisals

LB Lewisham - CIL viability review

Small residential developments (backland, infill etc)	0.10 ha
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Development mix (square metres GIA)

Residential	873
Retail (comparison and A3)	-
Retail (supermarket)	-
B1 office	-
B8 storage	-
C1 Hotel	-
C2 residential	-
D1	-
D2	-
Affordable housing	20%

Summary viability

Private housing value	£4,507,909
Affordable housing value	£373,957
Commercial value	£0
Build costs	£2,016,344
Fees	£201,634
CIL	£181,480
Resi S106	£16,500
Accessibility standards	£11,034
Green roofs	£90,000
Employment & Training levy	£0
Highways/S278	£11,000
Developer's profit	£833,861
Interest	£275,729
Gross Residual Land Value	£1,244,284
<i>Stamp duty, agents and legal fees</i>	£84,611
NET RESIDUAL LAND VALUE	£1,159,673

Benchmark land value	£250,000
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Viable or unviable	Viable
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LB Lewisham - CIL viability review

Small residential developments (backland, infill etc)	0.05 ha
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Development mix (square metres GIA)

Residential	383
Retail (comparison and A3)	-
Retail (supermarket)	-
B1 office	-
B8 storage	-
C1 Hotel	-
C2 residential	-
D1	-
D2	-
Affordable housing	20%

Summary viability

Private housing value	£1,977,390
Affordable housing value	£163,941
Commercial value	£0
Build costs	£883,956
Fees	£88,396
CIL	£79,560
Resi S106	£0
Accessibility standards	£5,015
Green roofs	£45,000
Employment & Training levy	£0
Highways/S278	£0
Developer's profit	£365,767
Interest	£105,806
Gross Residual Land Value	£567,831
<i>Stamp duty, agents and legal fees</i>	£38,613
NET RESIDUAL LAND VALUE	£529,218

Benchmark land value	£125,000
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Viable or unviable	Viable
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LB Lewisham - CIL viability review

Very small residential	0.03 ha
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Development mix (square metres GIA)

Residential	108
Retail (comparison and A3)	-
Retail (supermarket)	-
B1 office	-
B8 storage	-
C1 Hotel	-
C2 residential	-
D1	-
D2	-
Affordable housing	20%

Summary viability

Private housing value	£643,173
Affordable housing value	£54,206
Commercial value	£0
Build costs	£225,708
Fees	£22,571
CIL	£22,360
Resi S106	£0
Accessibility standards	£748
Green roofs	£22,500
Employment & Training levy	£0
Highways/S278	£0
Developer's profit	£119,023
Interest	£32,737
Gross Residual Land Value	£251,731
<i>Stamp duty, agents and legal fees</i>	£17,118
NET RESIDUAL LAND VALUE	£234,613

Benchmark land value	£75,000
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Viable or unviable	Viable
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LB Lewisham - CIL viability review

Small residential developments	0.15 ha
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Development mix (square metres GIA)

Residential	1,978
Retail (comparison and A3)	-
Retail (supermarket)	-
B1 office	-
B8 storage	-
C1 Hotel	-
C2 residential	-
D1	-
D2	-
Affordable housing	20%

Summary viability

Private housing value	£10,217,508
Affordable housing value	£847,564
Commercial value	£0
Build costs	£4,908,512
Fees	£490,851
CIL	£411,320
Resi S106	£37,500
Accessibility standards	£25,077
Green roofs	£135,000
Employment & Training levy	£0
Highways/S278	£25,000
Developer's profit	£1,890,005
Interest	£754,011
Gross Residual Land Value	£2,387,797
<i>Stamp duty, agents and legal fees</i>	£162,370
NET RESIDUAL LAND VALUE	£2,225,427

Benchmark land value	£375,000
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Viable or unviable	Viable
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LB Lewisham - CIL viability review

Residential development	0.25 ha
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Development mix (square metres GIA)

Residential	4,170
Retail (comparison and A3)	-
Retail (supermarket)	-
B1 office	-
B8 storage	-
C1 Hotel	-
C2 residential	-
D1	-
D2	-
Affordable housing	20%

Summary viability

Private housing value	£21,528,410
Affordable housing value	£1,787,279
Commercial value	£0
Build costs	£10,350,693
Fees	£1,035,069
CIL	£867,360
Resi S106	£75,000
Accessibility standards	£50,153
Green roofs	£262,500
Employment & Training levy	£0
Highways/S278	£50,000
Developer's profit	£3,982,351
Interest	£1,700,485
Gross Residual Land Value	£4,942,079
<i>Stamp duty, agents and legal fees</i>	£336,061
NET RESIDUAL LAND VALUE	£4,606,018

Benchmark land value	£625,000
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Viable or unviable	Viable
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LB Lewisham - CIL viability review

Small scale mixed use, local centres	0.02 ha
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Development mix (square metres GIA)

Residential	383
Retail (comparison and A3)	50
Retail (supermarket)	-
B1 office	-
B8 storage	-
C1 Hotel	-
C2 residential	-
D1	-
D2	-
Affordable housing	20%

Summary viability

Private housing value	£1,977,390
Affordable housing value	£163,941
Commercial value	£241,850
Build costs	£987,937
Fees	£98,794
CIL	£79,560
Resi S106	£7,500
Accessibility standards	£5,015
Green roofs	£24,000
Employment & Training levy	£0
Highways/S278	£5,750
Developer's profit	£409,300
Interest	£119,367
Gross Residual Land Value	£645,959
<i>Stamp duty, agents and legal fees</i>	£43,925
NET RESIDUAL LAND VALUE	£602,034

Benchmark land value	£50,000
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Viable or unviable	Viable
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LB Lewisham - CIL viability review

Small scale mixed use, local centres	0.02 ha
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Development mix (square metres GIA)

Residential	383
Retail (comparison and A3)	-
Retail (supermarket)	-
B1 office	50
B8 storage	-
C1 Hotel	-
C2 residential	-
D1	-
D2	-
Affordable housing	20%

Summary viability

Private housing value	£1,977,390
Affordable housing value	£163,941
Commercial value	£230,076
Build costs	£1,012,680
Fees	£101,268
CIL	£79,560
Resi S106	£7,500
Accessibility standards	£5,015
Green roofs	£24,000
Employment & Training levy	£0
Highways/S278	£5,750
Developer's profit	£407,180
Interest	£116,779
Gross Residual Land Value	£611,675
<i>Stamp duty, agents and legal fees</i>	£41,594
NET RESIDUAL LAND VALUE	£570,081

Benchmark land value	£50,000
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Viable or unviable	Viable
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LB Lewisham - CIL viability review

Small mixed use	0.15 ha
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Development mix (square metres GIA)

Residential	1,978
Retail (comparison and A3)	200
Retail (supermarket)	-
B1 office	-
B8 storage	-
C1 Hotel	-
C2 residential	-
D1	-
D2	-
Affordable housing	20%

Summary viability

Private housing value	£10,217,508
Affordable housing value	£847,564
Commercial value	£967,401
Build costs	£5,324,435
Fees	£532,444
CIL	£411,320
Resi S106	£37,500
Accessibility standards	£25,077
Green roofs	£180,000
Employment & Training levy	£0
Highways/S278	£28,000
Developer's profit	£2,064,138
Interest	£822,668
Gross Residual Land Value	£2,606,893
<i>Stamp duty, agents and legal fees</i>	£177,269
NET RESIDUAL LAND VALUE	£2,429,624

Benchmark land value	£375,000
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Viable or unviable	Viable
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LB Lewisham - CIL viability review

Small mixed use	0.20 ha
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Development mix (square metres GIA)

Residential	2,468
Retail (comparison and A3)	-
Retail (supermarket)	-
B1 office	300
B8 storage	-
C1 Hotel	-
C2 residential	-
D1	-
D2	-
Affordable housing	20%

Summary viability

Private housing value	£12,741,595
Affordable housing value	£1,057,580
Commercial value	£1,380,458
Build costs	£6,897,123
Fees	£689,712
CIL	£513,240
Resi S106	£45,000
Accessibility standards	£30,092
Green roofs	£240,000
Employment & Training levy	£0
Highways/S278	£34,500
Developer's profit	£2,605,424
Interest	£1,021,462
Gross Residual Land Value	£3,103,079
<i>Stamp duty, agents and legal fees</i>	£211,009
NET RESIDUAL LAND VALUE	£2,892,070

Benchmark land value	£500,000
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Viable or unviable	Viable
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LB Lewisham - CIL viability review

Mixed use	0.30 ha
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Development mix (square metres GIA)

Residential	5,873
Retail (comparison and A3)	100
Retail (supermarket)	-
B1 office	700
B8 storage	-
C1 Hotel	-
C2 residential	-
D1	-
D2	-
Affordable housing	20%

Summary viability

Private housing value	£28,558,467
Affordable housing value	£2,368,920
Commercial value	£3,704,770
Build costs	£19,244,607
Fees	£1,924,461
CIL	£1,221,480
Resi S106	£105,000
Accessibility standards	£70,214
Green roofs	£360,000
Employment & Training levy	£0
Highways/S278	£82,000
Developer's profit	£5,949,518
Interest	£2,316,176
Gross Residual Land Value	£3,358,700
<i>Stamp duty, agents and legal fees</i>	£228,392
NET RESIDUAL LAND VALUE	£3,130,308

Benchmark land value	£750,000
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Viable or unviable	Viable
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LB Lewisham - CIL viability review

Mixed use	0.70 ha
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Development mix (square metres GIA)

Residential	11,930
Retail (comparison and A3)	100
Retail (supermarket)	-
B1 office	700
B8 storage	-
C1 Hotel	-
C2 residential	-
D1	-
D2	200
Affordable housing	20%

Summary viability

Private housing value	£58,066,752
Affordable housing value	£4,812,467
Commercial value	£4,225,102
Build costs	£37,655,078
Fees	£3,765,508
CIL	£2,481,440
Resi S106	£225,000
Accessibility standards	£150,459
Green roofs	£840,000
Employment & Training levy	£0
Highways/S278	£165,000
Developer's profit	£11,501,282
Interest	£4,740,097
Gross Residual Land Value	£5,580,458
<i>Stamp duty, agents and legal fees</i>	£379,471
NET RESIDUAL LAND VALUE	£5,200,987

Benchmark land value	£1,750,000
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Viable or unviable	Viable
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LB Lewisham - CIL viability review

Large mixed use (employment led)	0.80 ha
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Development mix (square metres GIA)

Residential	23,865
Retail (comparison and A3)	300
Retail (supermarket)	-
B1 office	4,500
B8 storage	-
C1 Hotel	-
C2 residential	-
D1	-
D2	200
Affordable housing	20%

Summary viability

Private housing value	£116,157,436
Affordable housing value	£9,626,950
Commercial value	£22,678,307
Build costs	£82,880,644
Fees	£8,288,064
CIL	£4,963,920
Resi S106	£450,000
Accessibility standards	£300,918
Green roofs	£960,000
Employment & Training levy	£0
Highways/S278	£375,000
Developer's profit	£25,568,051
Interest	£15,615,997
Gross Residual Land Value	£9,060,099
<i>Stamp duty, agents and legal fees</i>	£616,087
NET RESIDUAL LAND VALUE	£8,444,012

Benchmark land value	£2,000,000
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Viable or unviable	Viable
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LB Lewisham - CIL viability review

Town Centre	0.30 ha
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Development mix (square metres GIA)

Residential	15,910
Retail (comparison and A3)	200
Retail (supermarket)	-
B1 office	500
B8 storage	-
C1 Hotel	-
C2 residential	-
D1	-
D2	-
Affordable housing	20%

Summary viability

Private housing value	£75,058,552
Affordable housing value	£6,217,405
Commercial value	£3,528,331
Build costs	£48,708,652
Fees	£4,870,865
CIL	£3,309,280
Resi S106	£300,000
Accessibility standards	£200,612
Green roofs	£405,000
Employment & Training levy	£0
Highways/S278	£212,000
Developer's profit	£14,518,683
Interest	£7,217,187
Gross Residual Land Value	£5,062,009
<i>Stamp duty, agents and legal fees</i>	£344,217
NET RESIDUAL LAND VALUE	£4,717,792

Benchmark land value	£750,000
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Viable or unviable	Viable
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LB Lewisham - CIL viability review

Town Centre	1.0 ha
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Development mix (square metres GIA)

Residential	39,775
Retail (comparison and A3)	1,000
Retail (supermarket)	-
B1 office	2,500
B8 storage	-
C1 Hotel	-
C2 residential	-
D1	-
D2	250
Affordable housing	20%

Summary viability

Private housing value	£181,697,035
Affordable housing value	£15,042,110
Commercial value	£17,641,656
Build costs	£126,820,813
Fees	£12,682,081
CIL	£8,273,200
Resi S106	£750,000
Accessibility standards	£501,530
Green roofs	£1,350,000
Employment & Training levy	£0
Highways/S278	£560,000
Developer's profit	£36,783,491
Interest	£27,033,688
Gross Residual Land Value	-£374,003
<i>Stamp duty, agents and legal fees</i>	<i>-£25,432</i>
NET RESIDUAL LAND VALUE	-£348,571

Benchmark land value	£2,500,000
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Viable or unviable	Unviable
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LB Lewisham - CIL viability review

Town Centre	1.0 ha
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Development mix (square metres GIA)

Residential	19,865
Retail (comparison and A3)	500
Retail (supermarket)	-
B1 office	500
B8 storage	-
C1 Hotel	-
C2 residential	-
D1	-
D2	500
Affordable housing	20%

Summary viability

Private housing value	£96,690,169
Affordable housing value	£8,013,382
Commercial value	£6,020,098
Build costs	£62,209,066
Fees	£6,220,907
CIL	£4,131,920
Resi S106	£375,000
Accessibility standards	£250,765
Green roofs	£1,350,000
Employment & Training levy	£0
Highways/S278	£272,500
Developer's profit	£18,968,651
Interest	£10,205,138
Gross Residual Land Value	£6,739,703
<i>Stamp duty, agents and legal fees</i>	£458,300
NET RESIDUAL LAND VALUE	£6,281,403

Benchmark land value	£2,500,000
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Viable or unviable	Viable
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LB Lewisham - CIL viability review

Estate regeneration (small)	0.20 ha
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Development mix (square metres GIA)

Residential	785
Retail (comparison and A3)	-
Retail (supermarket)	-
B1 office	-
B8 storage	-
C1 Hotel	-
C2 residential	-
D1	-
D2	-
Affordable housing	20%

Summary viability

Private housing value	£4,056,490
Affordable housing value	£336,454
Commercial value	£0
Build costs	£1,814,132
Fees	£181,413
CIL	£163,280
Resi S106	£15,000
Accessibility standards	£10,031
Green roofs	£240,000
Employment & Training levy	£0
Highways/S278	£10,000
Developer's profit	£750,355
Interest	£207,262
Gross Residual Land Value	£1,001,472
<i>Stamp duty, agents and legal fees</i>	£68,100
NET RESIDUAL LAND VALUE	£933,372

Benchmark land value	£500,000
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Viable or unviable	Viable
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LB Lewisham - CIL viability review

Estate regeneration (large)	4.0 ha
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Development mix (square metres GIA)

Residential	15,910
Retail (comparison and A3)	100
Retail (supermarket)	-
B1 office	-
B8 storage	-
C1 Hotel	-
C2 residential	-
D1	-
D2	250
Affordable housing	20%

Summary viability

Private housing value	£75,058,552
Affordable housing value	£6,217,405
Commercial value	£1,134,117
Build costs	£47,691,636
Fees	£4,769,164
CIL	£3,309,280
Resi S106	£300,000
Accessibility standards	£200,612
Green roofs	£4,800,000
Employment & Training levy	£0
Highways/S278	£205,250
Developer's profit	£14,087,725
Interest	£6,567,316
Gross Residual Land Value	£479,092
<i>Stamp duty, agents and legal fees</i>	£32,578
NET RESIDUAL LAND VALUE	£446,514

Benchmark land value	£10,000,000
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Viable or unviable	Unviable
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LB Lewisham - CIL viability review

Student housing	0.30 ha
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Development mix (square metres GIA)

Residential	-
Retail (comparison and A3)	150
Retail (supermarket)	-
B1 office	400
B8 storage	-
C1 Hotel	-
C2 residential	-
D1	3,000
D2	-
Affordable housing	20%

Summary viability

Private housing value	£0
Affordable housing value	£0
Commercial value	£19,131,659
Build costs	£10,498,682
Fees	£1,049,868
CIL	£0
Resi S106	£0
Accessibility standards	£0
Green roofs	£405,000
Employment & Training levy	£0
Highways/S278	£53,250
Developer's profit	£3,443,699
Interest	£1,193,429
Gross Residual Land Value	£2,487,731
<i>Stamp duty, agents and legal fees</i>	£169,166
NET RESIDUAL LAND VALUE	£2,318,565

Benchmark land value	£750,000
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Viable or unviable	Viable
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LB Lewisham - CIL viability review

Hotels	0.20 ha
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Development mix (square metres GIA)

Residential	2,010
Retail (comparison and A3)	250
Retail (supermarket)	-
B1 office	-
B8 storage	-
C1 Hotel	-
C2 residential	2,000
D1	-
D2	-
Affordable housing	20%

Summary viability

Private housing value	£10,652,989
Affordable housing value	£861,494
Commercial value	£13,859,882
Build costs	£12,439,451
Fees	£1,243,945
CIL	£418,080
Resi S106	£0
Accessibility standards	£67,205
Green roofs	£270,000
Employment & Training levy	£0
Highways/S278	£33,750
Developer's profit	£4,464,006
Interest	£1,759,071
Gross Residual Land Value	£4,678,857
<i>Stamp duty, agents and legal fees</i>	£318,162
NET RESIDUAL LAND VALUE	£4,360,695

Benchmark land value	£500,000
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Viable or unviable	Viable
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LB Lewisham - CIL viability review

Office	0.60 ha
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Development mix (square metres GIA)

Residential	-
Retail (comparison and A3)	-
Retail (supermarket)	-
B1 office	500
B8 storage	-
C1 Hotel	-
C2 residential	-
D1	-
D2	-
Affordable housing	20%

Summary viability

Private housing value	£0
Affordable housing value	£0
Commercial value	£2,300,764
Build costs	£1,287,238
Fees	£128,724
CIL	£0
Resi S106	£0
Accessibility standards	£0
Green roofs	£810,000
Employment & Training levy	£0
Highways/S278	£7,500
Developer's profit	£414,137
Interest	£85,180
Gross Residual Land Value	-£432,015
<i>Stamp duty, agents and legal fees</i>	<i>-£29,377</i>
NET RESIDUAL LAND VALUE	-£402,638

Benchmark land value	£1,500,000
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Viable or unviable	Unviable
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LB Lewisham - CIL viability review

Storage	0.20 ha
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Development mix (square metres GIA)

Residential	-
Retail (comparison and A3)	-
Retail (supermarket)	-
B1 office	1,000
B8 storage	-
C1 Hotel	1,500
C2 residential	-
D1	-
D2	-
Affordable housing	20%

Summary viability

Private housing value	£0
Affordable housing value	£0
Commercial value	£7,546,504
Build costs	£4,757,552
Fees	£475,755
CIL	£0
Resi S106	£0
Accessibility standards	£0
Green roofs	£240,000
Employment & Training levy	£0
Highways/S278	£37,500
Developer's profit	£1,358,371
Interest	£239,987
Gross Residual Land Value	£437,340
<i>Stamp duty, agents and legal fees</i>	£29,739
NET RESIDUAL LAND VALUE	£407,601

Benchmark land value	£500,000
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Viable or unviable	Unviable
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LB Lewisham - CIL viability review

Residential care home (7 units)	0.03 ha
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Development mix (square metres GIA)

Residential	-
Retail (comparison and A3)	-
Retail (supermarket)	-
B1 office	-
B8 storage	-
C1 Hotel	-
C2 residential	-
D1	250
D2	-
Affordable housing	20%

Summary viability

Private housing value	£45,033
Affordable housing value	£0
Commercial value	£1,380,458
Build costs	£758,617
Fees	£75,862
CIL	£0
Resi S106	£10,500
Accessibility standards	£7,021
Green roofs	£36,000
Employment & Training levy	£0
Highways/S278	£7,000
Developer's profit	£256,588
Interest	£62,508
Gross Residual Land Value	£211,395
<i>Stamp duty, agents and legal fees</i>	£14,375
NET RESIDUAL LAND VALUE	£197,020

Benchmark land value	£75,000
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Viable or unviable	Viable
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LB Lewisham - CIL viability review

Strategic site 1	0.77 ha
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Development mix (square metres GIA)

Residential	18,315
Retail (comparison and A3)	200
Retail (supermarket)	-
B1 office	1,600
B8 storage	-
C1 Hotel	-
C2 residential	-
D1	-
D2	200
Affordable housing	20%

Summary viability

Private housing value	£89,142,583
Affordable housing value	£7,388,124
Commercial value	£8,850,177
Build costs	£58,918,657
Fees	£5,891,866
CIL	£3,809,520
Resi S106	£345,000
Accessibility standards	£230,704
Green roofs	£924,000
Employment & Training levy	£0
Highways/S278	£260,000
Developer's profit	£18,081,984
Interest	£7,910,926
Gross Residual Land Value	£9,008,228
<i>Stamp duty, agents and legal fees</i>	£612,560
NET RESIDUAL LAND VALUE	£8,395,668

Benchmark land value	£1,925,000
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Viable or unviable	Viable
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LB Lewisham - CIL viability review

Strategic site 2	0.85 ha
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Development mix (square metres GIA)

Residential	19,865
Retail (comparison and A3)	300
Retail (supermarket)	-
B1 office	3,000
B8 storage	-
C1 Hotel	400
C2 residential	-
D1	-
D2	300
Affordable housing	20%

Summary viability

Private housing value	£96,690,169
Affordable housing value	£8,013,382
Commercial value	£16,821,510
Build costs	£68,178,463
Fees	£6,817,846
CIL	£4,131,920
Resi S106	£375,000
Accessibility standards	£250,765
Green roofs	£1,020,000
Employment & Training levy	£0
Highways/S278	£310,000
Developer's profit	£20,912,905
Interest	£10,339,134
Gross Residual Land Value	£9,189,027
<i>Stamp duty, agents and legal fees</i>	£624,854
NET RESIDUAL LAND VALUE	£8,564,173

Benchmark land value	£2,125,000
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Viable or unviable	Viable
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LB Lewisham - CIL viability review

Strategic site 3	1.68 ha
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Development mix (square metres GIA)

Residential	29,415
Retail (comparison and A3)	6,700
Retail (supermarket)	-
B1 office	-
B8 storage	-
C1 Hotel	-
C2 residential	-
D1	-
D2	300
Affordable housing	20%

Summary viability

Private housing value	£143,172,289
Affordable housing value	£11,865,776
Commercial value	£37,481,184
Build costs	£106,375,678
Fees	£10,637,568
CIL	£6,118,320
Resi S106	£555,000
Accessibility standards	£371,132
Green roofs	£2,016,000
Employment & Training levy	£0
Highways/S278	£499,750
Developer's profit	£33,229,572
Interest	£17,062,979
Gross Residual Land Value	£15,653,250
<i>Stamp duty, agents and legal fees</i>	£1,064,421
NET RESIDUAL LAND VALUE	£14,588,829

Benchmark land value	£4,200,000
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Viable or unviable	Viable
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LB Lewisham - CIL viability review

Strategic site 4	0.28 ha
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Development mix (square metres GIA)

Residential	19,250
Retail (comparison and A3)	500
Retail (supermarket)	-
B1 office	200
B8 storage	-
C1 Hotel	-
C2 residential	-
D1	-
D2	200
Affordable housing	20%

Summary viability

Private housing value	£87,936,429
Affordable housing value	£7,279,965
Commercial value	£3,859,141
Build costs	£58,682,297
Fees	£5,868,230
CIL	£4,004,000
Resi S106	£363,000
Accessibility standards	£242,741
Green roofs	£336,000
Employment & Training levy	£0
Highways/S278	£255,500
Developer's profit	£16,960,001
Interest	£8,249,371
Gross Residual Land Value	£4,114,396
<i>Stamp duty, agents and legal fees</i>	£279,779
NET RESIDUAL LAND VALUE	£3,834,617

Benchmark land value	£700,000
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Viable or unviable	Viable
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LB Lewisham - CIL viability review

Strategic site 5	1.14 ha
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Development mix (square metres GIA)

Residential	42,965
Retail (comparison and A3)	3,000
Retail (supermarket)	-
B1 office	500
B8 storage	-
C1 Hotel	-
C2 residential	-
D1	-
D2	250
Affordable housing	20%

Summary viability

Private housing value	£196,268,696
Affordable housing value	£16,248,504
Commercial value	£18,112,613
Build costs	£135,193,053
Fees	£13,519,305
CIL	£8,936,720
Resi S106	£810,000
Accessibility standards	£541,652
Green roofs	£1,368,000
Employment & Training levy	£0
Highways/S278	£600,000
Developer's profit	£39,563,546
Interest	£26,335,395
Gross Residual Land Value	£3,762,142
<i>Stamp duty, agents and legal fees</i>	£275,759
NET RESIDUAL LAND VALUE	£3,779,525

Benchmark land value	£2,850,000
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Viable or unviable	Viable
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LB Lewisham - CIL viability review

Strategic site 6	0.30 ha
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Development mix (square metres GIA)

Residential	14,315
Retail (comparison and A3)	250
Retail (supermarket)	-
B1 office	-
B8 storage	-
C1 Hotel	-
C2 residential	-
D1	-
D2	-
Affordable housing	20%

Summary viability

Private housing value	£65,392,984
Affordable housing value	£5,413,647
Commercial value	£1,209,251
Build costs	£42,531,321
Fees	£4,253,132
CIL	£2,977,520
Resi S106	£270,000
Accessibility standards	£180,551
Green roofs	£315,000
Employment & Training levy	£0
Highways/S278	£183,750
Developer's profit	£12,313,221
Interest	£5,277,616
Gross Residual Land Value	£3,713,771
<i>Stamp duty, agents and legal fees</i>	£252,536
NET RESIDUAL LAND VALUE	£3,461,235

Benchmark land value	£750,000
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Viable or unviable	Viable
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LB Lewisham - CIL viability review

Strategic site 7	0.60 ha
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Development mix (square metres GIA)

Residential	14,315
Retail (comparison and A3)	-
Retail (supermarket)	-
B1 office	250
B8 storage	-
C1 Hotel	-
C2 residential	-
D1	-
D2	-
Affordable housing	20%

Summary viability

Private housing value	£67,534,150
Affordable housing value	£5,594,102
Commercial value	£1,150,382
Build costs	£42,655,036
Fees	£4,265,504
CIL	£2,977,520
Resi S106	£270,000
Accessibility standards	£180,551
Green roofs	£630,000
Employment & Training levy	£0
Highways/S278	£183,750
Developer's profit	£12,698,862
Interest	£2,837,093
Gross Residual Land Value	£7,580,318
<i>Stamp duty, agents and legal fees</i>	£515,462
NET RESIDUAL LAND VALUE	£7,064,856

Benchmark land value	£750,000
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Viable or unviable	Viable
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Community Infrastructure Levy (CIL)

Affordable Housing Delivery and Planning Obligations Background Report

May 2018

Appendix D

1. Introduction

- 1.1 Since the introduction of the Community Infrastructure Levy ('CIL'), Section 106 ('S106') planning obligations continue to be used, including to secure affordable housing, but they now have a more restricted role. S106 planning obligations are used to secure some site specific impact mitigation in order for a development to be granted planning permission, whilst CIL is used to help deliver infrastructure to support the development of an area.
- 1.2 The CIL Regulations 2010 (as amended) require that to set a CIL charging schedule, charging authorities must have an appropriate evidence base to support the proposed levy. The National Planning Policy Guidance (NPPG) states that the evidence base should include information on the infrastructure needs to support growth and an overall assessment of the economic viability of new development. The NPPG also states that as background evidence, the charging authority should provide information about the amount of funding collected in recent years through Section 106 agreements. This should include information on the extent to which affordable housing and other targets have been met.
- 1.3 This report provides information about the amount of funding raised in recent years through planning obligations and examines the extent to which affordable housing targets have been met. The borough's current infrastructure needs and information on the economic viability of new development are subject to separate reports.

2. Affordable Housing

- 2.1 The Core Strategy was adopted in June 2011 and forms part of the development plan for the borough. Core Strategy Policy 1 seeks to maximise the provision of affordable housing in the borough with a strategic target of 50% affordable housing from all sources. These affordable homes are secured through planning obligations and through residential development schemes led by registered social housing providers or similar bodies. Affordable housing is sought on any site capable of providing 10 or more residential units and the starting point for negotiations is 50% affordable housing, subject to a financial viability assessment.
- 2.2 Tables 1 and 2 below show the amount of affordable housing approved and delivered in the borough for each of the financial years since 2011-2012.

Table 1: Affordable housing units approved (net)

	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17
Number of affordable housing units approved	1070	250	49	343	387	235
% of affordable housing approved	17%	41%	6%	24%	16%	20%

Source: London Development Database

Table 2: Affordable housing units delivered (net)

	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17
Number of affordable housing units delivered	554	564	224	418	211	327
% of affordable housing delivered	47%	31%	30%	29%	14%	23%

Source: London Development Database and GLA Affordable Housing database

Appendix D

- 2.3 Tables 1 and 2 show that the percentage of affordable housing approved and delivered varies significantly from year to year. Whilst the percentage of affordable housing delivered is below the Council's 50% strategic target, it indicates our flexibility in applying the affordable housing policy where justified by financial viability, and in meeting wider aspirations around comprehensive regeneration across the borough and the provision of much needed housing and other benefits to local communities. This also reflects the cyclical delivery of homes in general, and the reality of how large phased developments (including estate regeneration) are often delivered on site, resulting in a 'lumpy' supply of affordable units across multiple years (acknowledged in paragraph 1.1.37 of the Housing Supplementary Planning Guidance, GLA 2016).
- 2.4 In practice the amount and type of affordable housing actually delivered on-site often differs from the original planning permission, through variations to Section 106 agreements, Section 73 applications or affordable housing review clauses secured through planning obligations. The affordable housing figures outlined above should therefore be considered to be a minimum.
- 2.5 Since the implementation of the borough CIL, a number of contributions in lieu have also been secured towards affordable housing. To date, the Council has received a total of around £20 million towards affordable housing provision in the borough which is not reflected in the above tables, and which is being used to deliver additional affordable housing within the borough.

3. Planning Obligations and CIL

- 3.1 The Planning Obligations Supplementary Planning Document (SPD) was adopted in April 2015 and provides detailed guidance on the Council's approach to planning obligations. The SPD sets out how and when we will seek obligations from developers and clarifies the relationship between planning obligations and CIL. Since the adoption of CIL in April 2015, we now only seek planning obligations for some site specific impact mitigation in order for a development to be granted planning permission.
- 3.2 Table 4 below shows the number of Section 106 agreements signed and the total financial contributions secured and received through planning obligations since 2011-2012 and borough CIL receipts since 2014-2015.

Table 4: Total financial contributions secured and received through planning obligations and CIL Receipts

	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17
Number of Section 106 agreements signed	42	9	22	27	34	24
Total financial contributions secured (£ millions)	£39.7	£1.2	£3	£7.6	£1.2	£4.7
Total financial contributions received (£ millions)	£2.8	£4.3	£3.7	£7.7	£5.2	£7.8
CIL (£ millions)	0	0	0	0	£1.4	£4.4

Source: AMR and Section 106 Monitoring Database

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- 3.3 From 1 April 2015 up to the time of analysis (Dec 2017), 63 developments have been approved subject to planning obligations, including 30 deeds of variation and 5 unilateral agreements.
- 3.4 The total level of funding secured through planning obligations since 2011-2012 is around £58 million and the total received around £32 million. The total CIL funding received since the borough CIL was implemented is £5.8 million.
- 3.5 In general, the value of financial contributions received through planning obligations has been increasing over time. This is, for the most part, due to the number of large strategic sites that were granted planning permission in 2011-2012 and the subsequent delay between the grant of planning permission and the development reaching the trigger points for payments to be made under these agreements. It is expected that over time the total value of contributions received through planning obligations will decrease and the income generated from CIL will increase.



Community Infrastructure Levy (CIL)

Equalities Analysis Assessment

May 2018

1. Introduction

- 1.1 Lewisham is a diverse community made up of many different groups and individuals, therefore it is essential to try to understand the different contributions, perspectives and experience that people in our community have. We believe that the diversity of our population is one of our greatest strengths. We also recognise that not everyone's experience is equal and there are many forms of discrimination affecting people's lives. Equality of opportunity and freedom from discrimination is a fundamental right for everyone.
- 1.2 This report represents the Equalities Analysis Assessment ('EqAA') on the Council's revised Community Infrastructure Levy ('CIL'). It looks at how the objectives of the proposal might affect different groups in the community and assesses whether these effects are positive or negative. It also outlines the actions that the Council will take to ensure that equal opportunities are promoted and that no group is disproportionately discriminated against. The EqAA will be reviewed following each stage of public consultation.

2. Background

- 2.1 Public bodies such as local authorities are legally required to consider the three aims of the Public Sector Equality Duty (set out in the Equality Act 2010) and document their thinking as part of any decision-making processes. The Act sets out that public bodies must have 'due regard' to the need to:
- Eliminate unlawful discrimination, harassment and victimisation;
 - Advance equality of opportunity between people who share a protected characteristic and those who do not share that characteristic; and
 - Foster good relationships between those who share a protected characteristic and those who do not share that characteristic.
- 2.2 The following equalities characteristics are 'protected' from unlawful discrimination in service provision under the Equality Act 2010: age; disability; gender reassignment; pregnancy and maternity; marriage and civil partnership; race; religion and belief; gender; and sexual orientation.
- 2.3 The Human Rights Act came into effect in the United Kingdom ('UK') in October 2000. It means that people in the UK can take cases about their human rights as defined in the European convention on Human Rights to a UK court. At least 11 Articles of the European Convention on Human Rights have implications for the provision of public services and functions. This EqAA assesses whether the proposed recommendations are in line with the duties established by this Act.
- 2.4 Against the backdrop of the Equality Act 2010, Lewisham's Comprehensive Equalities Scheme (CES) was developed and agreed by the Mayor in 2012. The CES is the Council's overarching equalities vision statement. It specifically describes how the 'Public Sector Equality Duty' will be addressed through five overarching objectives:
- Tackling victimisation discrimination and harassment;
 - Closing the gap in outcomes for citizens;
 - Improving access to services;
 - Improving mutual understanding and respect; and
 - Improving participation and engagement.
- 2.5 The Department for Communities and Local Government (DCLG) undertook an Impact Assessment of the Community Infrastructure Levy ('CIL') legislation and regulations in January 2010. Part of this assessment states that:
- "The Community Infrastructure Levy is unlikely to have an adverse impact on any social group. By making communities more sustainable, the Community Infrastructure Levy will facilitate economic growth and liveability and so create opportunity for all. The infrastructure and services that the Community Infrastructure Levy will provide (such as medical and community facilities and transport networks) will enhance accessibility and liveability for all sectors of society, and could help to deliver new infrastructure that serves different needs within the community, for example, by increasing mobility and accessibility. We do not anticipate the reforms to the Community Infrastructure Levy changing this assessment".

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- 2.6 This gives a clear indication that the government does not expect the implementation of CIL to cause any equalities concerns, in fact they anticipate that it will, in general, have a positive influence on a number of equalities groups.
- 2.7 The Lewisham Core Strategy (2011) sets out the vision, objectives, strategy and policies that will guide public and private sector investment to manage development and regeneration in the borough until 2026. The Core Strategy has already been through an EqAA, including public consultation and examination and has been found sound. Therefore it stands, that the growth agenda itself has been found sound in terms of its impacts upon equalities groups.
- 2.8 The Council's adopted CIL (2015) was also subject to an EqAA, which concluded that there were no major concerns regarding equalities and the overall principles of introducing a CIL charge. Minor concerns were raised over the process by which developments are made exempt from paying CIL and how the income from CIL is applied.

3. CIL Preliminary Draft Charging Schedule

- 3.1 CIL is a levy that local authorities can choose to charge on new development in their area, enacted through the Community Infrastructure Levy Regulations 2010 (as amended). Local authorities must spend the levy on infrastructure needed to support the development of their area, which can include a wide range of infrastructure such as schools, hospitals, roads, open space, and leisure facilities.
- 3.2 In order to charge CIL, the Council must produce a 'charging schedule' which identifies the rate (or rates) for different types of development. The process for preparing and adopting a CIL involves a number of stages as set out below:
1. Consultation on a preliminary draft charging schedule ('PDCS')
 2. Consultation on a draft charging schedule ('DCS')
 3. Submission of the draft charging schedule to an independent examiner, consultation on any post-submission modifications and examination-in-public ('EiP').
 4. Receipt of the examiner's report and adoption of CIL
- 3.3 The Council adopted its current CIL charging schedule in 2015, and is currently at the first stage of the process in terms of revising the adopted CIL.
- 3.4 The PDCS sets out the initial revised proposals for the CIL rates for consultation. The levy rate is dependent upon the size, development type and geographic location of the proposed development. A further consultation on the DCS is anticipated in late 2018 with an EiP of the revised draft charging schedule anticipated in early 2019. Adoption (subject to receiving a favourable report from the examiner) is currently anticipated in April 2019.

4. Assessment

Introduction

- 4.1 There are two main aspects to the implementation of the revised CIL charging schedule that may have an impact on equalities, namely the CIL charging rates which apply to development and the delivery of the infrastructure funded by CIL.
- 4.2 Developers, including homeowners who wish to extend their homes by more than 100 square metres, are the main people who will be affected by the revised CIL charging schedule.
- 4.3 The revised CIL will not affect the Council's policy to require affordable housing delivery as this will continue to be delivered through Section 106 agreements. Therefore the introduction of CIL will not affect any resident's entitlement to affordable housing, including residents with any of the nine protected equalities characteristics set out below.
- 4.4 The money generated through CIL must be spent on infrastructure to support new development in the borough such as schools, hospitals, roads, open space, and leisure facilities. Improved provision of such infrastructure is generally expected to have a positive impact on all people who live, work and visit the borough. The Council will, however, need to ensure that the process for spending funds raised through CIL is fair and does not discriminate or negatively impact on any particular group or sector of the community.
- 4.5 The CIL Regulations 2010 (as amended) require that 15% of the CIL funds collected are spent on local priorities, or 25% where an area has a Neighbourhood Plan. The Council's proposal to have two charging zones may result in some areas generating more CIL receipts than others due to both the higher charge in zone 1 of the PDCS and due to the quantum of development that is likely to come forward in different areas of the borough.
- 4.6 The Council is aware of these inherent disparities of CIL and will continue to utilise other funding sources to provide infrastructure and support for all areas of the borough. It should also be noted that CIL funding is used to help deliver 'strategic infrastructure' (i.e. infrastructure that will benefit the entire borough) and therefore the infrastructure will be delivered wherever required, for the benefit of the borough as a whole.
- 4.7 The CIL Regulations provide for a number of exemptions and relief from the CIL charge. Affordable housing and developments used by charities for charitable purposes for example do not have to pay CIL. It is important that the Council ensures that exemptions and relief are applied in accordance with the CIL Regulations and that any 'exceptional circumstances relief' is decided solely on economic viability and no other reason to ensure that no group or sector of the community is disadvantaged.
- 4.8 The following section considers the potential impacts (positive and negative) of the revised CIL on the key 'protected characteristics' in the Equality Act 2010 and Human Rights, the equality information on which the analysis is based and any mitigating actions to be taken.

Gender

- 4.9 Gender has the meaning usually given to it and refers to whether a person is a man or a woman. A summary of data on gender is set out in the box below.

DATA SUMMARY FOR GENDER

- According to the 2011 Census there are 135,000 males living in Lewisham and 140,900 females.
- By 2030 it is forecast that the number of males would have surpassed that of females (158,500 men to 157,100 women).
- Based on the 2013 Mid-year Population Estimates Lewisham's males are more numerous than females between the 0-19 age groups. By contrast females are more numerous than males in the 20 – 44, 35 - 59 60 -79 and 80+ age groups.
- By 2030 the percentage of males is still expected to be greater than females in the 0-19 age group. Males are also expected to be more numerous in the 20 – 44, and 35 – 59 age group. However, females will still be more numerous in the 60-79 and 80+ age groups.

- 4.10 No specific impact relating to gender has been identified during this assessment. Adoption of the revised CIL is likely to have a positive impact on both male and female residents and service users alike, through developing and improving infrastructure within the borough. Equalities impacts are also assessed by relevant Council service areas who deliver infrastructure, therefore it is anticipated that the provision of new and improved infrastructure will take into account any effects of gender during delivery.

Age

- 4.11 Age refers to a person belonging to a particular age or age range. As an employer and a provider of services the Council is required to ensure that it does not unlawfully discriminate against a person on account of their age. A summary of data on age is set out in the box below.

DATA SUMMARY FOR AGE

- According to the 2011 Census some 70,100 Lewisham residents are aged between 0-19 (25% of the population), whilst some 179,800 residents are aged between 20-64 (65% of the population). By contrast there are some 26,200 older people aged 65 and over (9.5%).
- According to the 2013 Sub National Population Projections by 2021 the number of Lewisham residents aged 0-19 is expected to rise to 79,570 (25% of the population), whilst the number of people aged 20-64 is expected to reach 208,190 (65% of the population). By contrast the number of people aged 65 and older is expected to increase to 30,570 (10% of the population).
- Ward profiles suggest that a greater number of older residents (65+) live in the south of borough in areas like Downham or Grove Park; whilst younger residents (0-19) are spread throughout the borough more evenly.

- 4.12 It is likely that the revised CIL will have a positive impact on all age groups, as it will provide additional funding for infrastructure which is used by a range of age groups. Funds raised from

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CIL may also be allocated to projects and service areas which benefit particular age groups, such as, schools, youth centres, improved accessibility and facilities for older people. As a result, the CIL has the potential to positively impact upon children, young people, and older people. Equalities impacts are also assessed by relevant Council service areas who deliver infrastructure, therefore it is anticipated that the provision of new and improved infrastructure will take into account any effects of age during delivery.

Race

- 4.13 Race refers to the equality group of race. It refers to a group of people defined by their race, colour, and nationality (including citizenship) ethnic or national origins. A summary of data on race is set out in the box below.

DATA SUMMARY FOR RACE

- According to Census data from 2011, 53.6% (147, 686) of all Lewisham residents are white (White British, White Irish and White European).
- Currently people from a Black Caribbean, Black African and Black other ethnic background represent 27.2% (74,942) of the population.
- Profiles indicate that the majority of black and minority ethnic residents live in the North and Centre of the borough in wards such as Evelyn, New Cross and Rushey Green.

- 4.14 No specific impact relating to race has been identified during this assessment. Once implemented, the funding generated by CIL from new developments can be spent on a wide range of local infrastructure. As a result, CIL is likely to have a positive impact upon residents and service users from all ethnic backgrounds by providing transport infrastructure and health, education and other community facilities required in the local area. Equalities impacts are also assessed by relevant Council service areas who deliver infrastructure, therefore it is anticipated that the provision of new and improved infrastructure will take into account any effects of race during delivery.

Disability

- 4.15 A person has a disability if s/he has a physical or mental impairment which has a substantial and long-term adverse effect on that person's ability to carry out normal day-to-day activities. 'Substantial' is more than minor or trivial e.g. it takes longer than it usually would to complete an everyday action such as getting dressed, whilst a 'long-term' condition means 12 months or more. Progressive conditions can also be classed as disabilities; these are conditions that get worse over time like HIV or cancer. It should also be noted that a number of older residents are likely to be eligible for disability-specific provision, for examples for services supporting dementia or individuals who are physically incapacitated. A summary of data on disability is set out in the box below.

DATA SUMMARY FOR DISABILITY

According to the 2011 Census:

- 7.1% (19,523) Lewisham residents indicated that their day-to-day activities were limited a lot, and 7.3% (20,212) indicated that their day-to-day activities were limited a little.

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- 5.3% (14,318) Lewisham residents indicated that they are in bad health or very bad health.
- 8.1% (22,521) Lewisham residents provide some form of unpaid care. Over 5,000 Lewisham residents provide 50+ hours of unpaid care per week.
- 160 Lewisham residents indicated that sign language was their main language.

- 4.16 People with disabilities are likely to be positively affected by the implementation of the revised CIL, as the funds raised may be allocated to particular projects which will increase the capacity and accessibility of facilities in the borough. CIL funds can be used to improve the accessibility of community buildings, the public realm and public transport and therefore is likely to have a positive impact on the lives of people with disabilities. Equalities impacts are also assessed by relevant Council service areas who deliver infrastructure, therefore it is anticipated that the provision of new and improved infrastructure will take into account any effects of disability during delivery.

Religion and belief

- 4.17 Religion has the meaning usually given to it, but belief includes religious and philosophical beliefs including lack of belief. Generally, a belief should affect your life choices or the way you live for it to be included in the definition. A summary of data on religion and belief is set out in the box below.

DATA SUMMARY FOR RELIGION AND BELIEF

- The most up to date information on religion or belief in Lewisham is from the Census of 2011. This revealed that nearly 64% of Lewisham residents described themselves as having a faith or religion, whilst around 27% of residents described themselves as having no faith or religion;
- Amongst those residents that described themselves as having a faith or religion some 52.8% identified their faith as Christian, whilst 6.4% described themselves as Muslim.
- Of other religions, Hindus represent 2.4% of the population, whilst Buddhists represent just over 1.3% of the population.

- 4.18 No specific impact relating to religion and belief has been identified during this assessment. Once implemented, the funding generated by CIL from new developments can be spent on a wide range of local infrastructure. As a result, CIL is likely to have a positive impact upon residents and service users regardless of religion or belief by providing transport infrastructure and health, education and other community facilities required in the local area. Equalities impacts are also assessed by relevant Council service areas who deliver infrastructure, therefore it is anticipated that the provision of new and improved infrastructure will take into account any effects of religion and belief during delivery.

Sexual orientation

- 4.19 Sexual orientation is defined as whether a person's sexual attraction is towards the opposite sex, their own sex or to both sexes. A summary of data on sexual orientation is set out in the box below.

DATA SUMMARY FOR SEXUAL ORIENTATION

- There are no accurate statistics available regarding the profile of the lesbian, gay, bisexual and transgender (LGBT) population either in Lewisham, London or Britain as a whole.
- The Greater London Authority based its Sexual Orientation Equality Scheme on an estimate that the lesbian and gay population comprises roughly 10% of the total population.
- At the 2011 census 2% of over 16 year olds were cohabiting with someone of the same sex or were in a civil partnership, this is higher than both the England and London averages (0.9 % and 1.4% respectively).
- In the 2015 Annual Resident Survey, a question on sexual orientation found that 3% of respondents identified as lesbian or gay.

- 4.20 No specific impact relating to sexual orientation has been identified during this assessment. Once implemented, the funding generated by CIL from new developments can be spent on a wide range of local infrastructure. As a result, CIL is likely to have a positive impact upon residents and service users regardless of sexual orientation by providing transport infrastructure and health, education and other community facilities required in the local area. Equalities impacts are also assessed by relevant Council service areas who deliver infrastructure, therefore it is anticipated that the provision of new and improved infrastructure will take into account any effects of sexual orientation during delivery.

Gender re-assignment

- 4.21 Gender re-assignment describes the process of transitioning from one gender to another. For individuals within this group, the Act provides protection for trans-sexual people from discrimination and harassment in various areas, such as work or the provision of goods and services. A summary of data on gender reassignment is set out in the box below.

DATA SUMMARY FOR GENDER RE-ASSIGNMENT

- In 2006-07 Lewisham Council commissioned a research study of the LGBT populations who lived, worked, studied or socialised in the borough;
- Of the 316 respondents, seven identified as trans people, which was insufficient to draw quantitative conclusions.
- According to the NHS Secondary User Service Admitted Patients database, there were four admissions to NHS hospitals in 2011-12 of four different individuals resident in Lewisham and having a primary diagnostic code beginning F64 (trans-sexualism or gender identify disorder). Only one of these was for a full (male to female) gender reassignment. None of the admissions were to Lewisham Hospital.
- In October 2014 the Trans and Gender Non-Conforming Swimming Group (TAGS) set up a weekly private swimming session – 20 regular swimmers have attended a week, although some may have travelled from other boroughs to Lewisham.

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- 4.22 It is considered that CIL will benefit all types of people. No specific impact relating to gender reassignment has been identified during this assessment. Once implemented, the funding generated by CIL from new developments can be spent on a wide range of local infrastructure. As a result, CIL is likely to have a positive impact upon all residents and service users, by providing transport infrastructure and health, education and other community facilities required in the local area. Equalities impacts are also assessed by relevant Council service areas who deliver infrastructure, therefore it is anticipated that the provision of new and improved infrastructure will take into account any effects of gender reassignment during delivery.

Marriage and Civil Partnerships

- 4.23 The Equality Act protects against unlawful discrimination if you are legally married or in a civil partnership. A summary of data on marriage and civil partnership is set out in the box below.

DATA SUMMARY MARRIAGE AND CIVIL PARTNERSHIPS

- In 2011 about half of Lewisham residents over 16 have never been married or in a civil partnership. This is higher than England as a whole.
- A third of over 16s in Lewisham are currently married or in a civil partnership (0.5% in civil partnership)
- 17% of residents (aged 16 and over) have been married or in a civil partnership but are now separated, divorced or widowed.

- 4.24 No specific impact relating to marriage and civil partnerships has been identified during this assessment. Once implemented, the funding generated by CIL from new developments can be spent on a wide range of local infrastructure. As a result, CIL is likely to have a positive impact upon residents and service users regardless of marital or civil partnership status by providing transport infrastructure and health, education and other community facilities required in the local area. Equalities impacts are also assessed by relevant Council service areas who deliver infrastructure, therefore it is anticipated that the provision of new and improved infrastructure will take into account any effects of marriage and civil partnerships during delivery.

Pregnancy and maternity

- 4.25 Pregnancy is the condition of being pregnant or expecting a baby. Maternity refers to the period after the birth, and is linked to maternity leave in the employment context. In the non-work context, protection against maternity discrimination is for 26 weeks after giving birth, and this includes treating a woman unfavourably because she is breastfeeding. A summary of data on pregnancy and maternity is set out in the box below.

DATA SUMMARY FOR PREGNANCY AND MATERNITY

- for 2013 there were about 4,827 new babies recorded in official statistics as Lewisham residents; the General Fertility Rate is notably higher in Lewisham, at 68.1 live births per 1,000 women aged 15 – 54, than in England at 62.4 in 2013.

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- Lewisham has an underlying population growth arising from its excess of births over deaths. In a typical year, there are more births (approximately 4,500-5200) than deaths (approximately 1,500-1,800) in Lewisham residents.

- 4.26 It is considered that CIL is likely to have a positive effect on women who are pregnant or on maternity leave through additional investment in healthcare facilities, early year's facilities and accessibility improvements to community facilities, the public realm and transport infrastructure. Equalities impacts are also assessed by relevant Council service areas who deliver infrastructure, therefore it is anticipated that the provision of new and improved infrastructure will take into account any effects of pregnancy and maternity during delivery.

Human Rights

- 4.27 There are 16 rights in the Human Rights Act. Each one is called an Article. They are all taken from the European Convention on Human Rights. The Articles are 'The right to life', 'Freedom from torture', 'Inhuman and degrading treatment', 'Freedom from forced labour', 'Right to Liberty', 'Fair trial', 'Retrospective penalties', 'Privacy', 'Freedom of conscience', 'Freedom of expression', 'Freedom of assembly', 'Marriage and family', 'Freedom from discrimination' and the 'First Protocol'.
- 4.28 The adoption of a CIL will have no impacts on the Articles that are set out in the Human Rights Act. This view is supported by the Impact Assessment carried out by the Department of Communities and Local Government in relation to the introduction of CIL.

5. Conclusions

- 5.1 The revised CIL is generally expected to have a positive impact on the built environment, the local economy and people's quality of life across the borough by improving a range of infrastructure and enabling the delivery of new residential and employment development and other facilities. While the actual process of collecting CIL is unlikely to have significant implications for the equality groups identified above, the allocation of the collected funds to community infrastructure projects is likely to effect a range of people.
- 5.2 No significant concerns regarding equalities and the overall principles of introducing a revised CIL rate were identified during the analysis, however, three minor concerns were identified.
- 5.3 Of minor concern is the process by which developments are made exempt from paying CIL. The Council needs to ensure that any exemptions and relief are applied in accordance with the CIL Regulations and that any 'exceptional circumstances relief' is decided solely on economic viability and no other reason to ensure that no group or sector of the community is disadvantaged.
- 5.4 A further minor concern is how the income from CIL is spent. The money generated through CIL must be spent on infrastructure to support new development in the borough such as schools, hospitals, roads, open space, and leisure facilities. Improved provision of such infrastructure is generally expected to have a positive impact on all people who live, work and visit the borough. The Council will, however, need to ensure that the process for spending funds raised through CIL is fair and does not discriminate or negatively impact on any particular group or sector of the community. Equalities impacts are also assessed by relevant Council service areas who deliver infrastructure, therefore it is anticipated that the provision of new and improved infrastructure will take into account any equalities impacts during delivery.
- 5.5 The final minor concern identified is that the CIL Regulations 2010 (as amended) require that 15% of the CIL funds collected are spent on local priorities, or 25% where an area has a Neighbourhood Plan. The Council's proposal to have two charging zones may result in some areas generating more CIL receipts than others due to both the higher charge in zone 1 of the PDCS and due to the quantum of development that is likely to come forward in different areas of the borough. The Council is aware of these inherent disparities of CIL and will continue to utilise other funding sources to provide infrastructure and support for all areas of the borough. It should also be noted that CIL funding is used to help deliver 'strategic infrastructure' (i.e. infrastructure that will benefit the entire borough) and therefore the infrastructure will be delivered wherever required, for the benefit of the borough as a whole.
- 5.6 Ultimately, CIL is a mechanism intended to raise money to fund infrastructure that will contribute to sustainable development in the borough. In this sense, the adoption of the revised CIL should have an overall positive impact on the various equalities groups.
- 5.7 The revised charging schedule will be subject to two rounds of public consultation. The Council will take account of any representations received on the CIL Preliminary Draft Charging Schedule and Draft Charging Schedule.

6. Monitoring

	Issues Identified	Action Required	Timescale
1.	The revised CIL has not yet been adopted and is still to undergo two rounds of public consultation and an EiP. There may be some alterations necessary to the revised CIL before it is adopted.	This EqAA will be reviewed and updated where necessary in response to any relevant issues raised during consultation or the EiP.	After consultation on the PDCS and DCS and subsequent EiP.
2.	It will be important to review the impact of the revised CIL on equalities issues once it is adopted.	Consider and review the impact of the revised CIL once it has been adopted.	Post-adoption of the revised CIL



Community Infrastructure Levy (CIL)

Instalments Policy

May 2018

Appendix F

Instalments Policy

This instalment policy has been prepared and published in accordance with regulation 69B of the Community Infrastructure Levy Regulations 2010 (as amended). It takes effect on 1st August 2018.

The Council will allow payment of the Community Infrastructure Levy (CIL) required by the adopted charging schedule as follows:

Amount of CIL Liability	Number of Instalment Payments	Amount or proportion of CIL payable in any instalment/time at which payments are due
£100,000 or less	No instalments	Total amount payable within 60 days of commencement of development
£100,001 or more	Two	<ul style="list-style-type: none">• The greater of £100,000 or half the value of the total amount payable within 60 days of commencement of development• The remainder within 240 days of commencement of development

Agenda Item 10

COUNCIL			
Report Title	Review of the Lewisham Agreed Syllabus for religious education 2018		
Key Decision	Yes	Item No.	
Ward	All		
Contributors	Executive Director for Children and Young People		
Class	Part 1	Date:	18 July 2018

1. Summary

- 1.1 This report summarises the work of the Agreed Syllabus Conference (ASC) and seeks approval for the new Lewisham Agreed Syllabus for religious education 2018. The Syllabus is attached as Appendix 2.

2. Recommendations

- 2.1 The Mayor and Cabinet reviewed the Lewisham Agreed Syllabus for religious education 2018 for use in Lewisham schools on 27th June 2018 and agreed it prior to this being presented to Council for final approval.

3. Policy Context

- 3.1 In 2015, the Standing Advisory Council on Religious Education (SACRE) requested that the Local Authority (LA) establish an Agreed Syllabus Conference (ASC) to revise the 2009 syllabus and draft a new Agreed Syllabus for Religious Education (RE) for Lewisham schools. All Local Authorities are required by statute to undertake this activity in line with Section 375 of the Education Act 1996.
- 3.2 Whilst the ASC is a standalone body set up specifically to undertake this piece of work, the group has developed the syllabus in accordance with the following Corporate Priorities:

community leadership and empowerment – the ASC is comprised of local religious and faith group leaders who have worked together to develop an appropriate religious education syllabus for the children and young people of Lewisham.

young people's achievement and involvement – the ASC listened to the views of young people (working with the Young Mayor's Advisors) and to school teachers and leaders (who are represented on the ASC)

- 3.3 The syllabus also reflects a number of specific aspects of Lewisham's Community Strategy including:

Ambitious and achieving – the syllabus provides comprehensive programmes of study for all children and young people from Reception to post-16. The syllabus advises all schools to ensure that all children and young people study for a GCSE in RE during Key Stage 4.

Safer – The content of the syllabus has been specifically designed to ensure all children and young people have access to learning about a wide range of different faiths and beliefs, which are reflective of the communities in which they live as well as national and international/global experiences. This syllabus will support all schools in Lewisham to ensure that they are providing spiritual, moral, social and cultural (SMSC) development in accordance with fundamental British values. *“Pupils must be encouraged to regard people of all faiths, races and cultures with respect and tolerance”* (see: https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/380595/SMSC_Guidance_Maintained_Schools.pdf).

Empowered and responsible – The syllabus will equip children and young people in Lewisham with knowledge and understanding about a wide range of different faiths, beliefs and cultures whilst enabling them to explore their own beliefs and attitudes. This will help our children and young people to be empowered and responsible citizens

4. Background

- 4.1 Every maintained school in England must provide a basic curriculum covering religious education (RE), sex education and the National Curriculum. This includes provision for RE for all registered pupils at the school (including those in the sixth form), except for those withdrawn by their parents (or withdrawing themselves if they are aged 18 or over) in accordance with Schedule 19 to the School Standards and Framework Act 1998. The key document in determining the teaching of RE is the locally Agreed Syllabus within the LA concerned.
- 4.2 The ASC has met on a number of occasions since 7 July 2015 and has included a wide representation of local faith leaders to support and agree the content for the syllabus. Contributors to the development of the Syllabus can be found at Appendix 1. All the agendas, papers and minutes for ASC meetings are available on the

council's website (see <http://councilmeetings.lewisham.gov.uk/ieListMeetings.aspx?CId=341&Year=0>) along with the membership of the ASC. The final proposed syllabus was agreed in May 2018.

5. Financial Implications

This will be the first Agreed Syllabus maintained entirely online. This will reduce the cost of production and distribution. The costs of developing and publishing the syllabus will be met from within existing budgets. There are no further material financial implications from this decision

6. Legal implications

- 6.1 Local authorities must ensure that the Agreed Syllabus for their area is consistent with Section 375 (3) of the Education Act 1996, which requires the syllabus to reflect the religious traditions of Great Britain, which are in the main Christian, whilst taking account of the teaching and practices of the other principal religions represented in Great Britain.
- 6.2 The Equality Act 2010 (the Act) introduced a public sector equality duty (the equality duty or the duty). It covers the following protected characteristics: age, disability, gender reassignment, marriage and civil partnership, pregnancy and maternity, race, religion or belief, sex and sexual orientation.
- 6.3 In summary, the Council must, in the exercise of its functions, have due regard to the need to:
- eliminate unlawful discrimination, harassment and victimisation and other conduct prohibited by the Act.
 - advance equality of opportunity between people who share a protected characteristic and those who do not.
 - foster good relations between people who share a protected characteristic and those who do not.
- 6.4 It is not an absolute requirement to eliminate unlawful discrimination, harassment, victimisation or other prohibited conduct, or to promote equality of opportunity or foster good relations between persons who share a protected characteristic and those who do not. It is a duty to have due regard to the need to achieve the goals listed at 8.4 above.
- 6.5 The weight to be attached to the duty will be dependent on the nature of the decision and the circumstances in which it is made. This is a matter for the Mayor, bearing in mind the issues of relevance and proportionality. The Mayor must understand the impact or likely impact of the decision on those with protected characteristics who are potentially affected by the decision. The extent of the duty will

necessarily vary from case to case and due regard is such regard as is appropriate in all the circumstances.

- 6.6 The Equality and Human Rights Commission has issued Technical Guidance on the Public Sector Equality Duty and statutory guidance entitled “Equality Act 2010 Services, Public Functions & Associations Statutory Code of Practice”. The Council must have regard to the statutory code in so far as it relates to the duty and attention is drawn to Chapter 11 which deals particularly with the equality duty. The Technical Guidance also covers what public authorities should do to meet the duty. This includes steps that are legally required, as well as recommended actions. The guidance does not have statutory force but nonetheless regard should be had to it, as failure to do so without compelling reason would be of evidential value. The statutory code and the technical guidance can be found at:

<https://www.equalityhumanrights.com/en/advice-and-guidance/equality-act-codes-practice>

<https://www.equalityhumanrights.com/en/advice-and-guidance/equality-act-technical-guidance>

- 6.7 The Equality and Human Rights Commission (EHRC) has previously issued five guides for public authorities in England giving advice on the equality duty:

- [The essential guide to the public sector equality duty](#)
- [Meeting the equality duty in policy and decision-making](#)
- [Engagement and the equality duty: A guide for public authorities](#)
- [Objectives and the equality duty. A guide for public authorities](#)
- [Equality Information and the Equality Duty: A Guide for Public Authorities](#)

- 6.8 The essential guide provides an overview of the equality duty requirements including the general equality duty, the specific duties and who they apply to. It covers what public authorities should do to meet the duty including steps that are legally required, as well as recommended actions. The other four documents provide more detailed guidance on key areas and advice on good practice. Further information and resources are available at:

<https://www.equalityhumanrights.com/en/advice-and-guidance/public-sector-equality-duty-guidance#h1>

7. Crime and Disorder Implications

- 7.1 There are no crime and disorder implications relevant to this report.

8. Equalities Implications

- 8.1 Religious education contributes to promoting fundamental British Values and to supporting community cohesion. The draft Syllabus has involved multi faith working and the result reflects the vibrant diversity of Lewisham. The group that wrote this curriculum were at pains to ensure that all aspects of equalities and diversity are respected in the document.

9. Environmental Implications

- 9.1 There are no specific environmental implications. As it is proposed to have the new syllabus as an online document, there is minimal environmental impact, e.g. no printed paper.

Appendices

Appendix 1	Contributors to the development of the Syllabus
	Lewisham Agreed Syllabus for religious education
Appendix 2A	Introduction
Appendix 2B	Early Years Foundation Stage
Appendix 2C	Key Stage 1 & 2 Faith Content
Appendix 2D	Key Stage 1 Units
Appendix 2E	Key Stage 2 Units
Appendix 2F	Key Stage 3 Statutory Units
Appendix 2G	Key Stage 3 Optional Units
Appendix 2H	Key Stage 4
Appendix 2I	Key Stage 5
Appendix 2J	Glossaries
Appendix 2K	Appendices

If there are any queries on this report please contact Suhaib Saeed on 020 8314 7670.

Contributors to the Development of the Syllabus

MEMBERS OF THE AGREED SYLLABUS CONFERENCE

APPENDIX 1

The following have served on the Agreed Syllabus Conference for all or some of its work

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Free Churches	Pastor Nick Hughes, Jeronne Rudder
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Free Churches	Rev Raymond Singh
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ATL / NEU	Kim Knappett Chair 2017 / 2018
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NAS/UWT	Pamela Phillips
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LA elected members	Councillor Jacq Paschoud, Councillor David Britton Chair 2015 / 2017, Councillor Janet Daby, Councillor Hilary Moore,
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Learning Together Through Faith and Beliefs

Contributors to the Development of the Syllabus

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Introduction

The importance of religious education

The contribution of religious education to the school curriculum

The legal position

The aims of religious education in Lewisham schools

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Introduction

The importance of religious education

'The United Kingdom has a rich heritage of culture and diversity. This is continuing today in an era of globalisation and an increasingly interdependent world. Religion and belief for many people forms a crucial part of their culture and identity. Religion and beliefs have become more visible in public life locally, nationally and internationally. The impact of religion on society and public life is constantly brought to public attention through extensive media coverage. The rapid pace of development in scientific and medical technologies and the environmental debate continue to present new issues, which raise religious, moral and social questions. The internet enables learning and encourages participation in public discussion of issues in a new and revolutionary way.' (Religious education guidance in English schools: Non-statutory guidance 2010)

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Religious education provokes challenging questions about the ultimate meaning and purpose of life, beliefs about God, the self and the nature of reality, issues of right and wrong and what it means to be human. It develops pupils' knowledge and understanding of Christianity, other principal religions, other religious traditions and other worldviews that offer answers to questions such as these. It offers opportunities for personal reflection and spiritual development. It enhances pupils' awareness and understanding of religions and beliefs, teachings, practices and forms of expression. It also explores the influence of religion on individuals, families, communities and cultures.

Religious education encourages pupils to learn from different religions, beliefs, values and traditions while exploring their own beliefs and questions of meaning. Religious education encourages pupils to develop their sense of identity and belonging. It challenges pupils to reflect on, consider, analyse, interpret and evaluate issues of truth, belief, faith and ethics and to communicate their responses. It enables them to flourish individually within their communities and as citizens in a pluralistic society and global community.

Religious education has an important role in preparing pupils for adult life, employment and lifelong learning. It enables pupils to develop respect for and sensitivity to others, in particular those whose faiths and beliefs are different from their own. It promotes discernment and enables pupils to combat prejudice.

Introduction

The contribution of religious education to the school curriculum - supporting the values of the curriculum

Religious education actively promotes the values of truth, justice, respect for all and care of the environment. It places specific emphasis on:

- pupils valuing themselves and others;
- the role of family and the community in religious belief and activity;
- the celebration of diversity in society through understanding similarities and differences; and
- sustainable development of the earth.

Religious education also recognises the changing nature of society, including changes in religious practice and expression, and the influence of religion in the local, national and global community.

Supporting the aims of the curriculum

Aim 1: The school curriculum should aim to provide opportunities for all pupils to learn and achieve.

Religious education should be a stimulating, interesting and enjoyable subject. The knowledge, skills and understanding in this syllabus are designed to promote the best possible progress and attainment for all pupils. It develops independent and interdependent learning and makes an important contribution to pupils' skills in literacy and Information and Communication Technology (ICT).

Religious education promotes an enquiring approach in which pupils carefully consider issues of beliefs and truth in religion. It also enhances the capacity to think coherently and consistently. This enables pupils to evaluate thoughtfully their own and others' views in a reasoned and informed manner.

Introduction

Aim 2: The school curriculum should aim to promote pupils' spiritual, moral, social and cultural development and prepare all pupils for the opportunities, responsibilities and experiences of life.

At the heart of this Agreed Syllabus for religious education is a focus on developing a reflective approach to life and engaging with ultimate questions and ethical issues. This focus enables pupils to appreciate their own and others' beliefs and cultures and how these impact on individuals, communities, societies and cultures.

Religious education seeks to develop pupils' awareness of themselves and others. This helps pupils to gain a clear understanding of the significance of religions and beliefs in the world today and learn about the ways different faith communities relate to each other. A major objective of the Agreed Syllabus is to promote religious understanding, discernment and respect whilst challenging prejudice and stereotyping.

Religious education is committed to exploring the significance of the environment, both locally and globally, and the role of human beings and other species within it.

A central concern of religious education is the promotion of each pupil's self-worth. A sense of self-worth helps pupils to reflect on their uniqueness as human beings, share their feelings and emotions with others and appreciate the importance of forming and maintaining positive relationships.

The legal position

Religious education must be taught to all registered pupils in maintained schools, including those in the sixth form, except to those withdrawn by their parents. This requirement does not apply to nursery classes in maintained schools.

Religious education is a component of the basic curriculum, to be taught alongside the National Curriculum in all maintained schools, other than voluntary aided schools with a religious character. It must be taught according to a locally agreed syllabus. Each Local Authority (LA) must by law convene an Agreed Syllabus Conference to produce a syllabus. Once adopted by the LA, the programme of study of the local agreed syllabus sets out what pupils should be taught.

Introduction

The Education Act 1996 states that an agreed syllabus must reflect the fact that the religious traditions in Great Britain are in the main Christian, while taking account of the teachings and practices of the other principal religions represented.

Each LA must have a Standing Advisory Council on Religious Education (SACRE). The SACRE may require a review of the agreed syllabus at any time. This is in addition to the requirement on LAs to convene a conference to reconsider the agreed syllabus every five years.

The aims of religious education in Lewisham schools

Religious education in schools celebrates the diversity of religious and human experience. It encourages pupils to grow with the knowledge, skills, sensitivity and understanding to develop as confident and productive members of their local multi-faith community and the world.

Religious education should help pupils to:

- develop a positive attitude towards living in a society of many religions and beliefs, respecting others right to hold different beliefs from their own;
- acquire and develop knowledge and understanding of Christianity and the other principal religions and non-religious world views represented in Great Britain;
- develop an understanding of the influence of beliefs, values and traditions on individuals, communities, societies and cultures;
- develop the ability to make reasoned and informed judgements about religious and moral issues, with reference to their own beliefs and the teachings of the principal religions and beliefs represented in Great Britain; and
- enhance their spiritual, moral, social and cultural development by:
 - developing awareness of the fundamental questions of life raised by human experiences, and how religious teachings and philosophies can relate to them;
 - responding to such questions with reference to the teachings and practices of religions and to their own understanding and experience; and
 - developing the ability to reflect on their own beliefs, values and experiences in the light of their study.

Introduction

Fundamental British values

Schools should promote the fundamental British values of **democracy**, the **rule of law**, **individual liberty**, and **mutual respect and tolerance of those with different faiths and beliefs**.

Ofsted stated in the *School inspection handbook 2015*: “RE contributes to spiritual, moral, social and cultural development of all children and young people when taught well in schools, and through this makes a significant contribution to helping pupils develop and demonstrate skills and attitudes that will allow them to participate fully in and contribute positively to life in modern Britain.”

Through practising the skills of tolerance and mutual respect as seen in fundamental British values, religious education provides schools with opportunities to develop pupils learning, understanding around people they will meet, work and live alongside. It can help schools build up resilience skills within the lives of children and young people.

Introduction

Time allocation

The Agreed Syllabus is based on the expectation that 5% of curriculum time which equates to the following hours, should be devoted to religious education:

Key Stage 1	36 hours per year
Key Stage 2	45 hours per year
Key Stage 3	45 hours per year
Key Stage 4	Adequate time to deliver an accredited examination course for all pupils
Key Stage 5	18 hours per year.

Using the Agreed Syllabus

The agreed syllabus should be used by:

- Headteachers and governing bodies in ensuring adequate provision for religious education that meets statutory requirements
- subject leaders in drawing up their school's scheme of work
- head teachers and subject leaders in ensuring progression in pupils' learning
- governors who have responsibility for religious education development
- faith leaders and members when looking to understand the nature and content of religious education in our schools
- parents who wish to learn more about the nature and content of religious education in schools



Religious Education in the Early Years Foundation Stage

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Religious Education in the Early Years Foundation Stage

Background

The Early Years Foundation Stage (EYFS) framework focuses on children from birth to the end of the reception year. For the purpose of this document, we are referring to the later part of the EYFS, namely children aged from 3 to 5 who are in a school setting for Nursery or Reception. It is, however, adaptable for all settings with children in the EYFS.

Religious education is statutory for all pupils registered on the school roll. The statutory requirement for religious education does not extend to nursery classes in maintained schools and is not, therefore, a legal requirement for much of the Foundation Stage. It may, however, form a valuable part of the educational experience of children throughout the EYFS.

The aim of preparing this guidance is to help practitioners working with young children to provide appropriate personal, social and emotional experiences which will support the development of their understanding of the place of religion and beliefs in people's lives. This syllabus draws upon the principles that underpin the EYFS Framework:

- **quality and consistency** in all early years settings, so that every child makes good progress and no child gets left behind;
- **a secure foundation** through learning and development opportunities which are planned around the needs and interests of each individual child and are assessed and reviewed regularly;
- **partnership working** between practitioners and with parents and/or carers; and
- **equality of opportunity** and anti-discriminatory practice, ensuring that every child is included and supported.

The EYFS specifies requirements for learning and development and for safeguarding children and promoting their welfare. The learning and development requirements cover:

- the areas of learning and development which must shape activities and experiences (educational programmes) for children in all early years settings;
- the early learning goals that providers must help children work towards (the knowledge, skills and understanding children should have at the end of the academic year in which they turn five); and
- assessment arrangements for measuring progress (and requirements for reporting to parents and/or carers).

The safeguarding and welfare requirements cover the steps that providers must take to keep children safe and promote their welfare.



Religious Education in the Early Years Foundation Stage

British Values

The government has stated that promoting British values is part of the early years curriculum. This means that as part of Ofsted's inspections, early years providers will be inspected on how these values are promoted within the setting. According to Department for Education, the fundamental British values can be broken down as:

- Democracy
- The rule of law
- Individual liberty
- Mutual respect and tolerance of different faiths and beliefs

British values should be included in the whole curriculum. The children in early years settings live in an increasingly diverse society and this guidance will support encouraging them to learn that it is possible to live together peacefully, each of them a valuable part of our multicultural world. It is important to work closely with parents and communities and the ideas in this guidance will support making those links and delivering a broad provision.

British values are embedded in the curriculum of an early years setting when children learn to be kind, helpful and respectful of others, to be part of their local community and to appreciate that it is acceptable to have a group where people believe different things and that they can support and respect each other in those different beliefs.

In finding out about those times that are special to themselves and others and in learning to work together and accommodate different needs we are laying foundations that can be built on in the Key Stages to follow.



Religious Education in the Early Years Foundation Stage

Overarching principles

Four guiding principles should shape practice in early years settings. These are:

- every child is a unique child, who is constantly learning and can be resilient, capable, confident and self-assured;
- children learn to be strong and independent through positive relationships;
- children learn and develop well in enabling environments, in which their experiences respond to their individual needs and there is a strong partnership between practitioners and parents and/or carers; and
- children develop and learn in different ways and at different rates. The framework covers the education and care of all children in early years provision, including children with special educational needs and disabilities.

The areas of learning and development

There are seven areas of learning and development that must shape educational programmes in early years settings, which are important and interconnected. Three areas are particularly crucial for igniting children's curiosity, enthusiasm for learning and for building their capacity to learn, form relationships and thrive. These three prime areas are:

- communication and language;
- physical development; and
- personal, social and emotional development.

The other four specific areas are:

- literacy;
- mathematics;
- understanding the world; and
- expressive arts and design.

Our guidance provides suggestions for ways in which practitioners can both create an environment and also plan activities which help children to further understand the world around them through Religious Education.



Religious Education in the Early Years Foundation Stage

Introduction

During the Foundation Stage, children begin to explore the world of religion in terms of special people, books, times, places, objects and visiting places of worship. Children listen to, and talk about, stories. They are introduced to specialist words and use their senses in exploring religious beliefs, practices and forms of expression. They reflect upon their own feelings and experiences. They use their imagination and curiosity to develop their appreciation and wonder of the world in which they live.

It is important for young children to approach early experiences related to religious education with open attitudes and interest and to feel free to talk about the place of religious experience in their own lives. In order that this can happen it is necessary to foster an environment within each setting where children can appreciate that everyone is of equal importance, where diversity is celebrated and where children can develop an understanding that the needs of everyone should be treated fairly and equally. Within such a learning environment, cultural and religious diversity is regarded as positive and children can feel that they are able to express their viewpoints and beliefs in safety.

The resources and experiences that are suggested in this document are meant to support and protect the home cultures and beliefs of every child. This syllabus explores five areas of development for the EYFS where careful resourcing and consideration for religious education outcomes can enable ordinary classroom opportunities to significantly develop foundations for Key Stage 1. Each aspect should be an integral part of early experiences and often two or more aspects may occur simultaneously.

In line with the principles of the EYFS, it is strongly recommended that all planning and provision should be relevant and begin with the child and their personal/real experiences. It is vital that practitioners become aware of the individual child and the child's significant and unique experiences, in order that all activities and learning opportunities are relevant.

Play is essential for child development, building their confidence as they learn to explore, to think about problems, and relate to others. Children learn by leading their own play, and by taking part in play which is guided by adults. The religious education curriculum must be implemented through planned, purposeful play and through a mix of adult-led and child-initiated activities. By providing a safe climate, experiences can be shared and learning can move forward as children become aware of the community around them and their place in it.

Practitioners wishing to decide which faiths and beliefs to include in their classroom planning should primarily consider the need for very young children to recognise their home backgrounds and see them acknowledged and celebrated in the school environment. They should therefore take those faiths and beliefs to which the children in their group belong as their starting point and be prepared to be flexible and responsive in their planning to meet the needs of each particular cohort.



Religious Education in the Early Years Foundation Stage

If this way of selecting which faiths and beliefs to focus on proves unhelpful, practitioners should discuss with Key Stage 1 colleagues those faiths and beliefs which will be studied and encountered in Years 1 and 2 and decide on some or all of these as their starting point in order to avoid confusing the children with too wide a range of faiths and beliefs with which they are unfamiliar.

Festivals celebrated by members of the school community that feature in the programme planned for the school or in the classroom will provide many opportunities to help children to begin to develop connections between faiths, beliefs, festivals, key figures, places, stories and symbols. As they talk about the story associated with each festival and the way in which the festival is celebrated, children should be beginning to connect festivals to their faith or belief context. For example, it is important that children learn that Christmas is a Christian festival celebrated by Christians.

Adults find stories are powerful vehicles for developing ideas and concepts and promoting discussion. It is however not always helpful to trawl the Bible and the traditions of other faiths and beliefs for stories in the hope that they will provide useful religious education starting points. Within an Agreed Syllabus there are focused occasions for the use of such stories which have been carefully planned in discussion with their relevant communities. The introduction of such stories at earlier stages would not prove helpful to the children.

To help practitioners in their choice of stories to use for these religious education foundations for the EYFS, example booklists have been provided within this advice in order to support the development of the four aspects of personal development. The books on the booklists are not meant to be set texts and these are not exhaustive lists, they merely demonstrate a wide range of possibilities for development within some well-known texts. Practitioners will all have other favourites which they will wish to add or use instead to provide similarly useful opportunities.



Religious Education in the Early Years Foundation Stage

The Five Areas of Development

Practitioners need to ensure that they cater for all Five Areas across each year group in this stage.





Religious Education in the Early Years Foundation Stage

Festivals

Alongside the four other aspects of personal, social and emotional development referred to in this advice, practitioners will wish to make a focus on some festivals during the year. It is important to decide which festivals and which faiths and beliefs to include, taking into consideration the need for very young children to recognise their home backgrounds celebrated in their school environment. Therefore take those communities to which the children in the group belong as a starting point. Here are some principles that should be considered when selecting festivals to include:

- ◆ Be aware of the cultures, faiths and beliefs represented within your setting.
- ◆ Select a limited and balanced number of festivals over the year. This should be between 3 – 6 festivals per year.
- ◆ Plan festival focuses at the appropriate time of year to help children to make sense of their own experiences.
- ◆ Be clear about the faith or belief to which each festival belongs.
- ◆ Introduce the story attached to the festival at an appropriate level for the children.
- ◆ Enable children to appreciate that a festival is a celebration whilst ensuring that you do not give them or their carers the impression that they are being asked to participate at the level of a member of a faith community
- ◆ Be clear about what you want the children to gain from the experience - refer to Development Matters and the subsequent Early Learning Goals and EYFS Framework. Is this work relevant and meaningful?
- ◆ If you intend inviting children to share foods related to festivals take the opportunity to talk about any food restrictions and laws which relate to the faith concerned and ensure that you are aware of the food laws adhered to by members of the group so that you do not offend or confuse.
- ◆ The ways in which people celebrate the festival should be clearly referenced to the faith and cultural tradition - e.g. the making of Diwali cards should be an opportunity to investigate and use Indian or Hindu art and symbol.
- ◆ Be alert to the need to avoid racial, cultural and gender stereotyping.
- ◆ Where possible, involve members of the relevant community so that children realise the festival is really celebrated by real people.

Practitioners and community representatives should be careful that they are clear about the level at which they should approach these areas with young children. They should appreciate that involvement is not an opportunity to convert or engage children in activities more appropriate to members of the focus faith community.

A festival planner follows - this is to help practitioners to ensure that they have addressed all the necessary issues and help to provide some depth of experience. There is also a blank booklist for settings to complete with resources they find successful and relevant to them.



Religious Education in the Early Years Foundation Stage

Booklist: Festivals		
Title, Author, etc	What is it about?	Possible themes

Festival planner: some things to consider	
Festival name and symbol	Faith/culture / belief group ◆ Are there any members of this group in your setting?
When will I celebrate the festival? ◆ How does this fit into your planning over the year? ◆ It is important to focus on this festival at the relevant time of the year.	
What will the children gain from this experience? ◆ Make links to Development Matters, Early Learning Goals and EYFS Framework	
Who from the learning community will be able to contribute? How? ◆ Consider staff, children, parents/carers, community leaders.	
What story and resources will I need? ▪ Consider health and safety issues. ▪ Be clear about the story characters, locations and names of artefacts.	Key vocabulary ▪ The vocabulary will need to be accurate and appropriate to the children in your setting
What will happen? ◆ Key activities/experiences/opportunities/ dates/times	What does it mean? • This might look at any symbolism or inner meanings that are appropriate
Things I have found useful for future planning • Information, resources etc.	



Religious Education in the Early Years Foundation Stage

Self and others

Children should know and understand: about their own culture and beliefs and those of other people; that there are differences between people and that different does not mean better or worse

Expected Outcome	Look, listen and note	Examples of activities, opportunities and experiences
<ul style="list-style-type: none"> ◆ To enable children to raise their self-esteem and value themselves ◆ For the children to develop sensitivity and respect towards others ◆ For the children to develop a sense of belonging 	<ul style="list-style-type: none"> ◆ Developing a sense of what it is to be members of a variety of beliefs. ◆ Children can express their own beliefs comfortably in a supportive environment and where having beliefs is acceptable. ◆ Developing awareness and respect for the range of beliefs, traditions and customs in the group and the wider society. 	<ul style="list-style-type: none"> ◆ Role - play area reflects different cultures, beliefs and lifestyles through e.g. costumes, dress, decorations, dolls, utensils, musical instruments. ◆ Dual language songs/books available and used with a particular religious education aim, e.g. for raising self esteem through the celebration of personal language, faith, belief and culture, and raising awareness that there are different texts used in books. ◆ Displays reflecting a range of cultures and beliefs. ◆ Use of stories <ul style="list-style-type: none"> ▪ from a range of cultures/faith backgrounds ▪ to develop self-worth ▪ for a purpose behind the story either as a story demonstrating a culture/faith background or about a festival/celebration or containing concepts which may need to be developed such as the idea of a special place. ◆ Encouraging support from parents/carers from all faiths and cultures.

AREAS OF LEARNING LINKS: Three prime areas of learning; personal, social and emotional development, communication and language and physical development should be identified. Four specific areas in which the prime skills are applied: literacy, mathematics, expressive arts and design, and understanding the world.

How does this link with KS1 R.E?

- Understanding that religious belief is an important part of some people's lives
- Familiarity with dress, food, celebrations related to different faiths
- Understanding that books can be written in different languages as a foundation for studying holy books

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Religious Education in the Early Years Foundation Stage

Example Booklist: self and others

Title, Author, etc	What is it about?	Possible themes
<i>All the colours of the earth</i> by Sheila Hamanaka Published by Morrow 0-688-11131-9	Human diversity - glorying in the range of people in the world through its children.	Difference
<i>Amber's other grandparents</i> by Peter Bonnici Published by Bodley Head 0-370-30671-6	A little girl from a mixed race family meeting one set of grandparents for the first time.	Who am I? Families
<i>Jennifer has two daddies</i> by P. Galloway Published by Women's press 0-88961-095-9	A story about step-families and how a little girl comes to terms with understanding that both her fathers love her.	Families Relationships
<i>Clever Sticks</i> by Bernard Ashley Published by Collins	Human diversity - being clever	Individual worth
<i>Nothing</i> by Mick Inkpen Published by Hodder 0-340-65674-	A sense of belonging	Everyone is important
<i>Tell me again about the night I was born</i> by Jamie Lee Curtis, Scholastic 0-590-111477	Living in different family units – adoption	Families Relationships
<i>Loving</i> by Ann Morris Published by Mulberry Books 0 068811361 33	A book showing loving relationships around the world	Families World family
<i>The best loved bear</i> by Diana Noonan Published by Picture Hippo 0-590-55851-X £3.99	All the children bring their bears for the competition - which one will win?	Special things Love
<i>Something Else</i> by Kathryn Cave & Chris Riddell Puffin 0-14-054907-2	Being different and belonging.	Difference
<i>Amazing Grace</i> by Hoffman & Binch Frances Lincoln 0-7112-0699-6	Grace learns about challenging the barriers of difference	Gender, race



Religious Education in the Early Years Foundation Stage

Symbolism and rituals

Children should know and understand : the *symbolism and rituals* which are part of everyday life

Expected Outcomes	Look, listen and note	Examples of activities, opportunities and experiences
<ul style="list-style-type: none"> ◆ To enable the children to understand and appreciate that there are a variety of ways in which people live their lives. ◆ To give children the opportunity to talk about why certain rituals are part of every day life and their values (e.g. washing hands before meals). ◆ To enable the children to share how they live their lives and to learn to accept that there are many ways in which life may be lived. ◆ To help the children learn that there are symbols which help people to lead their lives e.g. green and red men on the crossing. 	<ul style="list-style-type: none"> ◆ Children understand that some members of the group have rituals in their lives which have religious meaning. ◆ Children should see and understand that some symbols relate particularly to faith communities, e.g. outside a place of worship telling you the purpose of that building. 	<ul style="list-style-type: none"> ◆ Provide opportunities to talk about everyday routines that we perform as individuals or in groups, e.g. bedtime rituals or family prayers. ◆ Provide photographs and symbols around the room to develop awareness that symbols convey meanings. ◆ Focus on rituals associated with festivals, including foods. ◆ Discuss preparation rituals necessary before different activities e.g. aprons on before sand/wet play. ◆ Share stories about getting ready for festivals/ family celebrations. ◆ Possibly visit a place of worship to find out about a faith/family ritual e.g. a wedding.

AREAS OF LEARNING LINKS: Three prime areas of learning; personal, social and emotional development, communication and language and physical development should be identified. Four specific areas in which the prime skills are applied: literacy, mathematics, expressive arts and design, and understanding the world.

How does this link with KS1 R.E?

- Rituals in religions, importance of 'being clean' before worship.
- Understanding that different religions have different rituals.
- Recognising that some practices are expressed differently in different religions, e.g. welcoming ceremonies.
- Understanding that religious symbols relate to different religions.

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Religious Education in the Early Years Foundation Stage

Example Booklist: symbolism and rituals

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Title, Author, etc	What is it about?	Possible themes
<i>Welcoming babies</i> by M B Knight Published by Tilbury House 0-88448-123-9	How special babies are and how they are greeted cross the world and in different faiths	Special times
<i>The Red Woollen Blanket</i> by Bob Graham Published by Walker 0-7445-1132 1	The relationship between a little girl and her comforter.	Special things
<i>Chatting</i> by Shirley Hughes Published by Walker 0 7445 3248 5	Importance of bedtime ritual	Special times routines
<i>Rhymes around the day</i> by Jan Ormerod Published by Kestrel 0-7226 5808	The day told through rhyme and pictures	Everyday rituals
<i>Lights for Gita</i> by Rachna Gilmore Published by Second Story Press 0-929005-61-9	Gita celebrates her festival of light	Special times
<i>Can't You Sleep Little Bear?</i> by Martin Waddell Published by Walker 07445 1316 2	The baby bear's bedtime rituals	Special times in the day
<i>Peepo</i> by Janet & Allan Ahlberg Published by Picture Puffin 0-14-050384-6	Going through the baby's day	Routines
<i>Eat Up Gemma</i> by Sarah Hayes Published by Walker 07445-13228-6	Mealtimes when Gemma doesn't want to eat her dinner	Routines
<i>Lucy's Sunday</i> by Margaret Barratt Published by Heinemann 0 435 30401 1	How Lucy and her family spend every Sunday	Special times



Religious Education in the Early Years Foundation Stage

Living things

Children should know and understand: *the significance of living things*

Expected Outcomes	Look, listen and note	Examples of activities, opportunities and experiences
<ul style="list-style-type: none"> ◆ To encourage children to learn about their world. ◆ To help the children develop a sense of the pattern in nature. ◆ Children to further develop knowledge and understanding of living things and have the opportunity to look closely at similarities, differences, pattern & change. ◆ For the children to develop a caring and responsible attitude to living things. ◆ Children to be provided with opportunities to experience awe & wonder. 	<ul style="list-style-type: none"> ◆ Children to begin to reflect on attitudes to life, living things and the world. ◆ Children begin to become aware of the cycle of life and death. ◆ Children respond to significant experiences, showing a range of feelings. ◆ Children develop caring attitudes. 	<ul style="list-style-type: none"> ◆ Provide a range of natural objects reflecting seasonal and growth changes, life and death. ◆ Create opportunities to plant, observe and care for living things. ◆ Organise visits to school grounds, parks gardens, farms etc. ◆ Display attractive posters and books. ◆ Use natural things in the classroom wherever possible. ◆ Tell stories relating to care of pets, plants and the natural world.

AREAS OF LEARNING LINKS: Three prime areas of learning; personal, social and emotional development, communication and language and physical development should be identified. Four specific areas in which the prime skills are applied: literacy, mathematics, expressive arts and design, and understanding the world.

How does this link with KS1 R.E?

- KS1 work on Faith beliefs about respect for nature and all life.
- Beliefs regarding the creation of the world.



Religious Education in the Early Years Foundation Stage

Example Booklist: living things

Title, Author, etc	What is it about?	Possible themes
<i>God's world makes me feel so little</i> by Helen Caswell Published by Scripture Union 0-86201-501-4	Tiny Creatures	Wonder of the world
<i>The world that Jack built</i> by Ruth Brown Published by Anderson Press 0-86264-269-8	Pollution	Caring for the world
<i>Dogger</i> by Shirley Hughes Published by Picture Lion 0 00 661464 7	Dave loses Dogger - his favourite toy. How will he cope?	Loss Sacrifice
<i>Leaving Mrs. Ellis</i> by C. Robinson Published by Bodley Head 0-370-31856-0	Anxieties about moving on from a well-known teacher	Loss Special people
<i>Come back Grandma</i> by Sue Limb Published by Bodley Head 0-370-31807-2	How much Grandma is missed and the links of family relationships	Loss Special people
<i>I'll always love you</i> by Hans Wilhelm Published by Hodder & Stoughton 0-340-401532	How much a relationship continues to matter after a bereavement.	Special relationships Loss
<i>In the small, small pond</i> by Denise Fleming Published by Red Fox 0 09 943181 5	A small pond but very busy	Diversity of nature
<i>The very worried sparrow</i> by Meryl Doney Published by Scripture Union 0 7459 23445	The sparrow worries about so many things and then discovers that God has been looking after everything all the time.	Everything in nature is important Changes
<i>The very hungry caterpillar</i> by Eric Carle Published by Puffin 0 14 050087 1	The miracle of growth and change	
<i>Lucy's Rabbit</i> by Jennifer Northway Published by Picture Hippo 0-590-13546-5	Looking after a Rabbit	Caring for animals



Religious Education in the Early Years Foundation Stage

Right and wrong, fairness and justice

Children should know and understand: about *right and wrong and fairness and justice*

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Expected outcomes	Look, listen and note	Examples of activities, opportunities and experiences
<ul style="list-style-type: none"> ◆ To encourage children to understand that there need for agreed values and codes of behaviour for groups of people. ◆ To encourage the development of appropriate behaviour patterns. ◆ To encourage self-discipline. ◆ To help children to explore and express their feelings and interact positively with each other. ◆ For the children to foster the development of a sense of responsibility. ◆ To help children to realise the effect of their words and actions on themselves and others 	<ul style="list-style-type: none"> ◆ Children develop respect for themselves and each other. ◆ Developing respect for each other's property e.g. by discussion about looking after equipment and reasons why ◆ Children will begin to learn about different rules e.g. faith rules ◆ Children to begin to find out how faith communities work. ◆ Children to develop positive attitudes towards faith rules e.g. those about food laws or faith dress conventions. 	<ul style="list-style-type: none"> ◆ Create opportunities for sharing and taking turns e.g. in games or on outside equipment. ◆ When playing games, encouraging an understanding that they won't always win. ◆ Provide adult intervention to encourage a sense of responsibility by challenging, praising, rewarding and reminding about behaviour. ◆ Verbalise everyday rules e.g. 'their turn now' to establish reasons for behaviour. ◆ Encouraging children to say sorry when necessary and to accept apologies from others readily. ◆ At festival times share foods appropriate to the faith and talk about those foods that are not permitted. ◆ Try on religious dress items (e.g. prayer hats) and talk about why they are worn.

AREAS OF LEARNING LINKS: 1 prime - Personal, Social and Emotional Development; 1 specific - Understanding of the World

How does this link with KS1 R.E?

- Understanding that communities have rules and that when rules are broken you make yourself and other people unhappy.
- Early knowledge of some faith rules e.g. do not steal.



Religious Education in the Early Years Foundation Stage

Example Booklist: right and wrong, fairness and justice

Title, Author, etc	What is it about?	Possible themes
<i>The Lost Sheep</i> by Butterworth & Inkpen Published by Harper Collins 0-55-102873-4	Story told by Jesus as a parable. A shepherd loses a sheep and searches everywhere until he finds it.	Everyone's important Lost & found
<i>Jamaica's Find</i> by Juanita Havill Published by Little, Mammoth 0-7497-0190-0	A little girl finds a toy and is uncertain what to do next.	Ownership Selflessness
<i>Janine and the new baby</i> by Iolette Thomas Published by Andre Deutsch 0 233 97916-6	Preparation for a new baby and then visiting it when it arrives.)belonging)Families,)Relationships)Feeling left out
<i>Will there be a lap for me?</i> by D. Corey Published by 0807591106	Anxieties before the new baby arrives	
<i>Bad tempered Ladybird</i> by Eric Carle Pub. by Picture Puffin 0-14-050398-6	A ladybird's experiences as he learns to share.	Sharing Keeping your temper
<i>Titch</i> by Pat Hutchings Published by Puffin 0-14-050096-0	Titch learns that everyone is equally important.	Fairness and justice
<i>Angry Arthur</i> , by H Oram Published by Red Fox 0-992-9001-4	Arthur has to learn what is acceptable behaviour.	Right and wrong
<i>Little red hen</i> , by G. Rose Published by C.U.P. 0-521-47606-2	The hen's request for help is ignored and what happens next.	Fairness
<i>This is the Bear</i> by S. Hayes & H. Craig Published by Walker Books 0-7445-3621-9	How the bear suffers because of the bad behaviour of the dog.	Consequences of your actions
<i>Guess how much I love you</i> by Sam McBratney Published by Walker 0-7445-3224-8	Expressing feelings positively	Families
<i>When the Teddy Bears came to stay</i> by Martin Waddell Published by Walker Books 0-7445-4763-6	Have the new baby and all the teddies given as presents taken over mum and dad?	Families Relationships



Religious Education in the Early Years Foundation Stage

Appendix: Examples from the Non-Statutory National Framework for religious education that link to this guidance adapted to match the latest EYFS advice:

Prime areas of learning in the EYFS: Personal, social and emotional development

Examples of religious education–related experiences and opportunities

- Children use some stories from religious traditions as a stimulus to reflect on their feelings and experiences and explore them in various ways.
- Using a story as a stimulus, children reflect on the words and actions of characters and decide what they would have done in a similar situation. They learn about the story and its meanings through activity and play.
- Using role-play as a stimulus, children talk about some of the ways that people show love and concern for others and why this is important. Children think about issues of right and wrong and how humans help one another.

Example of an activity

In the context of a learning theme to do with 'growing' or 'the natural world', children encounter the parable of the mustard seed. They look at and talk about some tiny seeds and the teacher tells the parable, putting it into context as a story Jesus told. The teacher emphasises how, in the story, the tree that grew from the little seed became a safe home for birds. Children talk about what helps them to feel safe. They take a walk to look at trees and touch trees and think about how they should look after them. They plant, grow and take care of vegetables, plants and flowers they have grown from a seed.

They talk about what it would be like to fly up into the branches. They explore ways of moving and respond to music, growing like a seed. They produce shared or independent writing on what they would like to grow into. They discuss what happens as they grow and observe changes in their body over time. Through these experiences children become more aware of themselves, for example of the concepts 'I am growing', 'I need to feel safe'. They respond to the significant experiences of exploring a story and wonder at the growth of seeds. They learn to understand their responsibility to the natural world and begin to consider beliefs about Jesus.



Religious Education in the Early Years Foundation Stage

Prime Area (EYFS): communication and language and Specific Area: literacy

Examples of religious education–related experiences and opportunities

- Children have opportunities to respond creatively, imaginatively and meaningfully to memorable experiences.
- Using a religious celebration as a stimulus, children talk about the special events associated with the celebration.
- Through artefacts, stories and music, children learn about important religious celebrations.

Example of an activity

In the context of a learning theme to do with ‘books’ or ‘favourite stories’, children look at a child’s Haggadah and are encouraged to ask questions about it. They are told that the book belongs to a Jewish child who is celebrating Passover. The story of Passover is briefly told. Children are invited to think about their favourite books. The teacher talks about the child learning Hebrew and having an important job to do at the celebration meal. Children think about where and how they learn and how it feels to do something really well. They learn the words ‘Jewish’ and ‘Hebrew’. They use language in role-playing a family meal. They look at and talk about a variety of dual-language books, share other old stories from both oral and written traditions and make a class book based on a favourite story or a celebration they have shared. A questions board is set up for children to record any questions that come into their heads. Through these experiences, they learn about the importance of story and sacred texts in religion, develop respect for the beliefs and values of others and extend their vocabulary.

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Religious Education in the Early Years Foundation Stage

Specific Area (EYFS); Understanding of the world

Examples of religious education–related experiences and opportunities

- Children ask and answer questions about religion and culture, as they occur naturally within their everyday experiences.
- Children visit places of worship.
- They listen to and respond to a wide range of religious and ethnic groups.
- They handle artefacts with curiosity and respect.
- Having visited a local place of worship, children learn new words associated with the place, showing respect.

Example of an activity

In the context of a learning theme to do with ‘buildings’ or ‘special places’, children are shown a selection of pictures. They then learn about three different places where children go with their families to worship God: a church, the Golden Temple and a mosque.

Children are invited to talk about the pictures of places of worship, looking for common and distinctive features. They talk about somewhere they have been that they will remember. They go out and photograph significant places (and people) in the local area and display their pictures in school. They visit a place of worship and record what they see. They talk about building materials and how they are used. They look at patterns *and create buildings with construction resources*. They sort collections of and talk about photographs of buildings and they compare buildings in their local environment and far away, talking particularly about the local church, the Golden Temple and the mosque.

Through these experiences, children learn about the importance of places of worship, relating this to their own special places. They begin to be aware of their own cultures and beliefs and those of other people.



Religious Education in the Early Years Foundation Stage

Specific Area (EYFS); Expressive arts and design

Examples of religious education–related experiences and opportunities

- Using religious artefacts as a stimulus, children think about and express meanings associated with the artefact.
- Children share their own experiences and feelings and those of others, and are supported in reflecting on them.

Example of an activity

In the context of a learning theme to do with ‘water’, ‘journeys’ or ‘the natural world’, children look at a sealed pot that has water from the Ganges river inside it.

Once they know that the pot contains water, they are encouraged to imagine a wide, flowing river. They look at photographs or videos of rivers and waterfalls and talk about how water moves. They hear the story of the birth of the river Ganges (regarded by Hindus as sacred). The teacher emphasises that it is a story that helps some people imagine what God might be like. They look at photographs of Hindus bathing in the Ganges and talk about why the river is important to them. They are invited to think about their ideas about Heaven. In response to the story, they explore water through play, create rivers on the ground by pouring water and following the direction of the flow. They create a great river collage, using a variety of media. They explore different long flowing marks they can make with watery paint. They make a river dance, using lengths of coloured fabric and accompany it with percussion music.

Through these experiences, children develop their imagination through a variety of creative and expressive arts. They begin to think about the importance of water as a symbol in religion and why some people regard particular places as sacred.

Key Stage 1 and 2 Faith Content

Key Stage 1 and 2 Programmes of Study



Buddhism



Christianity



Hinduism



Islam



Judaism



Sikhism



Key Stages 1 and 2 Introduction

Key Stages 1 and 2 Programmes of Study

Statutory and non-statutory content

Key Stage 1

Throughout Key Stage 1, pupils explore Christianity and two other principal religions. They learn different beliefs about God and the world around them. They encounter and respond to a range of stories, artefacts and other religious materials. They learn to recognise that beliefs are expressed in a variety of ways and begin to use specialist vocabulary. They begin to understand the importance and value of religion and belief, especially for other children and their families. Pupils ask relevant questions and develop a sense of wonder about the world, using their imagination. They talk about what is important to them and others, valuing themselves, reflecting on their own feelings and experiences and developing a sense of belonging.

Knowledge, skills and understanding for Key Stage 1

Attainment Target 1: Learning about religion

Pupils should be taught to:

- a. explore a range of religious stories and sacred writings and talk about their meanings;
- b. name and explore a range of celebrations, worship and rituals in religion, noting similarities where appropriate;
- c. identify the importance, for some people, of belonging to a religion and recognise the difference this makes to their lives;
- d. explore how religious beliefs and ideas can be expressed through the arts and communicate their responses; and
- e. identify and suggest meanings for religious symbols and begin to use a range of religious words.

Key Stages 1 and 2 Introduction

Attainment Target 2: Learning from religion

Pupils should be taught to:

- a. reflect on and consider religious and spiritual feelings, experiences and concepts such as worship, wonder, praise, thanks, concern, joy and sadness;
- b. ask and respond imaginatively to puzzling questions, communicating their ideas;
- c. identify what matters to them and others, including those with religious commitments, and communicate their responses;
- d. reflect on how spiritual and moral values relate to their own behaviour; and
- e. recognise that religious teachings and ideas make a difference to individuals, families and the local community.

Breadth of study

During the two years of Key Stage 1, pupils in Lewisham schools should be taught the knowledge, skills and understanding through the following areas of study:

Religions and beliefs and compulsory units

- a. Christianity for Key Stage 1 – 4 half termly units
- b. **Two** other principal religions from the content provided for Buddhism, Hinduism, Islam, Judaism and Sikhism, one of which should be a religious community with a significant local presence in and around the school – the first two units of each = 4 half termly units
- c. A secular world view, where pupils introduce this from their own experience as appropriate; and
- d. The Natural World statutory unit

Plus three of the four following Key Stage 1 Optional Units:

- a. Belonging / Who am I?
- b. Right and Wrong
- c. Sharing Food
- d. Weddings

Key Stages 1 and 2 Introduction

Themes

1. Believing: what people believe about God, humanity and the natural world;
2. Story: how and why some stories are sacred and important in religion;
3. Celebrations: how and why celebrations are important in religion;
4. Symbols: how and why symbols express religious meaning;
5. Leaders and teachers: figures who have an influence on others locally, nationally and globally in religion;
6. Belonging: where and how people belong and why belonging is important; myself: who I am and my uniqueness as a person in a family and community;

Experiences and opportunities

1. Visiting places of worship and focusing on symbols and feelings.
2. Listening and responding to visitors from local faith communities.
3. Using their senses and having times of quiet reflection.
4. Using music, dance, drama, art and design to develop their creative talents and imagination.
5. Sharing their own beliefs, ideas and values and talking about their feelings and experiences.
6. Beginning to use ICT to explore religions and beliefs as practised in the local and wider community.

Key Stages 1 and 2 Introduction

Key Stage 2

Throughout Key Stage 2, pupils learn about Christianity and all five of the other principal religions, recognising the impact of religion and belief locally, nationally and globally. They make connections between differing aspects of religion and consider the different forms of religious expression.

They consider the beliefs, teachings, practices and ways of life central to religion. They learn about sacred texts and other sources and consider their meanings. They begin to recognise diversity in religion, learning about similarities and differences both within and between religions and beliefs and the importance of dialogue between them.

They extend the range and use of specialist vocabulary. They recognise the challenges involved in distinguishing between ideas of right and wrong, and valuing what is good and true. They communicate their ideas, recognising other people's viewpoints. They consider their own beliefs and values and those of others in the light of their learning in religious education.

Key Stages 1 and 2 Introduction

Knowledge, skills and understanding for Key Stage 2

Attainment Target 1: Learning about religion

Pupils should be taught to:

- a. describe the key aspects of religions, especially the people, stories and traditions that influence the beliefs and values of others;
- b. describe the variety of practices and ways of life in religions and understand how they stem from, and are closely connected with, beliefs and teachings;
- c. identify and begin to describe the similarities and differences within and between religions;
- d. investigate the significance of religion in the local, national and global communities;
- e. consider the meaning of a range of forms of religious expression, understand why they are important in religion and note links between them;
- f. describe and begin to understand religious and other responses to ultimate and ethical questions;
- g. use specialist vocabulary in communicating their knowledge and understanding; and
- h. use and interpret information about religions from a range of sources.

Attainment Target 2: Learning from religion

Pupils should be taught to:

- a. reflect on what it means to belong to a faith community, communicating their own and others' responses;
- b. respond to the challenges of commitment both in their own lives and within religious traditions, recognising how commitment to a religion is shown in a variety of ways;
- c. discuss their own and others' views of religious truth and belief, expressing their own ideas;
- d. reflect on ideas of right and wrong and their own and others' responses to them;
- e. reflect on sources of inspiration in their own and others' lives.

Key Stages 1 and 2 Introduction

Breadth of study

During this key stage, pupils in Lewisham schools should be taught the knowledge, skills and understanding through the following areas of study:

- a. Christianity for Key Stage 2 – 5 half term units
- b. five other principal religions – Buddhism, Hinduism, Islam, Judaism and Sikhism, - **the remaining** two units from those faiths introduced in KS1 and **all** four units from the other 3 faiths that have not yet been studied totalling 16 half termly units
- c. a secular world view, where appropriate

Plus the following statutory units:

- a. The Journey of life and death
- b. Peace
- c. Understanding faith and belief in Lewisham

The units for every faith in Key Stages 1 and 2 have been written to be taught in the order that they are numbered so that learning is scaffolded to develop knowledge, understanding and concepts.

Key Stages 1 and 2 Introduction

Themes

1. Beliefs and questions: how people's beliefs about God, the world and others impact on their lives;
2. Teachings and authority: what sacred texts and other sources say about God, the world and human life;
3. Worship, pilgrimage and sacred places: where, how and why people worship, including at particular sites;
4. The journey of life and death: why some occasions are sacred to believers, and what people think about life after death;
5. Symbols and religious expression: how religious and spiritual ideas are expressed;
6. Inspirational people: figures from whom believers find inspiration;
7. Religion and the individual: what is expected of a person in following a religion or belief;
8. Religion, family and community: how religious families and communities practice their faith, and the contributions this makes to local life; and
9. Beliefs in action in the world: how religions and beliefs respond to global issues of human rights, fairness, social justice and the importance of the environment.

Experiences and opportunities

1. Encountering religion through visitors and visits to places of worship, and focusing on the impact and reality of religion on the local and global community;
2. Discussing religious and philosophical questions, giving reasons for their own beliefs and those of others;
3. Considering a range of human experiences and feelings;
4. Reflecting on their own and others' insights into life and its origin, purpose and meaning;
5. Expressing and communicating their own and others' insights through art and design, music, dance, drama and ICT; and
6. Developing the use of ICT, particularly in enhancing pupils' awareness of religions and beliefs globally.



Buddhism

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<p>Unit 1 – The Buddha</p> <p>The Buddha</p> <ul style="list-style-type: none"> • The Buddha’s life and search for truth. • The Buddha means the ‘awakened one’. • He was a human being who ‘woke up’ from the ‘sleep of confusion’. This is like awakening from a dream and becoming perfectly aware of the truth. The Buddha became free of suffering and was able to help others to ‘awaken themselves’. <p>Teachings of the Buddha</p> <p>The Four Noble Truths. People should work at becoming kind, compassionate, generous, truthful and patient. People should try not to hurt any living thing, take things that are not given and try to be honest and straightforward.</p> <ul style="list-style-type: none"> • Story of Siddhartha and the Swan. <p>Key Questions:</p> <ul style="list-style-type: none"> • What is a Buddha? • How did the Buddha teach that people should live? <p>Concepts:</p> <p>AT1: Beliefs, teachings and sources. Practices and ways of life.</p> <p>AT2: Meaning, purpose and truth. Values and commitments.</p>	<p>Unit 2 – Living as a Buddhist</p> <p>The Buddhist Community – Sangha</p> <p>Lives out the teachings of the Buddha.</p> <ul style="list-style-type: none"> • All members support one another. • Story of The King’s Elephant – keeping good company matters. • Buddhists meditate to help them understand the teachings of the Buddha by developing awareness and mindfulness. <p>The home shrine, a Temple or Buddhist Centre</p> <ul style="list-style-type: none"> • Place where teachings are given. • Where Buddhists meditate together. • A sacred space, where removal of shoes shows respect. • A shrine – with an image of the Buddha. Images of the Buddha communicate values of wisdom and compassion. <p>Key Questions:</p> <ul style="list-style-type: none"> • What is the importance of a temple or a Buddhist centre? • Why do Buddhists have images of the Buddha? <p>Concepts:</p> <p>AT1: Beliefs, teachings and sources. Practices and ways of life.</p> <p>AT2: Identity and belonging. Meaning, purpose and truth.</p>	<p>Unit 3 – Following the Buddha’s Teaching</p> <p>The Buddha</p> <ul style="list-style-type: none"> • The Buddha is the perfect example of what people can become. • The Noble Eightfold Path. • Symbols, e.g. the wheel and lotus. The Dharma (Buddhist teachings). • Story that illustrates Buddhist values – The Monkey King. • All Buddhists try to learn and practice the Dharma. This is the teaching and practice that leads to awakening. <p>Key Questions:</p> <ul style="list-style-type: none"> • How do Buddhists try to follow the teachings of the Buddha? • How do the teachings and example of the Buddha help Buddhists to grow towards enlightenment? <p>Concepts:</p> <p>AT1: Beliefs, teachings and practices. Forms of expression.</p> <p>AT2: Meaning, purpose and truth.</p>	<p>Unit 4 – The Buddhist Community Worldwide</p> <ul style="list-style-type: none"> • The Sangha. • People who follow the Dharma. • Some live as monks and nuns. • Others meditate and practice Buddhism in ordinary lives. • The five precepts. <p>Building and Places in the Wider World:</p> <ul style="list-style-type: none"> • Places of pilgrimage and their significance, e.g. Lumbini – birth place of Buddha. Bodhgaya – place of enlightenment. Deer park at Sarnath – first teachings of Buddha. Kushinagar – where he passed away. <p>Vaisakha Puja or Vesak/Wesak</p> <p>Festival remembering the life, enlightenment and teaching of the Buddha.</p> <p>Key Questions:</p> <ul style="list-style-type: none"> • Which places have special meaning to Buddhists? • How do Buddhists try to live a good life? <p>Concepts:</p> <p>AT1: Beliefs, teachings and sources. Practices and ways of life.</p> <p>AT2: Identity and belonging. Meaning, purpose and truth.</p>
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Buddhism in the Thematic Units

The Journey of Life and Death

The ways in which human experiences associated with death, loss, hope, and meaning in life are understood in Buddhism.

All things change

Beliefs about death and rebirth.

Key Questions:

- What do Buddhists believe happens after death?
- What do Buddhists believe the purpose of life to be?
- How do Buddhists support people during times of loss?

Concepts:

AT1: Beliefs, teachings, practices.
AT2: Meaning, purpose and truth.

Right and Wrong

The Buddha taught people how to behave through stories.

The story of the Lion and the Jackal.

Actions have consequences; good actions have good consequences.

Key Questions:

- What is the meaning of the story for Buddhists and for everyone?
- How do stories help us to explore our own beliefs and values?

Concepts:

AT1: Beliefs, teachings, practices.
AT2: Meaning, purpose and truth.



The London Buddhist Centre



Key Stage 1 Christianity

YEAR 1

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<p>The Natural World Unit</p> <p>Beliefs:</p> <ul style="list-style-type: none"> • God as creator. <p>Teachings:</p> <ul style="list-style-type: none"> • People are responsible for living things on the planet. <p>Christians try to follow the example of Jesus:</p> <ul style="list-style-type: none"> • St Francis. • Sharing with others, e.g. charities, • the Harvest Festival, sharing food with others. • Christians believe that everyone is important and of equal value. <p>Key Questions:</p> <ul style="list-style-type: none"> • How do Christians believe the world began? • What do Christians believe about God? • How do Christians believe they should treat each other and God's world? <p>Concepts: AT1: Beliefs, teachings. Concept of God. AT2: Values and commitments</p>	<p>Unit 1 The Bible and Christmas</p> <p>Beliefs:</p> <ul style="list-style-type: none"> • Christians believe that Jesus is God's Son • The Bible is a special book: <ul style="list-style-type: none"> – different from other books. – Stories about the birth and life of Jesus. • Christian celebrations: <ul style="list-style-type: none"> – Christmas: the celebration of Jesus' birth which shows He is special for Christians. <p>Key Questions:</p> <ul style="list-style-type: none"> • What do Christians remember at Christmas? • What do Christians believe about Jesus? • Why is the Bible important to Christians? <p>Concepts: AT1: Beliefs, teachings and sources. Concept of God. Forms of expression. AT2: Meaning, purpose and truth.</p>	<p>Unit 2 A Local Church</p> <p>Church buildings:</p> <ul style="list-style-type: none"> • Places where Christians worship together, read the Bible, listen to stories, sing and pray once or more times weekly. • Leaders e.g. priests, ministers, elders. • Objects and symbols in churches. • Important ceremonies e.g. welcoming/dedication/infant baptisms. <p>Most Christians keep Sunday as a special holy day.</p> <p>Christians try to follow the example of Jesus:</p> <ul style="list-style-type: none"> • Caring for others, e.g. children, the elderly. • The work of Christians in the wider community <p>Key Questions:</p> <ul style="list-style-type: none"> • What happens in a Christian place of worship? • How does a place of worship help Christians to remember their beliefs about Jesus? • How do Christians try to follow Jesus' example? <p>Concepts: AT1: Beliefs, teachings and sources. Practices and ways of life. Forms of expression. AT2: Identity and belonging. Values and commitments.</p>	<p>Easter (Extra focus)</p> <p>Why do we have hot cross buns and Easter eggs?</p> <p>Simple version of Easter story to link with these Easter foods.</p> <p>Key Questions:</p> <ul style="list-style-type: none"> • What do Christians believe happened at Easter? <p>Concepts: AT1: Beliefs, teachings and sources. Practices and ways of life. Forms of expression. AT2: Meaning.</p>
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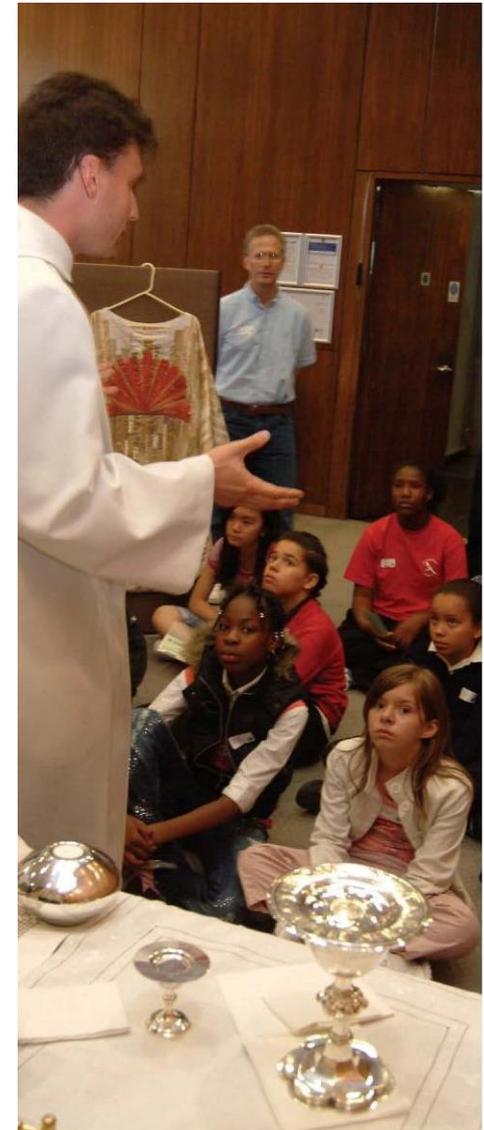


Key Stage 1 Christianity

YEAR 2

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<p>Unit 3 The Life and Teachings of Jesus</p> <p>Stories about Jesus which develop Christian values:</p> <ul style="list-style-type: none"> • Zacchaeus. <p>Stories Jesus told which develop Christian values and contain His teaching on forgiveness and love:</p> <ul style="list-style-type: none"> • The Lost Son • The Good Samaritan <p>The two greatest Commandments 'Love God' and 'Love your neighbour'.</p> <p>The Bible is a special book:</p> <ul style="list-style-type: none"> • Christians read it to learn about Jesus. <p>Key Questions:</p> <ul style="list-style-type: none"> • What values do Christians believe Jesus taught? • How do Christians believe Jesus taught them these values? • Why is the Bible a special book for Christians? <p>Concepts: AT1: Beliefs, teachings and sources. Practices and ways of life. AT2: Values and commitments</p>	<p>Unit 4 Easter and Symbols</p> <p>The story of Jesus' death and resurrection emphasises the idea that Jesus is special for Christians.</p> <p>Symbols</p> <ul style="list-style-type: none"> • Recall symbolism from Year 1 focus • Symbols of Easter e.g. palm crosses, Easter gardens, colours of vestments and in churches, candles • Symbolic actions: washing feet on Maundy Thursday • Christians sharing food together to remember Jesus' last meal with His friends <p>Key Questions:</p> <ul style="list-style-type: none"> • What do symbols of Easter represent? • What symbolic actions take place around Easter? • How do symbols and symbolic actions show the importance of Easter for Christians? <p>Concepts: AT1: Beliefs, teachings. Practices and ways of life. Forms of expression and Symbolism. AT2: Belonging. Death and new life.</p>	<p>Christmas (Extra Focus)</p> <p>Symbols of Christmas:</p> <ul style="list-style-type: none"> • Star • Advent Candles • Colours of vestments and in churches <p>Key Questions:</p> <ul style="list-style-type: none"> • What do symbols of Christmas mean? • How do symbols show the importance of Christmas for Christians? <p>Concepts: AT1: Beliefs, teachings. Practices and ways of life. Forms of expression and symbolism. AT2: Belonging.</p>
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Key Stage 2 Christianity

YEAR 3

<p>Unit 5 – The Bible</p> <ul style="list-style-type: none"> • A source of Christian belief and teaching - some Christians read the Bible every day and find it helpful for their everyday lives. • The Old and New Testaments include many books with different genres; these include history, law and songs: Joseph, Psalm 23, Isaiah’s Prophecy. <p>The gospel stories tell about events in Jesus’ life.</p> <p>Jesus’ teaching about the Kingdom of God in parables: The Lost Sheep.</p> <p>Ten Commandments with particular focus on the two greatest commandments.</p> <p>Key Questions:</p> <ul style="list-style-type: none"> • How do Christians use the Bible? • What does the Bible contain? • How does using the Bible help Christians to grow in their faith? <p>Concepts: AT1: Beliefs, teachings and sources. Ways of life. Forms of expression. AT2: Meaning, purpose and truth. Values and commitments.</p>	<p>Peace Unit</p> <p>Christian ways of life:</p> <ul style="list-style-type: none"> • Christians respond to personal and social issues, locally and globally, in a number of ways and can draw inspiration from other Christians, e.g. Martin Luther King. <p>The Bible:</p> <ul style="list-style-type: none"> • Sermon on the Mount. <p>The Church:</p> <ul style="list-style-type: none"> • Worship includes the use of stillness and silence for reflection. <p>Key Questions:</p> <ul style="list-style-type: none"> • What do Christians believe about Peace? • How do Christians try to demonstrate Peace? • From where do Christians get their attitudes towards Peace? • How are Christian values about Peace similar to those of other faiths? <p>Concepts: AT1: Beliefs, teachings and sources. Practices and ways of life. Forms of expression. AT2: Meaning and truth. Values and commitments.</p>	<p>Christmas (Extra Focus)</p> <p>How Christmas is celebrated by Christians in other countries focussing on the central shared celebration of the birth of Jesus.</p> <p>Key Questions:</p> <ul style="list-style-type: none"> • Why is Christmas celebrated in different ways around the world? • What do all Christians share about Christmas? <p>Concepts: AT1: Beliefs, teachings. Practices and ways of life. Forms of expression. AT2: Identity and Belonging. Meaning and truth.</p>	<p>Easter (Extra Focus)</p> <p>Easter story – through the eyes of different characters, e.g.:</p> <ul style="list-style-type: none"> • Peter • Other disciples • Member of the crowd • Mary • Romans <p>Key Question:</p> <ul style="list-style-type: none"> • What were the experiences and feelings of different witnesses of what happened at the first Easter? <p>Concepts: AT1: Beliefs, teachings and sources. Practices and ways of life. Forms of expression. AT2: Identity and Belonging. Meaning and truth.</p>
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Key Stage 2 Christianity

YEAR 4

Unit 6 – Local Christian Places of Worship

- Special places for Christians.
- There are many different types of Christian places of worship.
- Belonging to a group and sharing activities with others is important and meaningful.
- Worship includes the use of stillness and silence for reflection.
- Reasons why people pray.

The Lord's Prayer

The Bible (a source of Christian belief and teaching) used in services

Key Questions:

- Why are there different places of worship for Christians?
- What similarities are there in what Christians believe?
- How does coming together help Christians to grow in their faith?

Concepts:

AT1: Beliefs, teachings and sources. Ways of life.

Forms of expression.

AT2: Identity and Belonging.

Meaning, purpose and truth.

Values and commitments.

Unit 7 – Christian Celebrations

The Church has its own calendar with special names for certain times of the year:

- Times associated with Jesus' life; how Christians understand and celebrate these events – Christmas and Easter
- Times of reflection: Advent and Lent - Jesus' temptation.
- Sharing the Lord's Supper.
- Pentecost

Key Questions:

- How do festivals help Christians to remember Jesus and His teachings?
- What happens in places of worship to help Christians understand the meaning behind their festivals?

Concepts:

AT1: Beliefs, teachings and sources. Ways of life.

Forms of expression.

AT2: Identity and Belonging.

Meaning, purpose and truth.

Values and commitments.



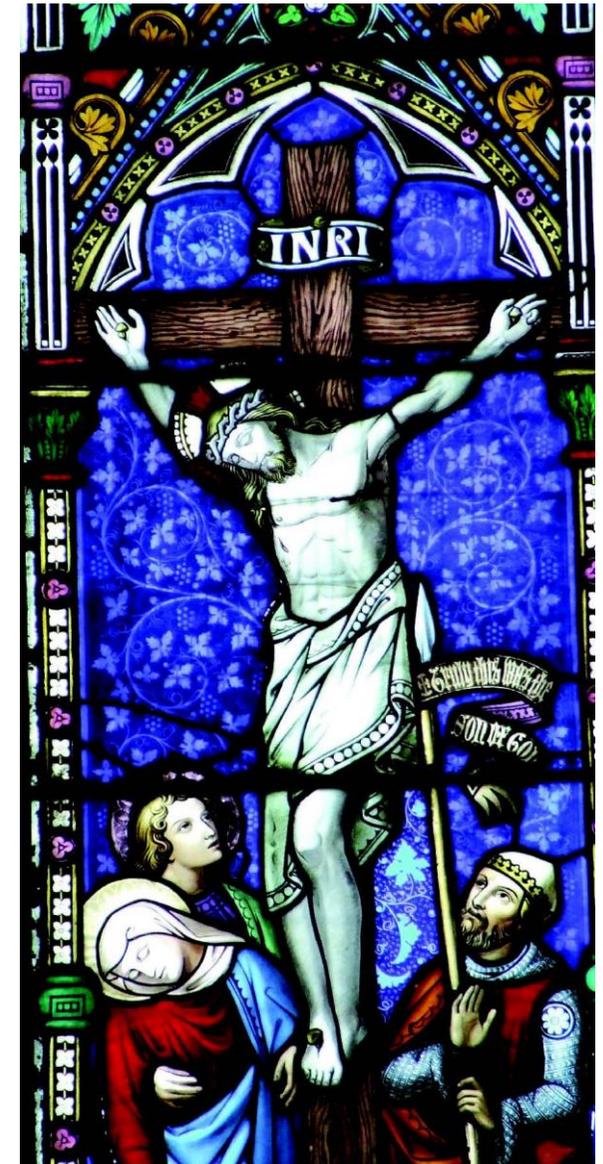


Key Stage 2 Christianity

YEAR 5

<p>Unit 8 Jesus Human and Divine</p> <p>God:</p> <ul style="list-style-type: none"> • Father, Son and Holy Spirit • Christmas – Jesus’ birth. • Choosing 12 disciples AND friends • Jesus’ temptations • Jesus’ baptism • Miracles and acts of healing e.g. ‘Stilling the storm’, ‘The four friends’ or ‘Healing a leper’ • Easter - Jesus’ death, resurrection and afterwards. <p>Key Questions:</p> <ul style="list-style-type: none"> • Who do Christians believe Jesus to be? • What evidence do Christians base their beliefs upon? <p>Concepts: AT1: Beliefs, teachings and sources. Ways of life. Forms of expression. AT2: Identity and Belonging. Meaning, purpose and truth.</p>	<p>Unit 9 Leading a Christian Life</p> <p>Commitment, belonging and belief in the special presence of God during significant life events.</p> <p>Example of at least one person and one charitable organisation that exemplifies Christianity in action.</p> <p>Encounter with one local Christian to share how their life is led by faith</p> <p>Key Questions:</p> <ul style="list-style-type: none"> • How do Christians follow Jesus and His teachings in their daily lives? • What Christian values guide the actions of the people and organisations studied? • What are the challenges of living a Christian life today? <p>Concepts: AT1: Beliefs, teachings and sources. Ways of life. Forms of expression. AT2: Identity and Belonging. Meaning, purpose and truth. Values and commitments.</p>	<p>Christmas (Extra Focus)</p> <p>Commercialisation of Christmas</p> <p>Key Questions:</p> <ul style="list-style-type: none"> • How and why has Christmas become commercialised? • How do Christians try to keep the religious meaning of Christmas? <p>Concepts: AT1: Beliefs, teachings. Practices and ways of life. Forms of expression. AT2: Meaning and truth.</p>
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Key Stage 2 Christianity

YEAR 6

<p>The Journey of Life and Death</p> <p>Ways in which human experiences associated with death, loss and bereavement are understood in Christianity.</p> <p>Key Questions:</p> <ul style="list-style-type: none"> • What do Christians believe happens after death? • What do Christians believe the purpose of life to be? • How do Christians support people during times of loss? <p>Concepts: AT1: Beliefs, teachings, practices. AT2: Belonging. Meaning, purpose and truth.</p>	<p>Understanding Faith and Belief in Lewisham</p> <p>Christian communities in Lewisham</p> <p>Key Questions:</p> <ul style="list-style-type: none"> • what can we discover about this faith in our class and school? • what can we discover about this faith in the local community and Lewisham borough? • how have Christian faith communities in Lewisham changed over the past 50 years? • what are the reasons for changes in these communities? • how do faith groups work in partnership with each other and the local community? • how has life in Lewisham been enriched by the diversity of the faiths and beliefs that make up the borough? <p>Concepts: AT1: Beliefs, teachings. Practices and ways of life. Forms of expression. AT2: Identity and belonging. Meaning and truth.</p>	<p>Christmas (Extra Focus)</p> <p>Christmas and the Nativity through art and other media.</p> <p>Key Questions:</p> <ul style="list-style-type: none"> • How have Christians, over time and in different parts of the world, used art to express their beliefs and feelings about Christmas? • How can representations of the nativity help or hinder understanding of Jesus' real background as a Jew? <p>Concepts: AT1: Beliefs, teachings. Forms of expression. AT2: Identity and belonging. Meaning and truth.</p>	<p>Easter (Extra Focus)</p> <p>Actions and symbolism of Easter celebrations in the Orthodox Tradition.</p> <p>Key Questions:</p> <ul style="list-style-type: none"> • How does the Orthodox Easter symbolise Christian beliefs about Jesus? • What do all Christians share about Easter? • What does Easter teach all Christians about their journey of life and death? <p>Concepts: AT1: Beliefs, teachings. Practices and ways of life. Forms of expression. AT2: Identity and belonging. Meaning and truth.</p>
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Key Stage 1 Christianity in the Thematic Units

Optional Unit

<p>Belonging / Who Am I?</p> <p>What it means to belong and worship within Christianity.</p> <p>How people show that they belong and what is special for them about belonging to their Christian faith.</p> <p>Key Questions:</p> <ul style="list-style-type: none"> • What does it mean to belong? • What are the outward signs that a person belongs to a religious family? • What happens to a child when they join a religious family? • What have we learnt about the importance of belonging to a religious family? <p>Concepts: AT1: Beliefs, teachings. Practices and ways of life. AT2: Identity and belonging. Meaning and truth.</p>	<p>Right and Wrong</p> <p>The rules Christians believe they should live by:</p> <ul style="list-style-type: none"> • The Ten Commandments taught people how to behave towards God and each other; • Christians believe that to help people Jesus summarised these into 2 great commandments using another Jewish text. <p>Key Questions:</p> <ul style="list-style-type: none"> • Why did Jesus summarise the Ten Commandments for His followers? • How do Christians try to live according to their beliefs and values? <p>Concepts: AT1: Beliefs, teachings, practices. AT2: Meaning and truth.</p>	<p>Sharing Food</p> <p>How Christians follow the example of Jesus who shared food with His disciples at the Last Supper. Christians also often pray before a meal to thank God for their food.</p> <p>Key Questions:</p> <ul style="list-style-type: none"> • Why is it important for Christians to share bread and wine? • What happened at the Last Supper? <p>Concepts: AT1: Beliefs, teachings. Practices and ways of life. AT2: Identity and belonging</p>	<p>Weddings</p> <p>Christians celebrate a wedding with their family, friends and the wider Christian community</p> <p>What happens during a traditional Christian wedding</p> <p>Symbols of a Christian wedding and their meaning</p> <p>Understand that a wedding is celebrating the story of a relationship and asking God to bless it.</p> <p>Key Questions:</p> <ul style="list-style-type: none"> • What is a wedding? • What happens in a Christian wedding that show the people getting married believe God is there? <p>Concepts: AT1: Beliefs, teachings. Practices and ways of life. AT2: Identity and belonging.</p>
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Hinduism

<p>Unit 1 God</p> <p><u>Hindu Gods are worshipped as Male or Female</u></p> <ul style="list-style-type: none"> • Shiva & Shakti; • Vishnu & Lakshmi; • Brahma & Sarasvati; and • Ganesh, Murugan, Hanuman <p>God has visited Earth at different times in different forms to help people: – Rama – Krishna.</p> <p><u>Important Festivals</u></p> <ul style="list-style-type: none"> • Diwali • Pongal – (Harvest Festival) • New Year – (In April) <p><u>Stories</u></p> <ul style="list-style-type: none"> • Murugan and Ganesh • Diwali (Rama-Sita and the 10 Headed Demon Ravana) <p>Key Questions:</p> <ul style="list-style-type: none"> • How does the story of Diwali teach about good and evil? <p>Concepts: AT1: Beliefs, teaching, sources. Practices and ways of life. AT2: Identity and belonging. Meaning, purpose and truth.</p>	<p>Unit 2 –Hindu Belief and Home</p> <p><u>The Hindu Home</u></p> <ul style="list-style-type: none"> • Family • Respect for all people and living things. • Home as a place of worship. <p><u>Worship in the Temple (Mandir / Kovil)</u></p> <ul style="list-style-type: none"> • Puja, The Arti and Abhisheka ceremonies • The Mandir/Kovil and the home is the Hindu place of worship. <p>Key Questions:</p> <ul style="list-style-type: none"> • What is the importance of family in Hinduism? • What is the role of a Hindu temple in a Hindu’s life? • How important is ‘home’ as a place of worship to Hindus? <p>Concepts: AT1: Practices and ways of life. AT2: Identity and belonging.</p>	<p>Unit 3 – God and Beliefs</p> <p><u>Sacred Books</u></p> <ul style="list-style-type: none"> • Ramayana, Mahabharata, • Bhagwat Gita, Veda <p><u>Religious Word</u> Aum/Om</p> <p><u>Belief and values</u></p> <ul style="list-style-type: none"> • The importance of honesty and truthfulness. • Karma: Take responsibility for your actions. • Hospitality is important to Hindus. <p>Key Questions:</p> <ul style="list-style-type: none"> • What does it mean to be a Hindu? • How important is peace in Hinduism? <p>Concepts: AT1: Beliefs, teaching, sources. Practices and ways of life. AT2: Identity and belonging. Meaning, purpose and truth.</p>	<p>Unit 4 – Pilgrimage</p> <p><u>The Wider World</u></p> <ul style="list-style-type: none"> • Hinduism originated in India. • Hindus live across the world. • Places of pilgrimage and their significance: <ul style="list-style-type: none"> – The Ganges – Kailash – Rameswaram • Stories associated with places of pilgrimage. <p>Key Questions:</p> <ul style="list-style-type: none"> • How important is The Holy Ganges and what role does it play in Hindu belief? <p>Concepts: AT1: Beliefs, teaching, sources. Practices and ways of life. AT2: Identity and belonging. Meaning, purpose and truth.</p>
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Hinduism in the Thematic Units

<p>Sharing Food</p> <ul style="list-style-type: none"> • Hindus offer food to God and then consume it as God's blessing. • Hindus refrain from consuming beef. <p>Key Questions:</p> <ul style="list-style-type: none"> • Why is offering food to God important for Hindus? 	<p>Weddings</p> <ul style="list-style-type: none"> • Understand the inner meaning of a Hindu wedding. • Explore ways of celebrating a Hindu wedding. • Understand the story of the Hindu wedding and the community that celebrate it. • Discussion about the role of the community before and during the wedding. • Understand that family is at the centre of marriage and wedding. <p>Key Questions:</p> <ul style="list-style-type: none"> • How are Hindu weddings celebrated? • What is the importance of family during a wedding? 	<p>Belonging</p> <ul style="list-style-type: none"> • Know what is involved for a child in belonging to the Hindu religion • Know about naming in Hinduism <p><u>Special Times (Functions) for a child</u></p> <ul style="list-style-type: none"> • Seemamtham (Baby Shower) • Namakaran (Baby Naming) • Anna Prashana (First Solid food) • Chaula/Mottai (Hair shave on the head) • Upanayana (First Writing) <p>Key Question:</p> <ul style="list-style-type: none"> • What does it mean to belong in Hinduism? <p>Concepts:</p> <p>AT1: Beliefs, teaching, sources. Practices and ways of life.</p> <p>AT2: Identity and belonging</p>
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Hinduism in the Thematic Units

<p>Peace</p> <p>Non injury to living things- Ahimsa (Non-violence).</p> <p>Gandhi's life – demonstrating Ahimsa in practice through non-violent protest.</p> <p>Key Questions:</p> <ul style="list-style-type: none"> • What is the meaning of Ahimsa? • Why did Gandhi practice non-violence? <p>Concepts: AT1: Beliefs, teaching, sources. Practices and ways of life. AT2: Identity and belonging. Meaning, purpose and truth.</p>	<p>The Journey of Life and Death</p> <ul style="list-style-type: none"> • Ways in which human experiences associated with death, loss, hope and meaning of life are understood in Hinduism. • Know how the Hindu community respond to bereavement and helps support the person who is bereaved. • The concept of rebirth <p>Key Questions:</p> <ul style="list-style-type: none"> • How do Hindus deal with bereavement? • What do Hindus believe about death and the afterlife? • What are the rituals after one's death? <p>Concepts: AT1: Beliefs, teaching, sources. Practices and ways of life. AT2: Identity and belonging. Meaning, purpose and truth.</p>
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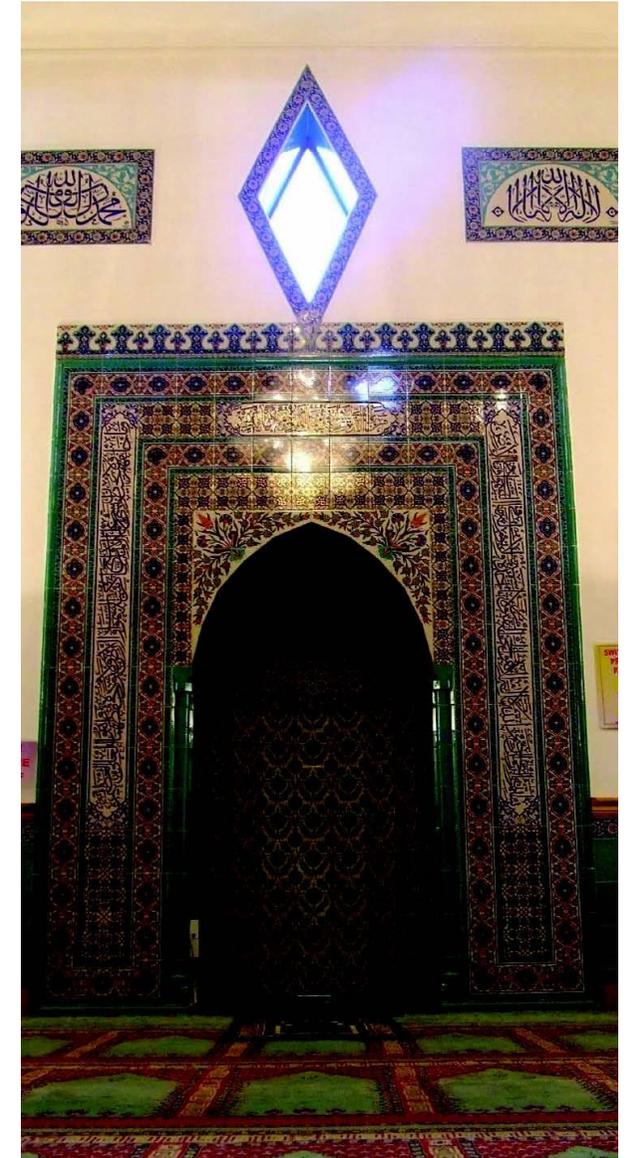
Islam

<p>Unit 1 – Prophet Muhammad (pbuh) messenger of Allah</p> <p>Who is Allah?</p> <p>Stories from the life of the Prophet Muhammad (pbuh)</p> <p>Living as a Muslim</p> <ul style="list-style-type: none"> Respect for self and others. Birth of a baby. <p>The Qur’an</p> <p>Revelation of the Qur’an.</p> <p>The Qu’ran is the holy book of Islam in Arabic.</p> <ul style="list-style-type: none"> The Qu’ran must be treated with respect. <p>Key Questions:</p> <ul style="list-style-type: none"> What do Muslims believe? Why is Prophet Muhammad (pbuh) important to Muslims? What is the Qur’an? <p>Concepts:</p> <p>AT1: Beliefs, teachings, sources. Practices and ways of life.</p> <p>AT2: Identity and belonging. Meaning, purpose and truth</p>	<p>Unit 2 – Five Pillars of Islam</p> <ol style="list-style-type: none"> Shahadah – Bearing witness in Allah as the One God and Prophet Muhammad (pbuh) as His messenger. Salah - Prayer. Sawm - Fasting. Zakat - Charity. Hajj - Pilgrimage. <p>Worship of Allah</p> <ul style="list-style-type: none"> Muslims serve Allah in many ways. Daily Salah. Giving charity. Brother/sister hood. <p>The Muslim Home</p> <ul style="list-style-type: none"> Worship in the home. <p>Place of Worship</p> <ul style="list-style-type: none"> The Mosque (Masjid). <p>Key Questions:</p> <ul style="list-style-type: none"> How do Muslims express their beliefs? What does worship mean to Muslims? <p>Concepts:</p> <p>AT1: Beliefs, teachings, sources. Practices and ways of life.</p> <p>AT2: Identity and belonging. Meaning, purpose and truth.</p>	<p>Unit 3 – Ramadan and Id ul Fitr</p> <p>Sawm</p> <ul style="list-style-type: none"> Ramadan – a time to focus on Allah, being a good Muslim and considering those who have less. Qur’anic quotes about fasting. Fasting and eating in Ramadan. Worship during Ramadan Id ul Fitr – celebration of keeping the fast at its end. Zakat al Fitr Charity at Id. <p>Key Questions:</p> <ul style="list-style-type: none"> Why do Muslims fast during Ramadan? How does fasting help Muslims to grow closer to Allah and to each other? How do Muslims celebrate Id? <p>Concepts:</p> <p>AT1: Beliefs, teachings, practices. Concept of God.</p> <p>AT2: Meaning, purpose and truth.</p>	<p>Unit 4 – Hajj and Id ul Adha</p> <p>Story of Prophet Ibrahim (pbuh) and his son Ismail (pbuh) rebuilding the Ka’aba.</p> <p>Umrah (lesser pilgrimages. Not fixed to time).</p> <p>Qur’anic quotes about Hajj</p> <p>Hajj requirements.</p> <p>Id ul Adha</p> <p>Festival that takes place the day after the gathering of pilgrims on Mount Arafah. A time for Muslims worldwide to celebrate.</p> <p>Key Questions:</p> <ul style="list-style-type: none"> What is a pilgrimage? Why do Muslims go on Hajj? Which stories are associated with the places on Hajj? How does the Hajj make Muslims appreciate they are all part of one family? <p>Concepts:</p> <p>AT1: Beliefs, teachings, practices. Concept of God.</p> <p>AT2: Meaning, purpose and truth.</p>
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Islam in the Thematic Units

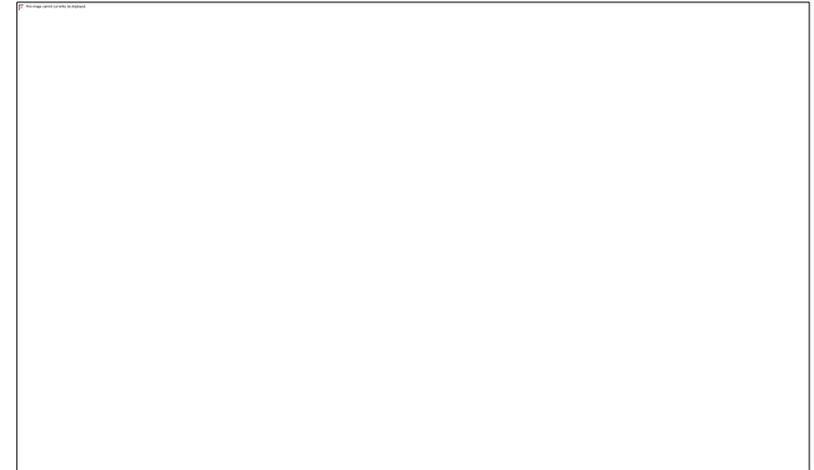
<p>The Natural World</p> <p>Muslims believe in one God Allah is the Arabic and Islamic name for God. He is the Creator, who provides all things. He has no partners.</p> <p>Key Questions: How do Muslims believe the world began? What do Muslims believe about Allah?</p> <p>Concepts: AT1: Beliefs, teachings. Concept of God. AT2: Values and commitments</p>	<p>Belonging</p> <p>Know what is involved for a child in belonging to the Muslim faith at home.</p> <p>Key Question:</p> <ul style="list-style-type: none"> • How does Muslim life show faith in Allah? <p>Concepts: AT1: Beliefs, teachings, practices. Concept of God. AT2: Meaning, purpose and truth.</p>	<p>Right and Wrong</p> <p>Muslims learn how to behave from the Qur'an and stories about Prophet Muhammad (pbuh).</p> <p>The story of Prophet Muhammad (pbuh) and the Old Woman.</p> <p>Key Questions:</p> <ul style="list-style-type: none"> • How does Islam teach how you should treat others? • What message did Muhammad (pbuh) give to the old woman about how Allah expected people to behave? <p>Concepts: AT1: Beliefs, teachings, practices. AT2: Meaning, purpose and truth.</p>
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Islam in the Thematic Units

<p>Peace</p> <p>'As-salaam' is one of the beautiful names of Allah meaning the 'Source of Peace'.</p> <p>Key Question: How does the Muslim greeting 'Assalaamu alaykum' (Peace be upon you) reflect Muslim beliefs about Allah?</p> <p>Concepts: AT1: Beliefs, teachings, practices. Concept of God. AT2: Meaning, purpose and truth</p>	<p>The Journey of Life and Death</p> <p>The ways in which human experiences associated with death, loss, hope, and meaning in life are understood in Islam.</p> <p>Key Questions:</p> <ul style="list-style-type: none">• What do Muslims believe happens after death?• How do Muslims support people during times of loss? <p>Concepts: AT1: Beliefs, teachings, practices. AT2: Meaning, purpose and truth</p>
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Judaism

<p>Unit 1 – Shabbat – A Day of Rest</p> <p>Shabbat – the Sabbath Day - Day of separation and different from other days; a day of rest and joy, remembering God creating and resting. What happens?</p> <ul style="list-style-type: none"> • Preparing for Shabbat. • Sunset candle lighting. • Blessings. • Shared meal – Kiddush • Shabbat Table and customs. • Charity contributions (Tzedakah).¹ <p>Synagogue Attend synagogue for prayer with the community on Shabbat.</p> <p>Havdalah and the end of Shabbat.</p> <ul style="list-style-type: none"> • Spices, wine, plaited candle and the blessing of Shabbat taken into next week. <p>Key Questions:</p> <ul style="list-style-type: none"> • Why is Shabbat important to Jews? • Why do Jews visit the synagogue on Shabbat? • Why is it important to keep traditions/customs alive? <p>Concepts: AT1: Beliefs, teachings, sources. Practices and ways of life. AT2: Identity and belonging. Meaning, purpose and truth.</p>	<p>Unit 2 – Festivals in Jewish Life</p> <p>Succot (Sukkoth)</p> <ul style="list-style-type: none"> • Festival of Tabernacles. • Celebration at home and in the Synagogue. • Story retold • Harvest. <p>Passover (Pesach)</p> <ul style="list-style-type: none"> • Story recalled: Moses and the Exodus from Egypt. • Celebration at home. • Symbolism and ritual of Seder meal – questions from youngest child. <p>Hanukkah</p> <ul style="list-style-type: none"> • Story recalled of the miracle of the oil • Celebration at home. • Symbolism of candle lighting and eating doughnuts. <p>Key Questions:</p> <ul style="list-style-type: none"> • How does what happens at each Festival help to teach young Jews about their past? • What do these festivals show about the Jews’ relationship with God? <p>Concepts: AT1: Beliefs, teachings, sources. Practices and ways of life. AT2: Identity and belonging. Meaning, purpose and truth</p>	<p>Unit 3 – Abraham</p> <p>Belief in One God</p> <ul style="list-style-type: none"> • Abram/Abraham. • Abraham and one God. • Abraham and Isaac – obedience to God. <p>Torah</p> <ul style="list-style-type: none"> • Jewish Sacred Text. • Where stories about the Jews’ relationship with God are found including the story of Abraham • Written as a scroll in Hebrew. • Treated with respect. • Yad. <p>Key Questions:</p> <ul style="list-style-type: none"> • Why is Abraham important to Jews? • How does the Torah help Jewish people to understand what being Jewish means? <p>Concepts: AT1: Beliefs, teachings, sources. Practices and ways of life. Concept of God. AT2: Identity and belonging. Meaning, purpose and truth.</p>	<p>Unit 4 – Prayer and Worship of God</p> <p>The Shema</p> <ul style="list-style-type: none"> • Said twice daily. • Preparing for prayer: Phylacteries, Tallit, Kippah. • The Shema in the Mezuzah – signifying a Jewish home. <p>Synagogue</p> <ul style="list-style-type: none"> • Ark. • Ner Tamid. • Torah portion read in services. • Role of the Rabbi. • Minyan. • Family celebrations. • Bar /Bat Mitzvah. <p>Key Questions:</p> <ul style="list-style-type: none"> • How does the Shema tell Jews to keep their religion alive? • How does the role of a Jew change after their Bar/Bat Mitzvah? • Why are the home and synagogue equally important in a Jewish person’s life? <p>Concepts: AT1: Beliefs, teachings, sources. Practices and ways of life. Concept of God. AT2: Identity and belonging. Meaning, purpose and truth.</p>
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¹ It is custom to put money in a **Tzedakah** box at a point in the weekday services as Orthodox Jews do not use money on Shabbat



Judaism in the Thematic Units

<p>The Natural World</p> <p>Jews believe in one God, The Creator, who designed the world. Jews have a responsibility for living things on the planet.</p> <p>Key Questions:</p> <ul style="list-style-type: none">• How do Jews believe the world began?• What do Jews believe about God?• What do Jews believe about human responsibility for the world? <p>Concepts:</p> <p>AT1: Beliefs, teachings. Concept of God.</p> <p>AT2: Values and commitments</p>	<p>Weddings</p> <p>Know what happens during a Jewish wedding;</p> <ul style="list-style-type: none">• Understand that the celebration is shared with family, friends and the faith community.• Know some of the symbols in a Jewish wedding.• Understand the inner meaning of a Jewish wedding. <p>Key Questions</p> <ul style="list-style-type: none">• How are Jewish weddings celebrated?• What is the importance of community/family during a wedding? <p>Concepts:</p> <p>AT1: Beliefs, teaching, sources. Practices and ways of life.</p> <p>AT2: Identity and belonging. Meaning, purpose and truth.</p>
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Judaism in the Thematic Units

<p>Peace</p> <p>Jewish prayer for Peace.</p> <p>Key Questions:</p> <ul style="list-style-type: none"> • What does peace mean to Jews? • How do Jews believe they can foster peace in their lives? <p>Concepts: AT1: Beliefs, teachings, practices. Concept of God. AT2: Meaning, purpose and truth</p>	<p>Understanding Faith and Belief in Lewisham</p> <p>The Jewish communities in Lewisham</p> <p>Key Questions:</p> <ul style="list-style-type: none"> • what can we discover about this faith in our class and school? • what can we discover about this faith in the local community and Lewisham borough? • how has the Jewish faith in Lewisham changed over the past 50 years? • what are the reasons for changes? • how do faith groups work in partnership with each other and the local community? • how has life in Lewisham been enriched by the diversity of the faiths and beliefs that make up the borough? <p>Concepts:</p> <ul style="list-style-type: none"> • AT1: Beliefs, teachings. • Practices and ways of life. • Forms of expression. • AT2: Identity and belonging. Meaning and truth. 	<p>The Journey of Life and Death</p> <p>The ways in which human experiences associated with death, loss, hope, and meaning in life are understood in Judaism.</p> <p>Key Questions:</p> <ul style="list-style-type: none"> • What do Jews believe happens after death? • How do Jews support people during times of loss? <p>Concepts: AT1: Beliefs, teachings practices. AT2: Meaning, purpose and truth</p>
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Sikhism

<p>Unit 1 – Sikh Beliefs</p> <p>Beliefs about God</p> <ul style="list-style-type: none"> • Sikhs believe in one God – symbolised by the Ik Onkar symbol. • God created all things. <p>The Gurus</p> <ul style="list-style-type: none"> • There were 10 human Gurus. • Guru Nanak was the first Guru. • Guru Nanak’s life and teaching. • Guru Nanak’s teaching that all people are equal. • Celebration of Guru Nanak’s birthday. <p>Key Questions:</p> <ul style="list-style-type: none"> • What do Sikhs believe about God? • What does Guru mean? • What does it mean to be equal? <p>Concepts:</p> <p>AT1: Beliefs, teachings, sources. Practices and ways of life.</p> <p>AT2: Identity and belonging. Meaning, purpose and truth.</p>	<p>Unit 2 – Sikh Teaching and Life</p> <p>Sikh Teaching</p> <p>Three important rules to follow:</p> <ul style="list-style-type: none"> • Work honestly. • Share food with the needy. • Remember God. • The Gurus showed how to put teachings into practice in their lives. • Story of Guru Nanak and Bhai Lalo. <p>or</p> <ul style="list-style-type: none"> • Story of Guru Gobind Singh and the Water Carrier, Bhai Ghanaya. <p>Sikh Life</p> <ul style="list-style-type: none"> • Special celebrations – naming. • Sikhs worship at home and in the Gurdwara. • The Guru Granth Sahib teaches Sikhs how to live. • Sikhs share and show that everyone is equal in the Gurdwara. <p>Key Questions:</p> <ul style="list-style-type: none"> • How do Sikhs follow rules in their lives? • What does worship mean to Sikhs? <p>Concepts:</p> <p>AT1: Beliefs, teachings, sources. Practices and ways of life.</p> <p>AT2: Identity and belonging. Meaning, purpose and truth.</p>	<p>Unit 3 – The Gurdwara and the Guru Granth Sahib – Final and Everlasting Guru</p> <p>The Gurdwara</p> <ul style="list-style-type: none"> • Centre for the community and place of prayer and worship. • Nishan Sahib and Khanda symbol. • Shoes removed, hair covered. • Role of Granthi. • Use of music. • Karah Prasad. • The Langar kitchen- shared food. <p>The Guru Granth Sahib</p> <ul style="list-style-type: none"> • Sikh holy book, final everlasting Guru • Written in Gurmurkhi. • Treated with respect as a human Guru • Contents: <ul style="list-style-type: none"> - teachings of Guru Nanak and other Gurus. - hymns and prayers that are sung in services. <p>Key Questions:</p> <ul style="list-style-type: none"> • How is the Gurdwara a centre for worship and the expression of Sikh values? • Why is the Guru Granth Sahib ‘The Everlasting Guru’? <p>Concepts:</p> <p>AT1: Beliefs, teachings, practices. Concept of God.</p> <p>AT2: Meaning, purpose and truth.</p>	<p>Unit 4 – Belonging to the Sikh Community</p> <p>Guru Gobind Singh</p> <ul style="list-style-type: none"> • The last human Guru. • Celebration of Baisakhi. • Established the Khalsa. • The 5 Ks and Sikh names. <p>Belonging to the Community</p> <ul style="list-style-type: none"> • Becoming a Khalsa’d Sikh. • Amrit ceremony. • Obligations accepted with Amrit - rehat. <p>Key Questions:</p> <ul style="list-style-type: none"> • Why was Guru Gobind Singh important? • What is the significance of the Amrit Ceremony? <p>Concepts:</p> <p>AT1: Beliefs, teachings, sources. Practices and ways of life.</p> <p>AT2: Identity and belonging. Meaning, purpose and truth.</p>
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Sikhism in the Thematic Units

<p>Belonging</p> <ul style="list-style-type: none"> • Know what is involved for a child in belonging to the Sikh religion. • Know about naming and the importance of names in Sikhism. <p>Key Question: What does it mean to belong in Sikhism?</p> <p>Concepts: AT1: Beliefs, teaching, sources. Practices and ways of life. AT2: Identity and belonging</p>	<p>Sharing Food</p> <ul style="list-style-type: none"> • Know that the Gurus taught that everyone is of equal importance. • Know the story of Guru Nanak and Bhai Lalo. <p>In the Gurdwara people share food together to show this equality.</p> <p>Key Questions:</p> <ul style="list-style-type: none"> • Why is food important for Sikhs? • What does it mean to be equal? <p>Concepts: AT1: Beliefs, teachings. Practices and ways of life. AT2: Identity and Belonging.</p>	<p>Weddings</p> <ul style="list-style-type: none"> • Know what happens during a Sikh wedding. • Understand that the celebration is shared with family, friends and the faith community. • Know some of the symbols in a Sikh wedding. • Understand the inner meaning of a Sikh wedding. <p>Key Questions:</p> <ul style="list-style-type: none"> • How are Sikh weddings celebrated? • What is the importance of community/family during a wedding? <p>Concepts: AT1: Beliefs, teaching, sources. Practices and ways of life. AT2: Identity and belonging meaning, purpose and truth.</p>	<p>The Journey of Life and Death</p> <ul style="list-style-type: none"> • The ways in which human experiences associated with death, loss, hope, and meaning in life are understood in Sikhism. <p>Key Questions:</p> <ul style="list-style-type: none"> • What do Sikhs believe happens after death? • How do Sikhs support people during times of loss? <p>Concepts: AT1: Beliefs, teachings, practices. AT2: Meaning, purpose and truth.</p>
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Key Stage 1 Units

The Natural World – statutory unit

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Optional Units:

Belonging / Who am I?

Right and Wrong

Sharing food

Weddings





The Natural World – statutory unit

<p>What this unit contains</p>	<p>This unit involves pupils in investigating patterns, rhythms in nature, change, growth and the cycle of life. It provides an opportunity to experience awe and wonder as pupils reflect on attitudes to life, living things and the world. Through this unit pupils are introduced to the belief that whilst <i>some people believe the world was a wonderful accident</i>, people of many faiths, and specifically Jews, Christians and Muslims, believe a Creator God, designed the world.</p> <p>Content includes Jewish and Christian beliefs about God as a Creator, responsibility for living things on the planet as a response to this belief, harvest thanksgivings and St Francis as an example of living a life in response to these beliefs.</p> <p>Islamic beliefs about Allah, the Creator of all things and people as the custodians of the earth.</p>																														
<p>Where the unit fits and how it builds upon previous learning</p>	<p>The unit should be taught at the start of term 1 in Year 1. It introduces pupils to beliefs in Judaism, Christianity and Islam, incorporating content from the appropriate sections of the syllabus.</p> <p>Throughout the unit pupils should be encouraged to notice change in the world around them – in the weather, in plant life around the school, in themselves and in seeds/bulbs that can be grown in class. If possible they should be encouraged to care for creatures, for example feeding fish or birds.</p>																														
<p>Extension activities and further thinking</p>	<p>Explore and respond to Christian images of creation from works of art from different periods. For example Michelangelo’s images of the Creator and His creation in the Sistine chapel.</p> <p>Find out what other members of the school community believe about how the world began</p> <p>Discuss elements of the natural world which may at first seem unappealing and consider their place in the greater scheme of things (snakes, spiders, slugs in the garden).</p> <p>Discuss other beliefs about origins held by members of the class.</p>																														
<p>Vocabulary</p> <table border="0"> <tr> <td>Create</td> <td>Christianity</td> <td>mysterious</td> <td>unique</td> </tr> <tr> <td>Creator</td> <td>Judaism</td> <td>earth</td> <td>special</td> </tr> <tr> <td>God</td> <td>Muslim</td> <td>sea</td> <td>shell</td> </tr> <tr> <td>Allah</td> <td>Islam</td> <td>sky</td> <td>feather</td> </tr> <tr> <td>dead</td> <td>make</td> <td>animal</td> <td>stone</td> </tr> <tr> <td>alive</td> <td>living</td> <td>bird</td> <td>egg</td> </tr> <tr> <td>Christian</td> <td>beautiful</td> <td>Saint Francis</td> <td></td> </tr> </table>	Create	Christianity	mysterious	unique	Creator	Judaism	earth	special	God	Muslim	sea	shell	Allah	Islam	sky	feather	dead	make	animal	stone	alive	living	bird	egg	Christian	beautiful	Saint Francis		<p>SMSC/Citizenship</p> <p>Ultimate questions about the origin of life on the planet and beliefs about a Creator who cannot be seen.</p> <p>Ways to care for the planet.</p> <p>The work of a school council and how pupils can be active members of the school community.</p>		
Create	Christianity	mysterious	unique																												
Creator	Judaism	earth	special																												
God	Muslim	sea	shell																												
Allah	Islam	sky	feather																												
dead	make	animal	stone																												
alive	living	bird	egg																												
Christian	beautiful	Saint Francis																													

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The Natural World – statutory unit

Session 1. Key Question: Where did the world and everything in it come from?

Learning objectives	A T 1	A T 2	Suggested teaching activities	Sensitivities, points to note, resources
<p>Pupils should:</p> <ul style="list-style-type: none"> know that the world contains many beautiful natural things, all of which are unique; consider that life is special and transient; consider beliefs about origins. 		<p>✓</p> <p>✓</p> <p>✓</p> <p>✓</p> <p>✓</p>	<p><i>Before the lesson prepare a collection of items from different natural environments, e.g. water, land, air. Have items derived from the natural world e.g. oil, wool, feathers, eggshells, stones, shells, seedpods, leaves, plants.</i></p> <p>Talk to the class about one object from the collection. How many different words can they suggest to describe the item? Do they know what it is and where it comes from? Introduce them to the idea that although there may be many similar items in the world, each one is unique.</p> <p>Distribute items so each pupil has one. Look closely at it and think of words to describe. Ask them: Is it dead or alive? Was it ever alive? Did anything ever live on or in it? What does it feel like? Smell like? Who made this object? Who made the first example of this object?</p> <p>Talk about the fact that some people in the world believe that everything was made by a Creator (maker) God whilst others believe the world began from a large explosion in space.</p> <p>Using a range of art materials encourage pupils to draw or paint their special item. Label pictures.</p> <p>Plenary Ask the class where the birds are that grew the feathers or the creatures that lived in the shells? Share outcomes of the lesson and display.</p>	<p>Resources Items for natural world display. Art materials – pastels, chalks, paints and a range of brushes, Paper of different colours, grades and sizes.</p> <p><i>Throughout the unit pupils should be encouraged to notice change in the world around them – in the weather, in plant life around the school, in themselves and in seeds/bulbs that you can grow in class. If possible they should be encouraged to care for creatures, for example feeding fish or birds.</i></p> <p><i>Encourage children to share what they believe about the origin of the world</i></p>

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The Natural World – statutory unit

Session 2. Key Question: What do Jews and Christians believe about the creation of the world?

Learning objectives	A T 1	A T 2	Suggested teaching activities	Sensitivities, points to note, resources
<p>Pupils should:</p> <ul style="list-style-type: none"> • know that Jews and Christians believe that the world was created by God; • know that Jews and Christians believe that people have a responsibility to care for God’s creation; • consider the need to care for the planet today; • know about conservation projects to support wildlife or the natural environment; • support the local environment and become involved in the work of the school council. 	<p>✓</p> <p>✓</p> <p>✓</p>	<p>✓</p> <p>✓</p> <p>✓</p> <p>✓</p> <p>✓</p>	<p>Watch a video or read a version of the Jewish/ Christian Creation story. As a class sequence the steps of creation and focus on the repetition of ‘it was good’. Talk about the responsibilities given to Adam and Eve in caring for the garden and naming the animals. How might they have felt?</p> <p>Show pupils images of creatures from around the world – can they recognise them? Do they know their names? Reflect on the way that Adam and Eve had so many names to choose. Do pupils know where in the world animals live?</p> <p>Explain that some creatures are finding it hard to live and people are trying to help them to survive. Show pupils information about a conservation charity and link to human responsibilities as carers for the world. How might Adam and Eve feel about this project?</p> <p>This lesson could link to local conservation work or the need for it in and around the school grounds. Groups of pupils could formulate rules for caring for part of the school grounds. The class could then decide which rules are the best and make a class list and some posters to encourage others to keep the rules.</p> <p>They could take this work to the school council as a proposition for the school to consider following or developing.</p>	<p>Resources</p> <p>Video / DVD: Creation Stories – Quest, Channel 4 (www.tts-group.co.uk/quest-creation-stories-dvd/1004017.html)</p> <p>Christian creation story retold. e.g. The Creation by James Weldon Johnson – https://www.youtube.com/watch?v=jehhUNgXUBY</p> <p>Images of creatures from around the world including large, small, nocturnal, reptiles, mammals, fish, birds. Include some animals that are ‘endangered’. Charity information about saving endangered creatures, e.g. whales, dolphins, orangutans, tigers.</p>

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The Natural World – statutory unit

Session 3. Key Question: How do Christians thank God for the world? How do they show their care for other people?

Learning objectives	A T 1	A T 2	Suggested teaching activities	Sensitivities, points to note, resources
<p>Pupils should:</p> <ul style="list-style-type: none"> • know that Christians celebrate Harvest festivals to thank God for His creation; • know that at harvest Christians remember that humans are dependent on the weather and nature for the food and drink needed to survive; • know that Christians often use harvest as a way to share food with those less fortunate than themselves. 	<p>✓</p> <p>✓</p> <p>✓</p> <p>✓</p>	<p></p> <p>✓</p> <p>✓</p> <p>✓</p>	<p>Either:</p> <p>Watch the film of children from Bushey Baptist church collecting and distributing items for the community at harvest. Invite a local Christian into the class to talk about harvest in their church - why and how it is celebrated and is an opportunity to share with others.</p> <p>Visit a local church to see it decorated for harvest and hear how harvest is a time when Christians thank God and share with others.</p> <p>Read a harvest story and consider what contributes to the plants growing and how at harvest Christians thank God for ensuring the harvest is good.</p> <p>Make a harvest loaf in class in the shape of ears of corn. Explain how the ingredients have been dependent on nature and that at harvest Christians thank God for the way He provides for their needs.</p> <p>5. Find out about environmental charities.</p> <p>After the lesson either organise a charitable collection or link the school's Harvest celebration to donations for local charities for the less fortunate or the work of the local Food Bank.</p>	<p>Resources</p> <p>'The Tiny Seed' by Eric Carle 'Ears and the Secret Song' by Meryl Doney (Lion)</p> <p>BBC Active DVD Celebrations and Special Times. https://www.tts-group.co.uk/celebrations-and-special-times-cd-rom-bbc/1003510.html</p>

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The Natural World – statutory unit

Session 4. Key Question: How did St. Francis show his thanks to God for His creation?

Learning objectives	A T 1	A T 2	Suggested teaching activities	Sensitivities, points to note, resources
<p>Pupils should:</p> <ul style="list-style-type: none"> know why St Francis is a Christian example of caring for and protecting living things; know St Francis' canticle to the sun from 'The Circle of Days'; consider ways that they can think of and help others. 	<p>✓</p> <p>✓</p> <p>✓</p> <p>✓</p> <p>✓</p>	<p>✓</p> <p>✓</p> <p>✓</p> <p>✓</p>	<p>Talk about how sometimes people's beliefs make them choose to live in particular ways. Ask pupils for any examples they may know such as following food rules, celebrating festivals, working for charities.</p> <p>Read with pupils the story of the life of St Francis, an example of someone who tried to follow Jesus' teachings. Explain that the title 'Saint' is sometimes given to Christians who have lived particularly special lives.</p> <p>Discuss why Francis gave up his rich clothes and lifestyle to live simply. How hard might that have been for him and his friends?</p> <p>Read the 'Circle of Days' and talk about what it tells about St Francis' beliefs about the natural world.</p> <p>Discuss how the story and Francis' words show that Francis was determined that he would follow Jesus' teachings and be peace – loving, kind and thoughtful to everyone and every creature.</p> <p>Make a class list of times when people have behaved kindly or when others have been kind and thoughtful to them. Initiate a class 'thoughtfulness' award to give to members of the class to wear for a day if they have been particularly thoughtful or kind to others.</p>	<p>Resources Stories about St Francis, e.g. from RE-tell Stories volume 5 – Lewisham Education</p> <p>'St Francis' by Wildsmith, Oxford</p> <p>'Lives and Times St Francis' (big book) Heinemann</p> <p>'The Circle of Days' by Reeve Lindbergh, Candlewick Press ISBN-13: 978-0763603571 Pictures of Franciscan friars Pictures of animals</p> <p>https://www.youtube.com/watch?v=bqD6fUHIFBY</p>

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The Natural World – statutory unit

Session 5. Key Question: What do Muslims believe about the creation of the world?

Learning objectives	A T 1	A T 2	Suggested teaching activities	Sensitivities, points to note, resources
<p>Pupils should:</p> <ul style="list-style-type: none"> know that Muslims believe Allah is the Creator of all things; know that Muslims respect and appreciate everything that Allah created and believe that people are the custodians of the earth; know that many Muslims do not draw human beings or creatures. 	<p>✓</p> <p>✓</p> <p>✓</p> <p>✓</p> <p>✓</p>	<p></p> <p></p> <p></p> <p></p> <p>✓</p>	<p>Show pupils the star and crescent symbol and explain that in this lesson they are going to find out about what Muslims believe about where everything in the world came from.</p> <p>Watch the part of the first Islam programme from the Pathways of Belief video that explains about Muslim beliefs about creation. Afterwards draw out the new vocabulary that pupils have encountered and clarify their understanding.</p> <p>Show pupils the beautiful images inspired by nature that can be found in the Muslim world. Explain that many Muslims believe that humans should not be drawn or produced in other art media but that respect is shown to Allah’s creation and it is celebrated in many decorative ways.</p> <p>Explain that Muslims thank Allah for His wonderful creation. Show pupils the prayer mat and explain that this is often used to kneel on during prayer, to provide a clean place to pray.</p> <p>Assessment task Either draw flowers or plants from around the class/ school or do bark or leaf rubbings and use these to make small paper prayer mats that show how much Muslims recall Allah’s creation and thank Him in their prayers. Label to explain what Muslims believe about creation and display outcomes.</p>	<p>Resources</p> <p>Notes to Teachers: The use of the star and crescent symbol in this lesson is to make clear to pupils that during this lesson they are learning about the Muslim faith. This is not a universally accepted symbol of Islam.</p>

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The Natural World – statutory unit

Session 6. Key Question: How should we care for the world?

Learning objectives	A T 1	A T 2	Suggested teaching activities	Sensitivities, points to note, resources
<p>Pupils should:</p> <ul style="list-style-type: none"> reflect on attitudes to life, living things and the world; identify living things in the environment that they can care for and protect; recognise their roles and responsibilities in caring for the world. 	<p>✓</p> <p>✓</p> <p>✓</p> <p>✓</p>	<p>✓</p> <p>✓</p> <p>✓</p> <p>✓</p>	<p>Consider how pupils feel when they have made something that they are proud of. How do they feel if someone spoils or damages it?</p> <p>Design an area of the school that can be either part of the natural world or can incorporate part of the natural world and can be used for quiet reflection. This could be a focus about how special the world is or can be used as a memory garden or a place where people can go if they want to think about something. This could link to Islamic beliefs about the garden of Paradise.</p> <p>If making a garden area is not possible, you might develop some tubs or window boxes or even set up a bird table to help the local birds.</p> <p>Make up a code of conduct for that area. How could it best be shared with others/kept in a good state?</p> <p>Link to Jewish, Christian and Muslim beliefs and explain that other faiths and beliefs have different stories to explain how the world began.</p> <p>Take proposals to the school council.</p>	<p>Resources</p> <p>Materials for design project.</p> <p><i>Throughout the unit pupils should be encouraged to notice change in the world around them – in the weather, in plant life around the school, in themselves and in seeds / bulbs that you can grow in class. If possible, they should be encouraged to care for creatures, for example feeding fish or birds.</i></p>

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Belonging / Who am I?

<p>What this unit contains</p>	<p>In this unit pupils draw on their understanding of what it means to belong, and then relate it to how children are given a sense of belonging in four religions: Christianity, Islam, Hinduism and Sikhism. Pupils investigate how children are welcomed into different religions. They think about how people show they belong and what is special for them about belonging.</p>																																										
<p>Where the unit fits and how it builds upon previous learning</p>	<p>This unit should be taught as an optional unit in KS1. It includes a focus on elements from the local Agreed Syllabus on symbol and dress. Through this unit pupils will focus on a number of Key Questions and begin to deepen the knowledge they have already gained from their life experiences, and begin to build on their depth and knowledge of understanding of peoples' lives within each faith or belief to support the curriculum at KS2.</p>																																										
<p>Extension activities and further thinking</p>	<ul style="list-style-type: none"> • Complete a piece of writing about what it means to belong to a religion they have studied or another faith or belief to which they belong themselves. • Write about what it feels like to not belong and how people should help someone who is lonely. • Consider why people who believe in a faith come together in groups to worship and share time. 																																										
<p>Vocabulary</p> <table border="0"> <tr> <td>belonging</td> <td>Islam</td> <td>Hinduism</td> <td>temple</td> </tr> <tr> <td>family</td> <td>Qur'an</td> <td>Brahman</td> <td>Christianity</td> </tr> <tr> <td>worship</td> <td>Surah</td> <td>Rama</td> <td>Cross</td> </tr> <tr> <td>naming ceremony</td> <td>Hadith</td> <td>Sita</td> <td>Bible</td> </tr> <tr> <td>Sikhism</td> <td>prayer mat</td> <td>Murti</td> <td>baptism</td> </tr> <tr> <td>Gurdwara</td> <td>Adhan</td> <td>Puja</td> <td>Church</td> </tr> <tr> <td>Five 'K's</td> <td>Aqiqah</td> <td>shrine</td> <td>chapel</td> </tr> <tr> <td>Guru Granth Sahib</td> <td>Bismillah</td> <td>Vedas</td> <td>clerical collar</td> </tr> <tr> <td>Kaur</td> <td>Mosque</td> <td>Namakaran</td> <td>Humanism</td> </tr> <tr> <td>Singh</td> <td>Muhammad (pbuh)</td> <td>Ganesh</td> <td></td> </tr> </table>	belonging	Islam	Hinduism	temple	family	Qur'an	Brahman	Christianity	worship	Surah	Rama	Cross	naming ceremony	Hadith	Sita	Bible	Sikhism	prayer mat	Murti	baptism	Gurdwara	Adhan	Puja	Church	Five 'K's	Aqiqah	shrine	chapel	Guru Granth Sahib	Bismillah	Vedas	clerical collar	Kaur	Mosque	Namakaran	Humanism	Singh	Muhammad (pbuh)	Ganesh		<p>SMSC/Citizenship</p> <ul style="list-style-type: none"> • How religious or belief groups show they take responsibility for others. • The duty of members of religions or beliefs to care for everyone. • How people belong to a range of different groups within the wider community including a faith or belief group. 		
belonging	Islam	Hinduism	temple																																								
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Singh	Muhammad (pbuh)	Ganesh																																									

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Belonging / Who am I?

Session 1. Key Question: What does it mean to belong?

Learning objectives	A T 1	A T 2	Suggested teaching activities	Sensitivities, points to note, resources
<p>Pupils should:</p> <ul style="list-style-type: none"> • explore ways in which they belong; • learn how belonging is expressed and made explicit; • understand the importance of belonging to a group or groups. 		<ul style="list-style-type: none"> ✓ ✓ ✓ ✓ ✓ ✓ 	<p><i>Prior to the lesson arrange for the class to bring in an example of uniforms of different groups they belong to e.g. brownies, football teams. Ideally pupils should sit in these groups. Children who do not belong to activity groups will belong to a 'class' group representing the class and school. Alternatively pictures can be presented.</i></p> <p>Class teacher could present the class with a poster of his/her own belonging mind map, or web. Explain to the children how an individual can belong to different groups, i.e. family, mothers, women, parents, colleges, social clubs ... (Resource sheet)</p> <p>Talk about how by belonging to the class each of them already belongs to a group. They are members of the school, possibly show a school photograph and also a member of their class (show a class photograph), as well as being members of their other entirely different groups outside school.</p> <p>In the groups where they are sitting pupils can create either a mind map or Venn diagram to show what they already know about the groups members of the class belong to. They can send ambassadors to other tables to ask questions to inform their work.</p> <p>As a class discuss how they show they belong to their different groups / clubs e.g. by wearing a uniform, badge etc. Pupils can draw a badge or item of uniform and label with what it means to them. During the lesson the digital camera should be available so that pictures can be taken for a wall display.</p> <p>In pairs within their group pupils share what they like about belonging to a group/club and what they do when they are meeting together. Are there any group rules they are expected to follow?</p> <p>Plenary: Discuss what pupils think it means to belong in terms of benefits and responsibilities.</p>	<p>Resources Digital camera School photograph Class photograph School badge Access to PC Photos of different groups that may not be represented. Session 1 Resource Sheet. <i>When using the Resource sheet be sensitive to family backgrounds of children in the group.</i></p>



Belonging / Who am I?

Session 2. Key Question: What does it mean to belong to a family?

Learning objectives	A T 1	A T 2	Suggested teaching activities	Sensitivities, points to note, resources
<p>Pupils should:</p> <ul style="list-style-type: none"> understand the concept of belonging to a family; understand the concept of belonging to a faith family. 	<p>✓</p> <p>✓</p> <p>✓</p> <p>✓</p> <p>✓</p> <p>✓</p>	<p>✓</p> <p>✓</p> <p>✓</p> <p>✓</p> <p>✓</p> <p>✓</p>	<p>Prior to the lesson send a letter home asking the children to bring in family group photos they may have at home.</p> <p>Discuss with pupils the concept of belonging to a family and what it means to them. (Ensure this is done inclusively so that all pupils feel that their family experience is valid).</p> <p>Look at a pre-drawn family tree. Within a class there will be many variations, so try to keep to a simple one. Discuss this with the pupils. They could then complete their own family trees using a template.</p> <p>Look at the Different Families: Same Love poster and discuss the variety of family types with students.</p> <p>If possible get a member of a child's family to come in and talk about what belonging to a family means to them and how each person is valued. If not possible, the classroom assistant or another adult could do this for the class.</p> <p>Discuss with the class other people who are important in their families, but who are not on the family tree. In pairs get the pupils to talk about how they contribute to their family.</p> <p>Introduce the idea that people who believe in God belong to a family too – a religious family. Explain that they do things together to show that they belong. Introduce the names of the faiths to be featured in the following lessons.</p>	<p>Resources</p> <p>Completed family tree – could be teacher's own or the family tree attached to this unit.</p> <p>Blank family tree</p> <p>Different Families: Same Love poster:</p> <p>https://www.stonewall.org.uk/resources/different-families-same-love-poster</p> <p>Names and symbols for:</p> <p>Christianity – Christian</p> <p>Sikhism – Sikh</p> <p>Islam – Muslim</p> <p>Hinduism – Hindu</p> <p>Notes for teachers:</p> <p>Sensitivity</p> <p><i>Teachers need to be sensitive towards the different kinds of family structures represented in their class.</i></p> <p>Prior to the next lesson do a class audit of the pupils' faiths.</p>

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Belonging / Who am I?

Session 4. Key Question: What happens to a child when they join a religious family?

Learning objectives	A T 1	A T 2	Suggested teaching activities	Sensitivities, points to note, resources
<p>Pupils should:</p> <ul style="list-style-type: none"> understand the concept of belonging to a family; understand the concept of belonging to a faith family. 	<p>✓</p> <p>✓</p> <p>✓</p> <p>✓</p>	<p>✓</p> <p>✓</p> <p>✓</p> <p>✓</p>	<p>Pupils should work in the same groups as last week.</p> <p>Show the class a short clip from a video/DVD of a christening/infant baptism, a naming ceremony (Humanist, Muslim or Sikh) 'Namakaran' (Hindu naming ceremony).</p> <p>Ask the pupils to share their experiences about any of these ceremonies which they might have attended. Pupils might wish to bring in any gifts they received at their own initiation ceremony to share with the class.</p> <p>In groups they should begin to explore these initiation ceremonies in more depth, using the research sheet to guide them.</p> <p>Notes should be made to help them feedback and these can be added to the poster.</p> <p>Plenary: All groups to feedback to the class. Ask the questions: How do these ceremonies show that the religious and non-religious communities are welcoming this person not just the individual family? Why is it important and does a public ceremony like this need to take place?</p>	<p>Resources</p> <p>Research Sheet 2 Digital camera Books CD's Video clip of a baptism from Espresso LgFL 'Faiths' or BBC Video/DVD 'Places for Worship' Video/DVD clip from 'Pathways of Belief 'Sikhism: Sikh naming ceremony BBC Active DVD 'Rites of Passage' sections on Belonging DVD's Digital camera Picture of a font Video of a humanist naming ceremony: http://understandinghumanism.org.uk/uhtheme/celebrations-and-ceremonies/</p>

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Session 5. Key Question: How do children belong to a religious family?

Learning objectives	A T 1	A T 2	Suggested teaching activities	Sensitivities, points to note, resources
<p>Pupils should:</p> <ul style="list-style-type: none"> know what is involved for a child in belonging to a religion. 	<p>✓</p> <p>✓</p> <p>✓</p> <p>✓</p>	<p>✓</p> <p>✓</p> <p>✓</p> <p>✓</p>	<p>The children should work in the same groups as previous weeks. Quickly recap on the work covered last week to help them.</p> <p>Ask pupils if there are any activities which they do at home that are to do with their religion e.g. Christian families saying grace, daily Bible readings, prayers, family Christmas activities, Sikh family prayers, Hindu daily worship / puja at a home shrine, Muslim prayer, reading the Qur'an.</p> <p>In groups using pictures and books pupils should deepen their understanding of how families might worship together at home or in their place of worship and the part children might take in the worship. They can use Research sheet 3 to assist them. This will also be helpful to them in their feedback to the remainder of the class.</p> <p>Report back, within groups, to the class about their learning. This part can also be used as an opportunity for pupils in the other groups to ask questions.</p>	<p>Resources</p> <p>Research Sheet 3 Books Posters Digital camera Espresso/LgFL 'Faiths' BBC Active DVD 'Beliefs and Belonging'.</p>



Belonging / Who am I?

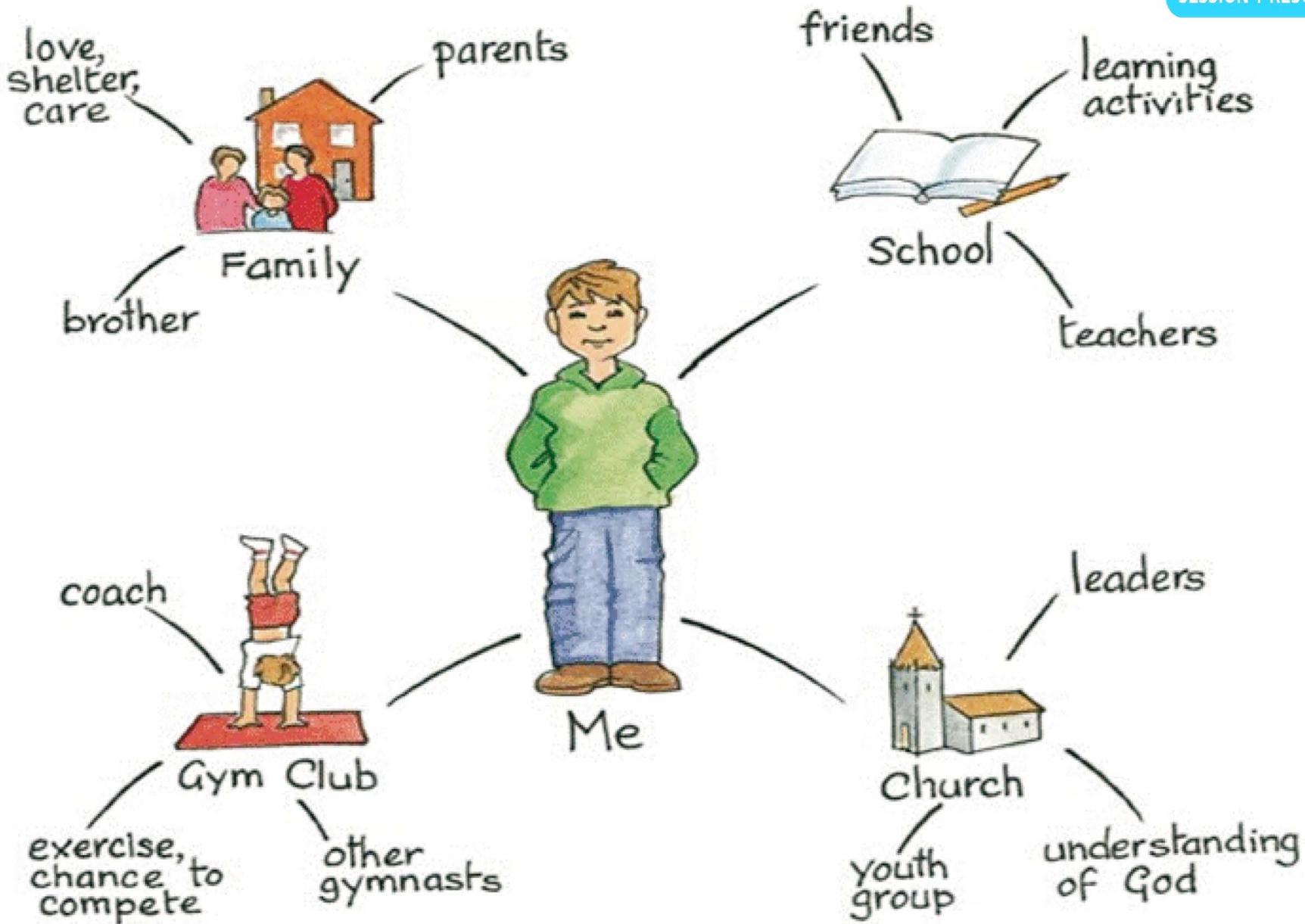
Session 6. Key Question: What have we learnt about the importance of belonging to a religious family?

Learning objectives	A T 1	A T 2	Suggested teaching activities	Sensitivities, points to note, resources
<p>Pupils should:</p> <ul style="list-style-type: none"> know how people show they belong to a religion; understand what is special about belonging; understand about the ideas of being special. 	<p>✓</p> <p>✓</p> <p>✓</p> <p>✓</p>	<p>✓</p> <p>✓</p> <p>✓</p> <p>✓</p>	<p>Pupils should work in the same groups as previous weeks.</p> <p>Explain to pupils that this week they are going to produce, edit and publish their project into a book about the faith they have been studying over the previous weeks. They can use all the notes they have made in their feedback, but it should contain something about clothing, joining and worship within the faith family.</p> <p>Explain that the book should be a mixture of drawings, which might be annotated and short pieces of writing, perhaps two or three sentences.</p> <p>Groups to work independently to complete the task, sharing with the class their work at the end.</p> <p>Pupils can be share these books with another class or in an assembly, possibly with parents depending on arrangements within the school.</p> <p>Plenary: Present the books at the front of the class. Tell the children about the TV programme 'Through the Keyhole' Using artefacts or pictures introduce some things that may have been seen if children look through a keyhole. Class teacher to ask the children 'Which religious family home might this be?' Children to identify through their gained knowledge which faith can be identified by the religious objects.</p>	<p>Resources Books Digital Camera Posters Research Sheets from previous weeks</p> <p>It is important that pupils recognise that they do not have to belong to a faith or belief community. There are many ways to belong and we can belong to groups that cross over religious and belief groups. We can form our own identities.</p>

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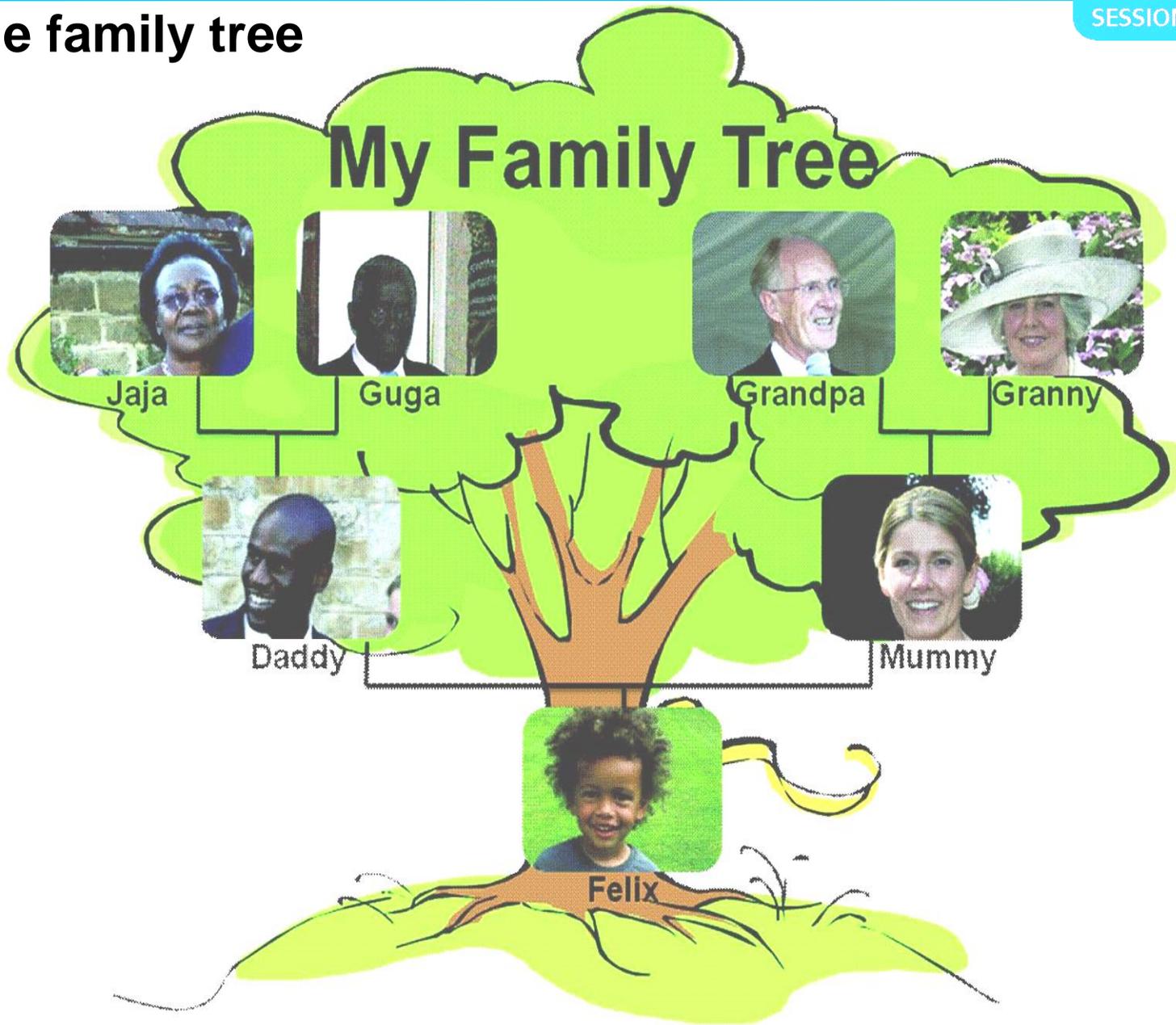
Belonging / Who am I?





Belonging / Who am I?

Example family tree



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Belonging / Who am I?

SESSION 3

Research Sheet 1

1. In the faith that you are studying, what clothes or religious jewellery do people wear that show they belong to their faith community?
2. What are these items called?
3. What do these items of clothing or religious jewellery mean to the people wearing them?
4. Draw and label these items. Each member of your group should draw a different item if possible.
5. Can you find out more about these items?

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SESSION 3

Research Sheet 2

1. Name the ceremonies that introduce children or young people to their faith community.
2. Why do these ceremonies happen?
3. Make some notes for your feedback.

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Research Sheet 3

1. What is the name of the special building used by the people of this faith?
2. Can you collect and present any pictures of your special building?
3. What might families do at home to worship?
4. When might families go to a place of worship together and why?
5. Within the faith you are studying how are children involved?



Right and Wrong

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<p>What this unit contains</p>	<p>This optional unit provides an opportunity to consider what pupils consider as right and wrong behaviour and how this relates to living in groups. Pupils should talk about rules and their necessity for living in a group. They should share their feelings about saying sorry and talk about how they feel when others apologise to them. Pupils should consider what forgiveness means and talk about their readiness to forgive. They should think about the common values of different faiths and beliefs in relation to rules about behaviour towards others, making sure children appreciate that you do not need to be a member of a faith to have a moral outlook to life. The unit includes: Jewish and Christian beliefs about God’s Ten Commandments, particularly the two greatest Commandments, loving God and loving your neighbour and stories about Jesus teaching and demonstrating these. Buddhism: The teaching of the Buddha about how to live. The importance of being kind, generous, truthful, loving, helpful and patient through the story of the Lion and the Jackal from the Jataka tales. Understanding that Buddhists believe that actions have consequences. <i>Or</i> Islam: The importance of respect for self and others. Honesty and kindness. Story of Prophet Muhammad (pbuh) and the Old Woman demonstrating the example of Prophet Muhammad (pbuh).</p>																																		
<p>Where the unit fits and how it builds upon previous learning</p>	<p>This optional unit should be taught at the start of term 1 in Year 2 if chosen. It introduces pupils to beliefs in Judaism, Christianity, Buddhism and Islam.</p>																																		
<p>Extension activities and further thinking</p>	<ul style="list-style-type: none"> • Find out about how the importance of the Ten Commandments in the Jewish faith is shown by their place over the Ark in the synagogue. • Examine different rules followed in the homes of members of the class. • Tell the story of the starfish and discuss how Humanists believe empathy and considering consequences help them to consider issues of right and wrong. https://eventsforchange.wordpress.com/2011/06/05/the-starfish-story-one-step-towards-changing-the-world/ or https://www.youtube.com/watch?feature=youtu.be&v=Z-aVMdJ3Aok&app=desktop 																																		
<p>Vocabulary</p> <table border="0"> <tr> <td>right</td> <td>honesty</td> <td>important</td> <td>Buddhism</td> </tr> <tr> <td>wrong</td> <td>respect</td> <td>Bible</td> <td>Buddha</td> </tr> <tr> <td>forgiveness</td> <td>fairness</td> <td>Old Testament</td> <td>Prophet</td> </tr> <tr> <td>sorry</td> <td>love</td> <td>New Testament</td> <td>Muhammad (pbuh)</td> </tr> <tr> <td>apologise</td> <td>care</td> <td>Jesus</td> <td>lion</td> </tr> <tr> <td>punishment</td> <td>neighbour</td> <td>Samaritan</td> <td>jackal</td> </tr> <tr> <td>mistake</td> <td>friend</td> <td>compassion</td> <td>Qur’an</td> </tr> <tr> <td>rules</td> <td>Commandment</td> <td>kindness</td> <td></td> </tr> </table>	right	honesty	important	Buddhism	wrong	respect	Bible	Buddha	forgiveness	fairness	Old Testament	Prophet	sorry	love	New Testament	Muhammad (pbuh)	apologise	care	Jesus	lion	punishment	neighbour	Samaritan	jackal	mistake	friend	compassion	Qur’an	rules	Commandment	kindness		<p>SMSC/Citizenship</p> <ul style="list-style-type: none"> • Rules are important in making society work. • Some people live their life by religious rules. • Some religions believe God wants human beings to follow particular rules. • There are different rules in society which include the law. 		
right	honesty	important	Buddhism																																
wrong	respect	Bible	Buddha																																
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Right and Wrong

**Session 1. Key Questions: How important is it for groups of people to have rules for how they behave?
How important is it for people to agree on the rules?**

Learning objectives	A T 1	A T 2	Suggested teaching activities	Sensitivities, points to note, resources
<p>Pupils should:</p> <ul style="list-style-type: none"> • consider what is right and wrong behaviour; • consider why it is important for people to have rules when with others. 		<p>✓</p> <p>✓</p> <p>✓</p> <p>✓</p>	<p>Using the right and wrong situation cards provided either as a whole class or in small groups, discuss whether each behaviour described is right or wrong. Some will be hard to put into these categories – so talk about them and why they are hard to categorise.</p> <p>Why is it better for everyone if there are some rules that everyone follows? Talk about some of the situations or school specific rules e.g. walking on the left up and downstairs, not running, being polite.</p> <p>Develop a class set of rules for behaviour either in the class, school grounds or in the dinner hall. Try to word in a positive way, e.g. ‘Don’t be unkind to others’ would be written as ‘Be kind to others’. Is it important that everyone agrees to these rules? If not, why not?</p> <p>Design a poster either alone or in pairs to illustrate one of the rules.</p> <p>Plenary: Share poster ideas with each other and feed back positively to each other’s ideas.</p>	<p>Resources Right and wrong situation cards.</p>

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Right and Wrong

Session 2. Key Questions: Why are there punishments when people break rules? Should people be forgiven if they are sorry?

Learning objectives	A T 1	A T 2	Suggested teaching activities	Sensitivities, points to note, resources
<p>Pupils should:</p> <ul style="list-style-type: none"> know what happens when rules are broken; consider why it is important to say sorry when rules have been broken. 		<p>✓</p> <p>✓</p> <p>✓</p> <p>✓</p>	<p>Read out the scenarios which involve children showing wrong behaviour. In pairs ask children to consider what should be done to those children who have broken rules.</p> <p>Get pairs of children to act out one of the scenarios. Children should decide who is breaking the rule and who is deciding what is to be done. What rule has been broken in each scenario? How are those who have broken rules punished? Is it important that there they are punished? If so, why?</p> <p>Think about each of the scenarios acted out. Should wrong behaviour be forgiven if the children involved are sorry? Should there still be a punishment if children have apologised? Get pairs of children to act out one of the scenarios again, but this time the child who has broken the rules either agrees or refuses to say sorry. As a whole class discuss which children should be forgiven, the children who agree to apologise or the children who refuse and why?</p> <p>Plenary: As a class discuss situations when it would be easy to forgive someone and situations when it would be difficult to forgive someone.</p>	<p>Resources Scenario cards.</p>

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Right and Wrong

Session 3. Key Question: What are some of the rules by which Christians believe they should live life?

Learning objectives	A T 1	A T 2	Suggested teaching activities	Sensitivities, points to note, resources
<p>Pupils should:</p> <ul style="list-style-type: none"> know that the Ten Commandments taught people how to behave towards God and each other; Know that Jesus summarised these to help people into two great Commandments using another Jewish text. 	<p>✓</p> <p>✓</p> <p>✓</p> <p>✓</p>	<p>✓</p> <p>✓</p>	<p>Introduce the story of Moses taking the children of Israel out of Egypt where they were slaves and taking them into the desert where they spent several years wandering. In the desert were some mountains and God told Moses to come up the mountain where he gave him ten special rules for the people to follow in their community.</p> <p>Show children a video / DVD describing 'The Ten Commandments' or tell the story; then, using the Ten Commandments for children sheet, focus on the content of the Commandments. Which are about how people should behave towards each other and which of the Ten Commandments are about how they should behave towards God?</p> <p>Discuss why it is important not to steal or envy etc. Do pupils think there are any rules that should be in there and are missing? Briefly write their own rules to add to the Ten Commandments.</p> <p>Which two of the Ten Commandments do children think are most important? Discuss children's responses. Find what Jesus said about the two greatest Commandments in the Gospel of Matthew. These two were from Jewish law too. Discuss why Jesus considered them to be the most important ones.</p> <p>Explain that the second of these commandments, 'The Golden Rule' can be found in religions and beliefs all over the world and is admired by many religious and non-religious people.</p>	<p>Resources BBC. 'Pathways of Belief'. The Bible. Video Plus/DVD.</p> <p>Ten Commandments for children sheet Two Greatest Commandments sheet</p>



Right and Wrong

Session 4. Key Question: How should people treat others?

Learning objectives	A T 1	A T 2	Suggested teaching activities	Sensitivities, points to note, resources
<p>Pupils should:</p> <ul style="list-style-type: none"> consider ways to address issues such as racism, name-calling and bullying; encourage positive behaviour such as by helping others, standing up for people who are being treated unkindly or by setting a good example. 	<p>✓</p> <p>✓</p> <p>✓</p>	<p>✓</p> <p>✓</p> <p>✓</p>	<p>Either read, or watch the story from the Bible of the Good Samaritan, where Jesus told people about the qualities people should show to each other (Luke 10:25-37). Recreate the story in a modern context through a storyboard or drama to demonstrate an understanding of the inner meaning.</p> <p>What do children know about racism, name-calling and bullying? Do children think these are examples of right or wrong behaviour? Ask children to consider what effect these types of behaviour have on others. How might these link to the way the man was treated in the story?</p> <p>Talk about right behaviour such as helping others, standing up to people who are being treated unkindly and setting a good example. Can children think of situations when they can help others, when they can stand up to people who are being treated unkindly and when they can set a good example? List examples. Ask children to think about a time when they have shown an example of these types of behaviours and illustrate. What words can they use to encourage others to behave in similar ways? Children to write encouraging words above their illustrations.</p> <p>Plenary: Make a 'Good Samaritan' or 'Good Neighbour' award that can be given to the child who best puts the message of the story into practice.</p>	<p>Resources <i>Teachers might like to devise an alternative approach using the Sikh story of the Guru and the Water Carrier</i></p>



Right and Wrong

Session 5. Key Question: How does Buddhism teach how you should treat others?

Learning objectives	A T 1	A T 2	Suggested teaching activities	Sensitivities, points to note, resources
<p>Pupils should:</p> <ul style="list-style-type: none"> • know the story of the Lion and the Jackal; • understand the message of the story, that actions have consequences and that good actions have good consequences. 	<p>✓</p> <p>✓</p> <p>✓</p> <p>✓</p>	<p>✓</p> <p>✓</p> <p>✓</p> <p>✓</p>	<p>Read or watch the story of the Lion and the Jackal, explaining that this is a Buddhist story with an inner meaning. Explain that the Buddha taught people how to behave through stories.</p> <p>With the pupils talk about how the story is about helping others, about telling lies and about saying sorry.</p> <p>Pupils should write about either:</p> <ul style="list-style-type: none"> • How you thank people who help you • How you feel when people say things about you that are not true or • A time when you were sorry about something and how you said or showed you were sorry for what you had done. <p>Plenary: Expand on the Buddhist beliefs that actions have consequences. Whose actions in the story had which consequences?</p>	<p>Resources <i>The Lion and the Jackal</i> by Adiccabandhu and Padmasri. Clearvision Trust/Windhorse Publications Or Video/DVD version of the story on 'The Monkey King' video/DVD from</p> <p>https://www.clearvision.org/Schools/Teachers/KS1.aspx</p> <p>Clearvision Trust https://www.clearvision.org/Home/Home.aspx</p>

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Right and Wrong

Session 6. Key Question: How does Islam teach how you should treat others?

Learning objectives	A T 1	A T 2	Suggested teaching activities	Sensitivities, points to note, resources
<p>Pupils should:</p> <ul style="list-style-type: none"> know that as well as the Qur'an Muslims also learn about how to behave through stories about Prophet Muhammad (pbuh); understand the message of the story of Prophet Muhammad (pbuh) and the Old Woman; recognise their values about behaviour and those of others. 	<p>✓</p> <p>✓</p> <p>✓</p> <p>✓</p>	<p>✓</p> <p>✓</p> <p>✓</p>	<p>Read or watch the story of Prophet Muhammad (pbuh) and the Old Woman, explaining that this is a Muslim story with an inner meaning. Explain that as well as learning how to behave from their holy book, the Qur'an, Muslims also learn from stories about how Prophet Muhammad (pbuh) set them a good example. The Hadith and Surah, accounts and traditions of the Prophet's life are essential guidance to Muslims.</p> <p>After watching the film think about how you would describe Prophet Muhammad's (pbuh) character. Muslims believe he was chosen by Allah to receive the message that is written in the Qur'an because he was such a good person. How can you see that in this story?</p> <p>Discuss and record answers to these two questions:</p> <ol style="list-style-type: none"> What might have happened if Prophet Muhammad (pbuh) had not gone upstairs in the story? What message did Muhammad (pbuh) give to the old woman about how Allah expected people to behave? <p>Plenary: How are the ideas about behaviour in the religions and beliefs studied similar and how different? How are the ways that these religions and beliefs say people should behave the same as those of members of the class and how different?</p>	<p>Resources 'Pathways of Belief' Islam: Programme 1</p> <p>https://keluargaahmadblog.files.wordpress.com/2017/03/prophet-muhammad-and-the-old-woman.pdf</p>



Right and Wrong

SESSION 1

Right and Wrong situation cards

<p>Swapping food from your packed lunch with someone else's because you think it would be nicer.</p>	<p>Taking home a pencil from school.</p>	<p>Breaking something and hiding it or not owning up and getting other people into trouble.</p>	<p>Not washing up your paintbrush and paint pot after art or not putting your reading book away in the right place.</p>
<p>Running through the corridors.</p>	<p>Owning up if you have done something wrong and got other people into trouble.</p>	<p>Saying sorry if you've hurt someone's feelings.</p>	<p>Owning up if your goal was offside and no-one saw it.</p>
<p>Speaking with your mouth full.</p>	<p>Telling a teacher if someone else has done something wrong.</p>	<p>Listening to the teacher whilst talking.</p>	<p>Forgiving someone if they have apologised after accidentally bumping into you.</p>

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Right and Wrong

SESSION 2

Right and Wrong scenario cards

A lunchtime supervisor catches a group of Year 3 children ganging up on a Year 1 child in a corner of the playground at lunchtime. They have been punching and kicking the Year 1 child and making threats to 'get' them after school. What should the dinner lady do?

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A child is helping to sharpen pencils in the classroom during morning play. After writing on the flipchart the teacher turns around and catches the child putting a rubber from someone else's pencil case into his or her own pocket. What should the teacher do?

Two children have a fight in the cloakroom. The teacher breaks up the fight up and asks other children in the class if they saw who started it? One child sticks up for his or her friend and says that the other child started it by pushing their friend over as he was getting his coat. The teacher finds out that this is not true. What should the teacher do?



Right and Wrong

SESSION 3

The Ten Commandments for children

The first commandment is to put *God* first. This means that nothing should be more important than *God* - a hobby you enjoy, tv or computer games, even your friends and family should not be more important than *God*.

The second commandment is to worship only *God*. This is like the first commandment in that people following this commandment should not bow down and worship a statue.

The third commandment is to use *God's* name with respect. Many people use *God's* name like a swear word, or say it when they're upset. *God* asked people to use His name when we're talking to Him, or talking about Him in a nice way.

The fourth commandment is to remember *God's* Sabbath. *God* wanted people to take one day of the week and rest. When *God* made the world in six days, He rested on the seventh day.

The fifth commandment was to respect parents.

The sixth commandment says don't hurt others.

The seventh commandment is for those who are married and tells people to be faithful to their partner in marriage.

The eighth commandment is don't steal. This means that we shouldn't take something that doesn't belong to us.

The ninth commandment is don't lie.

The tenth commandment is don't be envious of others. This means that people shouldn't wish to have things that someone else has.



Right and Wrong

SESSION 4

The Two Greatest Commandments

And he said to him, ‘You shall love the Lord your God with all your heart, and with all your soul, and with all your mind. This is the great and first commandment.

And a second is like it; You shall love your neighbour as yourself. On these two commandments depend all the law and the prophets.’

Matthew 22:36

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Sharing Food – optional unit

<p>What this unit contains</p>	<p>This optional unit contains the following content from Christianity: How Christians follow the example of Jesus who shared food with His disciples at the last supper. Christians also often pray before a meal to thank God for their food.</p> <p><i>And content from the following two faiths:</i> Sikhism: The Langar and sharing. Concept of hard earned food. The story of Guru Nanak and Bhai Lalo. Hinduism: Offering food to deities to be blessed during puja. Prasad. Story of Krishna and Sudhama</p>																														
<p>Where the unit fits and how it builds upon previous learning</p>	<p>This is an <i>optional</i> unit for Key Stage 1. It makes links with the Natural World unit and Christianity units on Easter and symbols.</p>																														
<p>Extension activities and further thinking</p>	<ul style="list-style-type: none"> • Find out about foods shared during some festivals in other faiths and beliefs. • Find out about any special food rules followed by people in the school. • Find out about the sharing of the kola nut in African traditions. The symbolism of this is peace. 																														
<p>Vocabulary</p> <table border="0" data-bbox="118 1002 1099 1281"> <tr> <td>food</td> <td>Christianity</td> <td>Jewish</td> <td>reply</td> </tr> <tr> <td>special times</td> <td>Christian</td> <td>Passover</td> <td>guest</td> </tr> <tr> <td>invitations</td> <td>Hinduism</td> <td>Holy communion</td> <td>Jesus</td> </tr> <tr> <td>sharing</td> <td>Hindu</td> <td>Mass</td> <td>Krishna</td> </tr> <tr> <td>favourite</td> <td>Sikhism</td> <td>Lord’s Supper</td> <td>Sudhama</td> </tr> <tr> <td>please</td> <td>Sikh</td> <td>Eucharist</td> <td>Guru Nanak</td> </tr> <tr> <td>thank you</td> <td></td> <td>remembering</td> <td>Bhai Lalo</td> </tr> </table>	food	Christianity	Jewish	reply	special times	Christian	Passover	guest	invitations	Hinduism	Holy communion	Jesus	sharing	Hindu	Mass	Krishna	favourite	Sikhism	Lord’s Supper	Sudhama	please	Sikh	Eucharist	Guru Nanak	thank you		remembering	Bhai Lalo	<p>SMSC/Citizenship</p> <ul style="list-style-type: none"> • Equality • Sharing with others – in communities and with wider groups • Investigate how communities function • Friendship and what makes a good friend 		
food	Christianity	Jewish	reply																												
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please	Sikh	Eucharist	Guru Nanak																												
thank you		remembering	Bhai Lalo																												

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Sharing Food – optional unit

Session 1. Key Questions: What meals do we share with others? How is that sharing made special?

Learning objectives	A T 1	A T 2	Suggested teaching activities	Sensitivities, points to note, resources
<p>Pupils should:</p> <ul style="list-style-type: none"> consider special times in their lives when friends, family and others come together to share food; explore how there are special times in people's lives and in the year where particular foods are important; reflect on the feelings associated with sharing 	<p>✓</p> <p>✓</p> <p>✓</p> <p>✓</p> <p>✓</p>	<p>✓</p> <p>✓</p> <p>✓</p> <p>✓</p> <p>✓</p>	<p>Ask pupils what are their favourite foods? How often are they able to have these?</p> <p>As a whole class activity, list times when members of the class eat alone and when they eat with others. Focus on shared family mealtimes in the week – when they occur and how this is different from eating alone, e.g. sitting at table together, using best table manners.</p> <p>Look at pictures of people sharing food together. Can you identify any of them? Why is it obvious that these meals are not 'everyday'? What makes such times special and how do the people involved in meals like this feel? Encourage pupils to share how they have felt during special celebratory meals.</p> <p>List special times that are common to people, whether religious or not, when there are special meals – e.g. weddings, birthdays, retirements, and festivals. What foods are eaten? Who shares these celebrations? What else happens that makes it obvious this is a special time? (e.g. best clothes, invitations, catering for all dietary needs.) Some people say prayers at the start of a meal e.g. giving thanks for the food to be consumed. This may be called Grace. Are there any foods the class would like to eat more often but are only available at special times (e.g. Christmas pudding)?</p> <p>From discussions draw out experiences that are common to a number of occasions e.g. laying table with a 'best' cloth, using best cutlery or crockery, inviting special guests, good manners, a special cake. Pupils should each draw or describe a meal that has been special for them – why was this special?</p>	<p>Resources Pictures from magazines, photographs or illustrations of families and faith communities showing people sharing foods.</p> <p>BBC Active DVD 'Celebrations and Special Times' – Introduction</p>



Sharing Food – optional unit

Session 2. Key Question: What do Christians recall about Jesus' last supper with his followers?

Learning objectives	A T 1	A T 2	Suggested teaching activities	Sensitivities, points to note, resources
<p>Pupils should:</p> <ul style="list-style-type: none"> • know that Jesus had some special friends, helpers and followers; • know that Jesus shared food with his friends at the Last Supper; • consider the feelings of Jesus and his friends at the Last Supper. 	<p>✓</p> <p>✓</p> <p>✓</p> <p>✓</p>	<p>✓</p> <p>✓</p> <p>✓</p>	<p>Remind pupils of stories of Jesus that they already know – probably the Nativity will feature most. Explain that when Jesus grew up he travelled around, teaching people about God.</p> <p>People often get together with their friends and share meals. Jesus had a group of friends who travelled with him for several years. Although many people grew to love Him and learned a lot from Him, some people grew angry and afraid of Jesus and how popular he was. Jesus was Jewish and He travelled to Jerusalem to celebrate the Jewish festival Passover. He had a special meal with his friends before what happened at the first Easter. Christians call this 'The Last Supper' and remember this meal today.</p> <p>Watch BBC Whiteboard Active DVD – 'Worship & Sacred Places' Christianity – Part 1-2 (The Last Supper)</p> <p>Sequence the story of The Last Supper.</p> <p>Or pupils could</p> <ul style="list-style-type: none"> • act out the story of The Last Supper in role play. • make some freeze frames depicting different scenes from the above story. 	<p>Resources</p> <p>BBC Whiteboard Active DVD 'Worship & Sacred Places' Christianity – Holy Communion http://www.schoolsresourcesonline.com/products.aspx?CurrentPage=2&categoryId=52</p> <p>Teacher's note:</p> <p><i>Depending on prior learning about Easter, the Last Supper story may need contextualising.</i></p>



Sharing Food – optional unit

Session 3. Key Question: Why is it important for Christians to share bread and wine?

Learning objectives	A T 1	A T 2	Suggested teaching activities	Sensitivities, points to note, resources
<p>Pupils should:</p> <ul style="list-style-type: none"> know that the bread and wine used at communion services remembers the last meal Jesus shared; to understand how the communion service is important for Christians. 	<p>✓</p> <p>✓</p> <p>✓</p> <p>✓</p>	<p></p> <p>✓</p> <p>✓</p> <p>✓</p>	<p>Recap the story of The Last Supper, reminding children about how important this meal was for Jesus and his friends.</p> <p>Explain that, just like Jesus' first friends, Christians follow the example of Jesus and the instructions that Jesus gave them. Why do you think they do that?</p> <p>Show pupils the artefacts used in the communion service. Then show them the brief piece of film 'Communion' from the DVD, sections beginning and Part 2 (which are on the either side of The Last Supper story.) Discuss how Christians remember Jesus' special meal with His friends when they celebrate the Eucharist. This is sometimes called 'The Lord's Supper' in some churches, 'the Mass' in some or 'Holy Communion' in others.</p> <p>What shows that this is an important service for Christians in the film? Why is it important for Christians to continue to share bread and wine together? Fill in a short response sheet.</p>	<p>Resources</p> <p>Artefacts: Chalice Patén</p> <p>BBC Whiteboard Active DVD 'Worship and Sacred Places' section - Christianity – Holy Communion</p> <p>Short response sheet</p>



Sharing Food – optional unit

Session 4. Key Question: Why is sharing food important to Sikhs?

Learning objectives	A T 1	A T 2	Suggested teaching activities	Sensitivities, points to note, resources
<p>Pupils should:</p> <ul style="list-style-type: none"> • know that the Gurus taught that everyone is of equal importance; • know the story of Guru Nanak and Bhai Lalo; • in the Gurdwara people share food together to show this equality. 	<p>✓</p> <p>✓</p> <p>✓</p> <p>✓</p>	<p></p> <p></p> <p></p> <p>✓</p>	<p>Explain that this lesson will focus on the beliefs of another faith, Sikhism. Some important rules for Sikhs about food are:</p> <ul style="list-style-type: none"> • Food must be obtained by hard work • Sharing food with others is important • Know everyone is equal and should have enough food. <p>The word Guru means teacher. The first Sikh Guru, Guru Nanak, who lived in India about six hundred years ago, started Sikhism. Like Jesus he travelled around telling people how to follow God.</p> <p>Tell the story of Guru Nanak and Bhai Lalo.</p> <p>When you have read the story, hot seat with the teacher in role as Guru Nanak. Draw out with the class what the Guru wanted people to learn from the situation. Watch an excerpt of video / DVD showing people sharing food in a Gurdwara, explaining that the Langar in the special kitchen where food is prepared daily for anyone to come to eat.</p>	<p>Resources</p> <p>Story of Guru Nanak and the poor man Bhai Lalo</p> <p>Film of people eating in a Gurdwara</p> <p>https://www.truetube.co.uk/film/blood-and-milk</p>

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Sharing Food – optional unit

Session 5. Key Question: Why is offering food to God important to Hindus?

Learning objectives	A T 1	A T 2	Suggested teaching activities	Sensitivities, points to note, resources
<p>Pupils should:</p> <ul style="list-style-type: none"> • know that making an offering of food in Hindu worship is a way of receiving blessings from God; • consider why the small offering Sudhama made to his friend Krishna was rewarded so much. 	<p>✓</p> <p>✓</p> <p>✓</p> <p>✓</p>	<p>✓</p> <p>✓</p> <p>✓</p> <p>✓</p>	<p>Explain that in this lesson pupils will be finding out how Hindus offer food to God during their worship.</p> <p>Show pupils film or images of Hindu worship at a home shrine. Explain that offering food to God includes receiving blessed food back to share. This offering also takes place in the Hindu Temple. You could visit the local Hindu Kovil (temple) to see how this takes place and ask questions about it.</p> <p>Tell the story of Krishna and Sudhama, his friend, the Brahmin. Introduce the fact that Hindus believe Krishna was God come to earth.</p> <p>Hot seat with the children in Sudhama’s role. Draw out why Sudhama felt so embarrassed at the offering he made to Krishna and also why Krishna rewarded Sudhama so well.</p>	<p>Resources</p> <p>Film or images of food being offered during Hindu worship.</p> <p>Story of Krishna and Sudhama, his friend the Brahmin (available from a number of sources).</p>



Sharing Food – optional unit

Session 6. Key Question: How does sharing food together make us feel?

Learning objectives	A T 1	A T 2	Suggested teaching activities	Sensitivities, points to note, resources
<p>Pupils should:</p> <ul style="list-style-type: none"> • have the opportunity to prepare, share and eat food together; • consider how sharing together makes us feel. 	<p>✓</p> <p>✓</p> <p>✓</p>	<p>✓</p> <p>✓</p> <p>✓</p>	<p>Recap on what has been learnt in the unit about some of the importance of food in the faiths studied.</p> <p>Include views about sharing meals and how most faiths use food as part of sharing.</p> <p>Organise a class party or picnic, this could be based around preparing and sharing the food from a particular faith or culture. Point out to pupils that there is a need to conserve the world’s resources and food is a valuable resource. Choices as to which foods to offer to guests should provide an opportunity to talk about foods that members of the class are unable to eat for different reasons – e.g. health or faith rules. This experience is an opportunity for the whole class to share with each other and some guests. These guests could be parents, members of another class or school, people from the community or other members of the school community, e.g. Head teacher, Governors or the premises officer.</p> <p>Using the planning sheet, organise and experience a food sharing event.</p>	<p>Resources</p> <p>Planning sheet</p> <p>Party/picnic food.</p>



Sharing Food – optional unit

Short response sheet

We talked about why Christians share bread and wine together

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I think it is because

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Sharing Food – optional unit

The Story of Guru Nanak and Bhai Lalo

Guru Nanak was travelling around the country. In one town his custom was always to stay with a poor, but honest carpenter called Bhai Lalo. On one occasion while he was there, Guru Nanak was invited by a very rich local man to have a meal with him. Guru Nanak was important and the rich man could not understand why Nanak didn't want to eat rich food with rich people.

"Why don't you like my delicious cakes and prefer to eat your friend Lalo's dry bread?" he asked.

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"Why do you want to give me such an expensive meal?" asked Guru Nanak.

"For me it is nothing, a tiny part of my wealth, don't worry about it," said the rich man.

"The food my friend Lalo gives me is a big sacrifice for him but he does it because he is my friend. He works hard for it and he provides for me with love. You will never make such a sacrifice for me, that is why I prefer my friend Lalo's dry bread," Guru Nanak replied.

Guru Nanak continued to stay and eat with Bhai Lalo.

The rich man went away and thought about what Guru Nanak had said and became more understanding about the importance of honest work.



Sharing Food – optional unit

Sharing Food Planning Sheet

1. Food choices - following work done earlier in the unit or through sessions in health education on food preferences and intolerances, pupils should consider dietary requirements and faith rules that will affect the experience that they and their guests can share together, catering for everyone, then plan your menu and shopping list.
2. Design, make and send your invitations.
3. Plan the venue and wet weather contingency plans as necessary.
4. Purchase and prepare foods, table coverings, table decorations etc.
5. Write some thank you thoughts to say about the foods that will be shared and the company of the people with which the food is shared.
6. Share the occasion, considering the enjoyment of all.

Tidy up.

Weddings



<p>What this unit contains</p>	<p>This unit provides an opportunity to find out about weddings as part of a number of focuses on change and the cycle of life across Key Stages 1 and 2. As they work through the unit, in relation to the faiths studied, pupils will examine the following areas:</p> <ul style="list-style-type: none"> • Ways of celebrating (What do people do?) • The story (Who is it all about and the feelings the ceremony demonstrates) • The community (Which wider community's celebration is this?) • The symbols (Why do they do that?) • The inner meaning (What is it really about?) <p>Pupils should each study weddings in the Christian tradition and that of one other faith or belief from Hinduism, Humanism, Judaism or Sikhism, with all of these covered across the class. Teachers need to emphasise that there are many family experiences and many ways that people choose to live – this unit will focus on the choice of marrying a partner and setting up a home together with a ceremony that marks the promises made to each other. Teachers need to be sensitive to the experience of pupils whose parents' marriages have not lasted or who have different family patterns.</p>																																								
<p>Where the unit fits and how it builds upon previous learning</p>	<p>This unit provides an opportunity of focusing in depth on one Rite of Passage, Weddings, as part of a focus on change and the cycle of life.</p>																																								
<p>Extension activities and further thinking</p>	<ul style="list-style-type: none"> • In session four research a wedding celebration from a faith or belief other than Christianity and the other faiths being covered by the class. • Many weddings are very expensive – discuss whether the expense really matters 																																								
<p>Vocabulary</p> <table border="0"> <tr> <td>wedding</td> <td>page boy</td> <td>Sikh</td> <td>Rabbi</td> </tr> <tr> <td>Christian</td> <td>best man</td> <td>Judaism</td> <td>Tallit</td> </tr> <tr> <td>Christianity</td> <td>father of the bride</td> <td>Jewish</td> <td>Henna</td> </tr> <tr> <td>bride groom</td> <td>celebrant</td> <td>choir</td> <td>Sindur</td> </tr> <tr> <td>wedding rings</td> <td>Hinduism</td> <td>Cantor</td> <td>Puja</td> </tr> <tr> <td>usher</td> <td>Hindu</td> <td>(c)huppah</td> <td>Ganesh</td> </tr> <tr> <td>priest</td> <td>promises</td> <td>Ketubah</td> <td>mangal sutra</td> </tr> <tr> <td>vicar</td> <td>vows</td> <td>Mazel tov</td> <td>garlands</td> </tr> <tr> <td>Bridesmaid</td> <td>Sikhism</td> <td>Mitzvah</td> <td>shanghai musi</td> </tr> <tr> <td>Humanism</td> <td></td> <td></td> <td></td> </tr> </table>	wedding	page boy	Sikh	Rabbi	Christian	best man	Judaism	Tallit	Christianity	father of the bride	Jewish	Henna	bride groom	celebrant	choir	Sindur	wedding rings	Hinduism	Cantor	Puja	usher	Hindu	(c)huppah	Ganesh	priest	promises	Ketubah	mangal sutra	vicar	vows	Mazel tov	garlands	Bridesmaid	Sikhism	Mitzvah	shanghai musi	Humanism				<p>SMSC/Citizenship</p> <ul style="list-style-type: none"> • Public commitment to a partnership • The Journey of life • Promises and vows
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Weddings

Session 1. Key Question: What special times have we shared with others?

Learning objectives	A T 1	A T 2	Suggested teaching activities	Sensitivities, points to note, resources
<p>Pupils should:</p> <ul style="list-style-type: none"> know that there are times in life when people share common human experiences; reflect on special times they have shared. 	<p>✓</p> <p>✓</p>	<p>✓</p> <p>✓</p> <p>✓</p> <p>✓</p> <p>✓</p>	<p>Make a simple timeline and help pupils to share and list life experiences, both secular and religious, e.g. it's my birthday, when mum had a new baby, when we went to a wedding.</p> <p>What is a celebration? Watch the 'Introduction to the idea of family celebrations' in the BBC Active DVD. Extend pupils' understanding of a celebration, using examples from the class to illustrate.</p> <p>As a class, talk about and make a class list of celebrations pupils have taken part in.</p> <p>Explore the experiences in a number of ways e.g. Who is the celebration all about? What did the people do? Why did they do it? Who also shares the celebration? What was it really about?</p> <p>On a short response sheet, pupils should draw and write about one of their special experiences, these can contribute towards a class display of happy times.</p>	<p>Resources Wedding pictures from any website. Personal/children's parents wedding pictures (if appropriate)</p> <p>BBC Active DVD 'Rites of Passage' and 'Celebrations and Special Times'; 'What do people do when they celebrate special times?' Short Response sheet</p> <p>Notes for Teachers: <i>Teachers need to be aware of and sensitive to the different family structures of children within their class and ensure that their approach and the children's understanding are inclusive.</i></p>

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Weddings



Session 2. Key Question: What is a wedding?

Learning objectives	A T 1	A T 2	Suggested teaching activities	Sensitivities, points to note, resources
<p>Pupils should:</p> <ul style="list-style-type: none"> • know that growing up sometimes involves deciding to marry someone; • know that the celebration is called a wedding; • understand that a wedding is sometimes celebrated in a faith community; • understand that a wedding is a way for a family to celebrate a change in the lives of two people. 	<p>✓</p> <p>✓</p> <p>✓</p> <p>✓</p> <p>✓</p>	<p>✓</p> <p>✓</p> <p>✓</p> <p>✓</p> <p>✓</p>	<p>Recap with the children the special times explored in the last session and share some of their work. Talk about the journey of life and introduce the idea that a wedding is also a special time of celebration.</p> <p>What is a wedding? Ask the class if they have been to any weddings. Make a list of what they think happens during a wedding. Explain that sometimes people get married in a civil service and sometimes in a place of worship, if possible link to examples of weddings attended by members of the class.</p> <p>Look at various pictures of a Christian wedding or watch one of the Christian wedding services taking place in the BBC Active DVD, freezing the film as necessary. Discuss with children what is happening in these pictures and how people are feeling during the service.</p> <p>What are the key ways in which people celebrate weddings? Do they have special clothes or eat special food? Do they give gifts or send cards?</p> <p>Make a class record organising information about a wedding using the headings introduced in the previous lesson: Who is it all about? (i.e. the couple getting married) What did the people do? Why did they do it? Whose celebration was it? What was it really about? (i.e. telling everyone that you are changing your life as individuals and becoming a family)</p>	<p>Resources Photos of traditional Christian weddings. BBC Whiteboard Active DVD 'Rites of Passage' Unit 4 'A world of weddings'.</p> <p>Notes for Teachers: <i>Pupils need to understand that weddings do take place outside of places of worship. Also that not every partnership goes on to include a wedding and that some families do not feel they want to be married.</i></p>

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Weddings

Session 5a. Key Question: What happens in a Jewish wedding?

Learning objectives	A T 1	A T 2	Suggested teaching activities	Sensitivities, points to note, resources
Pupils should: <ul style="list-style-type: none"> • know what happens during a Jewish wedding; • understand that the celebration is shared with family, friends and the faith community; • know some of the symbols in a Jewish wedding; • understand the inner meaning of a Jewish wedding. 	<p>✓</p> <p>✓</p> <p>✓</p> <p>✓</p> <p>✓</p> <p>✓</p> <p>✓</p>	<p>✓</p> <p>✓</p> <p>✓</p> <p>✓</p> <p>✓</p> <p>✓</p>	<p>Examine pictures/ video/ DVD of a Jewish wedding. What do people do? Focus on preparations, the ceremony and the sequel.</p> <p>Discuss - who is it about? Consider the role of the bride, groom, and the groom's two male witnesses, parents of the bride, the groom's family, bridesmaid/attendants, cantor and Rabbi.</p> <p>Where is it conducted, and why? Who is there to share? i.e. the community, family and friends. Jews believe that marriages are made in heaven so when a couple is married they are often referred to as a 'heaven blessed' couple</p> <p>Talk about the symbols in a Jewish wedding, e.g. clothes and accessories, wedding rings and stamping on the wine glass.</p> <p>Focus pupils on what it is really all about; bring out the idea that the two separate people are becoming one.</p> <p>Prepare group to talk to the class during the next lesson about how a Jewish wedding is similar or different to other weddings.</p> <p>Children could design an invitation to a Jewish wedding using Jewish symbols.</p>	<p>Resources BBC Active DVD 'Rites of Passage' Unit 4</p> <p>www.yeshautyisrael.com/wedding</p>

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Weddings

Session 5b. Key Question: What happens in a Hindu wedding?

Learning objectives	A T 1	A T 2	Suggested teaching activities	Sensitivities, points to note, resources
Pupils should: <ul style="list-style-type: none"> know what happens during a Hindu wedding; understand that the celebration is shared with family, friends and the faith community; know some of the symbols in a Hindu wedding; understand the inner meaning of a Hindu wedding. 		✓	Show pictures/video of a Hindu wedding, ask children what can they see in the pictures? Talk about whose celebration it is i.e. the community, family and friends. <ul style="list-style-type: none"> Can you tell who the bride and groom are? How can you tell? What do you notice about the clothes the people wear? Where is it conducted and why? Does a wedding have to happen in a temple or can it be conducted anywhere? 	Resources www.ngfl.ac.uk www.bbc.co.uk/religions BBC Whiteboard Active DVD 'Rites of Passage' Unit 4 Wedding music Hindu wedding video Teachers notes: Hindu weddings
	✓	✓	Explain that Hindus believe that fire is God, so they take their vows by circling the fire and make it their witness. Discuss what the ceremony is really all about; drawing out the idea that the two separate people are becoming one.	
	✓		Using videos, websites and books find out: <ul style="list-style-type: none"> How many days do the ceremonies last for? What other rituals happen before the wedding day? Why are the colours worn by the bride so different from those worn by Christian brides? Explanations for symbols in the wedding, e.g. clothes and accessories, henna for the bride, garlands, coconut, mangal Sutra (necklace that symbolises that a woman is married). 	
	✓		Prepare group to talk to the class during the next lesson about how a Hindu wedding is similar or different from other weddings.	
	✓		Children could: <ul style="list-style-type: none"> design invitation cards using the wedding symbols make henna patterns 	

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Weddings

Session 5d. Key Question: What happens in a Humanist wedding?

Learning objectives	A T 1	A T 2	Suggested teaching activities	Sensitivities, points to note, resources
<p>Pupils should:</p> <ul style="list-style-type: none"> • know what happens during a humanist wedding; • understand that the celebration is shared with family and friends; • explain why the love and support of other human beings is important in everyone's lives; and • understand how humanists can make their wedding personal and meaningful. 	<p>✓</p>	<p>✓</p>	<p>Show pictures/video of a humanist wedding, ask children what can they see in the pictures? Talk about whose celebration it is i.e. the couple, family and friends.</p> <ul style="list-style-type: none"> • Can you tell who the wedding couple are? How can you tell? • Where is it conducted, and why? (The couple are free to choose) • What feelings do you think people have? <p>Explain that humanist celebrants work with the couple to create a ceremony that reflects who they really are and make it personal and meaningful to them. They will conduct weddings and civil partnerships for both mixed-sex and same-sex couples. Explain that at a humanist wedding, the couple are free to choose what they want to say to each other (their promises)</p> <ul style="list-style-type: none"> • Read examples of promises made at humanist weddings • What promises do you think it is important to make? • How might a couple make a wedding meaningful to them? <p>Explain that as there are no special rules, traditions, or symbols at humanist weddings, but some couples choose their own symbols. Show some symbols from humanist weddings (e.g. handfasting, candles, mixing sand) and ask what they might represent</p> <p>Prepare group to talk to the class about how a humanist wedding is similar or different from other weddings (e.g. Christian)</p> <p>Children could:</p> <ul style="list-style-type: none"> • Plan a humanist wedding ceremony (guests, symbols, music, readings) • Write questions a celebrant might ask a couple to ensure their ceremony is meaningful to them 	<p>Sensitivities, points to note, resources</p> <p>Resources understandinghumanism.org.uk/uht-heme/celebrations-and-ceremonies Includes: lesson plan, presentation, activities, example promises, photos, video, and humanist perspective on celebrations and ceremonies BHA Ceremonies website: humanistceremonies.org.uk - Leaflets about weddings are available to download Stephen Fry video on humanist ceremonies: https://www.youtube.com/watch?v=wzTXicmkrQ4</p> <p>Notes for teachers A humanist wedding is not a marriage. The couple also have to undergo a legal marriage at a register office. Humanists believe their weddings should be legally recognised marriages just like many religious weddings are. Many humanists do not think marriage is an essential ingredient of a loving relationship. Not being married does not necessarily mean being any less committed to your partner.</p>

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Weddings

Response sheet

A special time in my life that I shared with others was



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Four sets of horizontal dashed lines for writing a response.



Notes for Teachers Hindu Weddings

A **Hindu wedding** ceremony is the second of the four **Ashrams**. Each Ashram has specific **duties or dharma** that a person must follow. **The Grihastha** Ashram is known as household life and for taking an active role in the care and protection of ones family and responsibility to society. Wedding ceremonies in the UK are traditionally conducted in the ancient language, Sanskrit and brief translations can be given by the priest.

The pre-wedding ceremonies include **an engagement**, (involving **Vagdhana, an oral agreement**). **A Lagna Patra, a written declaration**, and arrival of the marriage party at the bride's residence, often in the form of a marriage procession. The post-marriage ceremonies involve welcoming the bride to her new home.

An important thing to note is that despite the fact that the modern Hinduism is based on the **Puja**, the worship of *devas* as enshrined in the **Puranas**. A Hindu marriage ceremony is essentially a Vedic yajña (a fire-sacrifice). The primary witness of a Hindu marriage is the fire-deity (or the Sacred Fire) **Agni dev**, and by law and by tradition, no Hindu marriage is deemed complete unless in the presence of the Sacred Fire, seven encirclements have been made around it by the bride and the groom together.

IMPORTANT MARRIAGE CEREMONIES: Hindu marriage ceremonies vary in different regions and according to family traditions. The major ceremonies are the following.

- **Ganesh Puja** - Invoking Lord Ganesh to remove obstacles.
- **Agni Puja** - Evoking the holy fire as a witness and seeking his blessings.
- **Kanyádána** - Giving away the bride to the groom. Of many auspicious charities.

Giving your daughter in marriage is considered one of the most auspicious. As a condition for offering his daughter for marriage, the father of the bride requests a promise from the groom for assisting the bride in realizing their spiritual and material duties. The groom makes the promises by repeating them three times.

- **Mangalsutra** – Tying of holy necklace on bride.
- **Saptapadi/Saat Phere** – The Seven Holy Steps circling the fire.
- **iláróhana** – Bride steps on the stone.

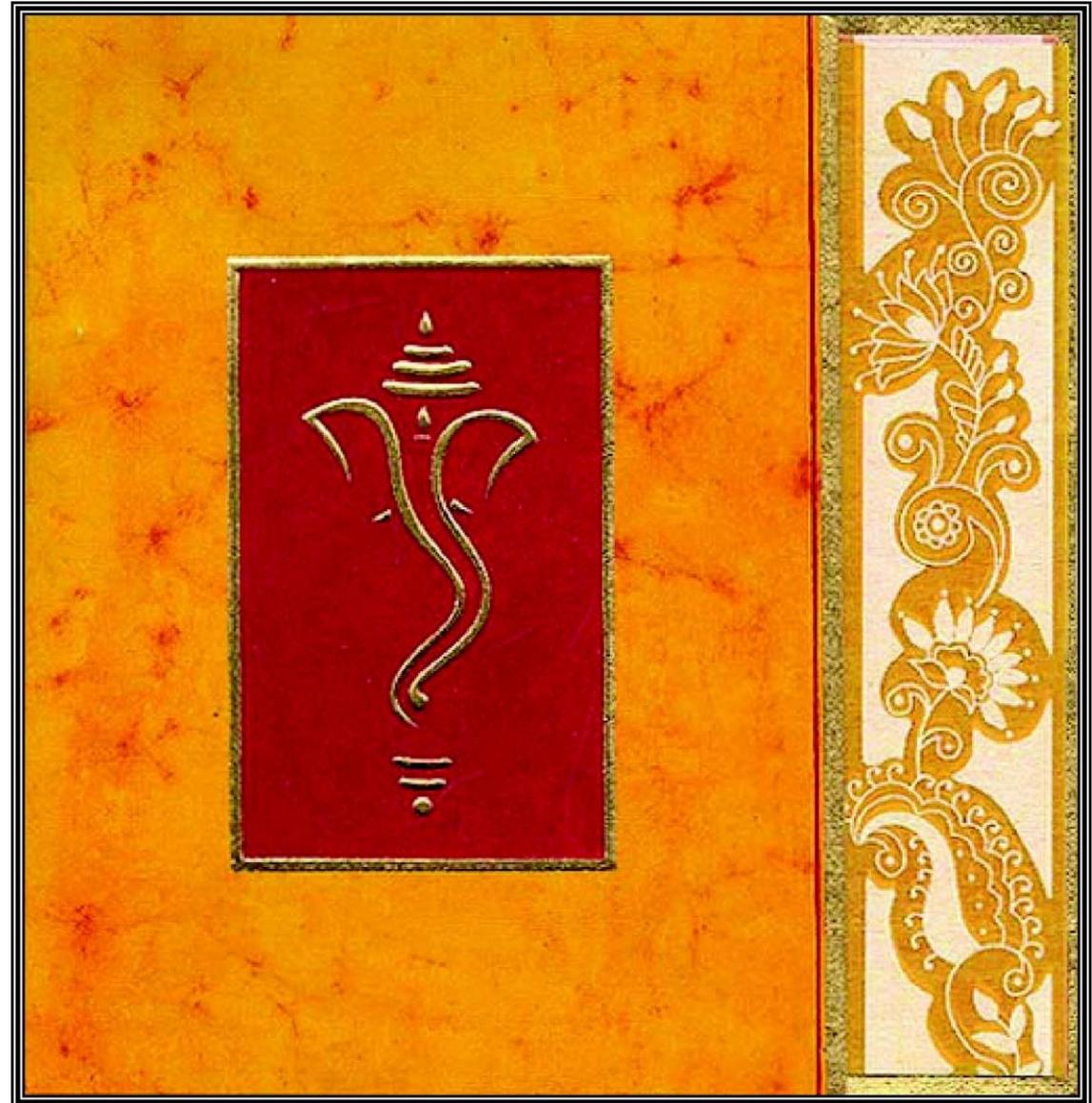
The ceremonies involve the Pandit (priest) chanting various prayers and mantras. **Saat phere** is an important part of the wedding ceremony, undertaken by the bride and the groom around a sacred fire. **Saat** means seven and **Phere** means circumambulation. The vows taken in front of Agnidev, the fire God, who acts both as a witness and one who offers his blessings. The vows or promises are considered sacred and unbreakable. *The bride and groom* circumambulate the fire seven times reciting the following prayers:

1. With the first step, the couple asks God for plenty of pure and nourishing food. They promise to share this with the less fortunate.
2. With the second step, the couples pray to give them the mental, physical and spiritual strength to lead a healthy life. They promise to share their joys and sorrows.
3. The third step is for preserving wealth, prosperity and virtuous, noble and heroic children. They promise to live with honour and respect.
4. With the fourth step, they pray for attainment of happiness and harmony by mutual love and trust between themselves and within the family including, respect for elders.
5. With the fifth step, they pray for the welfare of all living beings in the Universe. They promise to protect and give in charity to the vulnerable in society, including children and the elderly.
6. With the sixth step, to give them a long, joyous life and togetherness forever.
7. With the seventh, and last, step, for understanding, companionship. They promise each other loyalty and unity with love and sacrifice.

Weddings



Cover of a typical Hindu Wedding invitation





Weddings

Hindu Glossary

Ashrams: Four stages of life and development:

1. Bramachari Ashram or Student Life – Learning, values and qualities.
2. Grihasta Ashram: Married Life/Householder – Married Life. Responsibility to family and Society. To give charity and help the poor and vulnerable.
3. Vanaprastha Ashram: Retired Life – Devotee more time to spiritual matters.
4. Sannyasa Ashram: Renounced Life- Devotee more time to spiritual matters.

Dharma: Religious and social responsibilities and duties.

Grihasta: Married life and responsibility to family and society.

Vagdhana: An oral agreement of marriage.

ᵀLagna Patra: A written declaration of marriage.

Puranas: Hindu holy scriptures.

Puja: Ceremony.

Agni Dev: Fire God.

Ganesh Puja – Ceremony Invoking Lord Ganesh to remove obstacles.

Agni Puja – Ceremony evoking the holy fire as a witness and seek his blessings.

Kanyádána – (Kanya – unmarried woman, dana,-charity). Considered one of the highest acts of charity. A father gives his daughter's hand in marriage to the groom.

Mangalsutra - Tying the holy necklace on the bride.

Saptapadi – Taking seven steps or vows.

Saat Phere (Saat- seven, Phere- circumbulating) – The Seven Holy Steps circling the fire.

śilárohana – Bride steps on the stone.

Key Stage 2 Units

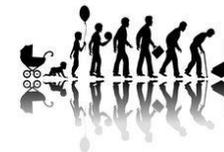
Journey of Life and Death

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Peace

Understanding Faith and Belief in Lewisham

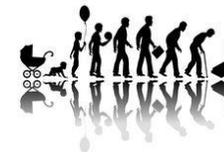




Journey of Life and Death

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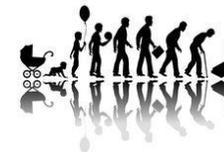
<p>What this unit contains</p>	<p>During this unit pupils investigate beliefs about life and life after death. The unit encourages them to reflect on and express their hopes for their future. Pupils will have the opportunity to share feelings of loss caused by separation, and consider how faith and belief can provide some answers to life’s most challenging and ultimate questions, and also challenges attitudes, values and commitments in life. They will consider how important it is to celebrate the lives of those they have lost and how remembering can help the healing process. They will examine their attitudes, values and commitments in the light of this learning.</p> <p>Key Concepts: AT1: Beliefs and Teachings; Practices; Forms of Expression. AT2: Belonging; Meaning and purpose.</p>																																										
<p>Where the unit fits and how it builds upon previous learning</p>	<p>This unit should be taught in Year 6. It focuses on elements from the local Agreed Syllabus on ultimate questions. Some lessons have suggested cross-curricular links with ICT, art and design, and design and technology.</p> <p>CAUTION: Some lessons could be upsetting to a pupil who has recently suffered bereavement. Care needs to be taken to check whether any pupils are in this situation and to deal with this sensitively in communication with parents/ carers.</p>																																										
<p>Extension activities and further thinking</p>	<ul style="list-style-type: none"> • Explore personal feelings about grief through: Michael Rosen’s Sad Book by Michael Rosen (Author), Quentin Blake (Illustrator), Walker Books • Find out about the work of a local hospice in caring for the families of those who are life limited. Contact St Christopher’s Hospice. 51-59 Lawrie Park Road, Sydenham, London SE26 6DZ Tel: 020 8768 4500 • Visit a war memorial or graveyard 																																										
<p>Vocabulary</p> <table border="0"> <tr> <td>Christian</td> <td>Buddhism</td> <td>God</td> <td>Eulogy</td> </tr> <tr> <td>Christianity</td> <td>Buddhist</td> <td>Hope</td> <td>Grave</td> </tr> <tr> <td>Loss</td> <td>community</td> <td>Memorial</td> <td>Gravestone</td> </tr> <tr> <td>Sadness</td> <td>Sikhism</td> <td>Healing</td> <td>Priest</td> </tr> <tr> <td>Remembering</td> <td>Sikh</td> <td>Bereaved</td> <td>Spirit</td> </tr> <tr> <td>Religious</td> <td>Reincarnation</td> <td>Burial</td> <td>Soul</td> </tr> <tr> <td>Islam</td> <td>Heaven</td> <td>Coffin</td> <td>Judaism</td> </tr> <tr> <td>Hindus</td> <td>Grief</td> <td>Humanist</td> <td>Jewish person</td> </tr> <tr> <td>Muslim</td> <td>Karma</td> <td>commemorate</td> <td>Baha’i</td> </tr> <tr> <td>Hinduism</td> <td>Bereavement</td> <td>Cremation</td> <td></td> </tr> </table>	Christian	Buddhism	God	Eulogy	Christianity	Buddhist	Hope	Grave	Loss	community	Memorial	Gravestone	Sadness	Sikhism	Healing	Priest	Remembering	Sikh	Bereaved	Spirit	Religious	Reincarnation	Burial	Soul	Islam	Heaven	Coffin	Judaism	Hindus	Grief	Humanist	Jewish person	Muslim	Karma	commemorate	Baha’i	Hinduism	Bereavement	Cremation		<p>SMSC/Citizenship</p> <ul style="list-style-type: none"> • Personal hopes for the future • Beliefs about death • Ultimate questions about meaning and purpose in religion. • Remembering the lives of others. 		
Christian	Buddhism	God	Eulogy																																								
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Hindus	Grief	Humanist	Jewish person																																								
Muslim	Karma	commemorate	Baha’i																																								
Hinduism	Bereavement	Cremation																																									



Journey of Life and Death

Session 1. Key Question: How is life like a journey?

Learning objectives	A T 1	A T 2	Suggested teaching activities	Sensitivities, points to note, resources
<p>Pupils should:</p> <ul style="list-style-type: none"> realise there are significant milestones of the journey of life; think about what they would like to happen for themselves and the world in the future; understand the importance of hope to human beings. 			<ul style="list-style-type: none"> Make a class map of a journey of life identifying significant milestones along the way for an imaginary person. This could be drawn as a road with smooth and rocky sections, crossroads, a river etc. Encourage pupils to share thoughts about key moments in their lives so far, e.g. taking their first steps, starting school, learning to read, moving from KS1 to KS2, etc. The teachers could share with pupils some of the significant milestones in his/her life, e.g. leaving school, first job ... then a personal reflection on what the teacher still hopes to see or do in his/her lifetime. Invite pupils to share their hopes - it may be appropriate to make a list of these and for pupils to know that life can sometimes be difficult. Talk about how, during tough times, people hope for better times in the future. Decide on how one might show easy and hard times in life, on the diagram. Pupils draw their own timelines, based on the idea of the one that has been modelled. The timelines should branch off showing their probable and ideal future. Plenary: During this session the pupils can share their timelines with other members of the class. Encourage pupils to share what helps them to look forward to better times during times of difficulty. 	<p>Resources</p> <p>Template of timeline for modelling to the pupils</p> <p>RE Today: Exploring the Journey of Life and Death</p> <p>The Circle of Life – the Lion King e.g. https://www.youtube.com/watch?v=Gi biNy4d4gc</p> <p>Notes for teachers:</p> <p>This activity may lead to discussion about the end of the journey of a person's life and may also lead to pupils sharing experiences of the ends of lives</p> <p>of members of their families. These need to be dealt with very sensitively and a class code of conduct where disclosures are treated with respect would benefit the atmosphere for starting this unit.</p>

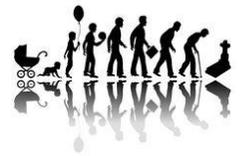


Journey of Life and Death

Session 2. Key Question: How do we feel when people leave us?

Learning objectives	A T 1	A T 2	Suggested teaching activities	Sensitivities, points to note, resources
<p>Pupils should:</p> <ul style="list-style-type: none"> consider human responses to loss and bereavement; reflect on their own response to human experience of life and death. 		<p>☐</p> <p>☐</p> <p>☐</p> <p>☐</p> <p>☐</p>	<p>Start the lesson by reminding pupils how they shared and discussed their timelines in session 1. Talk about the incidents in them and why they are different e.g. starting school, illness, friends moving, so that pupils consider the different experiences everyone of them has had and also that everyone has had some difficult times to cope with.</p> <p>Read the storybook 'Children Also Grieve' with the pupils.</p> <p>Talk about how the characters cope with their loss and grief and how they begin to feel less sad.</p> <p>In groups think about questions you might like to ask the dog characters. Then pupils could, using the puppets, 'hot seat' the characters asking their questions.</p> <p>Plenary: Discuss how people feel when people close to them die. How might the book help the audience that it is intended for?</p>	<p>Resources 'Children Also Grieve' – Talking about death and healing' by Linda Goldman (Jessica Kingsley) Dog puppets or toys can be the dogs in the story</p> <p>SEAL Pack - Primary National Curriculum (for those still using this) Relationships Years 1 and 2 Pages 15, 29, 30 and 33 Relationships Years 3 and 4 Page 20 Relationships Years 5 and 6 Pages 22 and 23 Photographs of feelings and emotions (SEN Pack)</p> <p>Notes for Teachers: These sessions may all involve pupils sharing experiences of the deaths of members of their families, friends or pets. These need to be dealt with very sensitively and it will help to recall the class code of conduct.</p>

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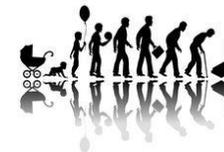


Journey of Life and Death

Session 3. Key Questions: What do Christians believe happens after we die? How does the Christian community respond to bereavement?

Learning objectives	A T 1	A T 2	Suggested teaching activities	Sensitivities, points to note, resources
<p>Pupils should:</p> <ul style="list-style-type: none"> learn about ways in which human experiences associated with death, loss and bereavement are understood in Christianity; understand the term bereavement; be aware that people cope with bereavement in different ways; understand how the Christian community supports the person who is bereaved. 	<p>□</p> <p>□</p> <p>□</p> <p>□</p> <p>□</p> <p>□</p> <p>□</p>	<p>□</p> <p>□</p> <p>□</p> <p>□</p> <p>□</p> <p>□</p> <p>□</p>	<p>Recap work from last lesson.</p> <p>Explore some of the different Christian viewpoints about death and the afterlife. Explain to pupils that the vast majority of Christians believe in some kind of Heaven, in which believers enjoy the presence of God and other believers and freedom from suffering. Views differ as to whether those of other faiths or none at all will be in Heaven, and concepts of what Heaven will be like differ as well.</p> <p>Watch the short video extract on ‘Waterbugs and Dragonflies’ or read the book to the pupils and discuss the symbolism with them.</p> <p>Refer to the words of The Bible taken from 1 Corinthians 2:9: <i>“No eye has seen, no ear has heard, no mind has conceived what God has prepared for those who love him.”</i></p> <p>Compare this to the dragonfly which is unable to return to tell the other waterbugs what he has discovered about life after the pond.</p> <p>Introduce the term “bereavement” and talk about how different people cope with loss in different ways.</p> <p>Think about how being part of the Christian community can help Christians who are bereaved in a variety of ways.</p> <p>Record pupils’ views on Heaven – artistically on posters or in poetry/prose. <i>During the plenary the pupils can show their posters or read their responses to the class.</i></p>	<p>Resources Good News Bibles for pairs or small groups</p> <p>‘Pathways of Belief’ Video/DVD: Christianity – Easter ‘Waterbugs and Dragonflies’ or the book on which this is based:</p> <p>‘Waterbugs and Dragonflies: Explaining Death to Young Children’ by Doris Stickney</p> <p>www.jtsma.org.uk/inspirations_waterbugs.html</p> <p>www.belovedhearts.com/stories/Doris-WaterbugsandDragonflies-632617144169637500.aspx</p>

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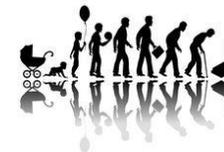


Journey of Life and Death

Sessions 4 and 5. Key Questions: What do other faiths or beliefs believe happens after we die? How do they respond to bereavement?

Learning objectives	A T 1	A T 2	Suggested teaching activities	Sensitivities, points to note, resources
<p>Pupils should:</p> <ul style="list-style-type: none"> understand the term bereavement; learn about the ways in which human experiences associated with death, loss, hope, and meaning in life are understood in Islam, Buddhism, Judaism, Hinduism and Sikhism; be aware that people cope with bereavement in different ways; understand how each community supports the person who is bereaved. 	<p>☐</p> <p>☐</p> <p>☐</p> <p>☐</p> <p>☐</p>	<p>☐</p> <p>☐</p> <p>☐</p> <p>☐</p>	<p>Recap the areas covered in the unit so far. Explain that different religions have different answers to the question ‘What happens when someone dies?’</p> <p>Remember the term ‘bereavement’ and talk about how people cope with loss in different ways. <i>(You may be able to refer to topical local, national or international events or scenarios in familiar television programmes to distance from pupils’ experiences.)</i></p> <p>Explain that religious communities have certain beliefs about what happens after we die. Religious communities and individuals help people who are bereaved in different ways. In these 2 sessions the pupils are going to find out some of these. Divide the class into groups, each group will be finding out about one faith or belief and becoming the class experts on what that religion believes about death and what it does to mark the death of someone and to support their family. The group can use fact sheets, books, ICT and audio-visual resources etc. At the end of this double session, each group will feedback to the class on its findings.</p> <p>Feedback session: Pupil groups report back their findings. Draw out from them how being part of a ‘faith community’ might help people who are bereaved in a range of ways. Talk about the support given by friends to all those who have suffered a loss, whether they belong to a community or not.</p> <p>Plenary: Using a circle and a straight line explore the two ideas of reincarnation / rebirth and one earthly life. Sensitively compare and contrast the different beliefs about life after death. Play some peaceful music and ask pupils to think about the different helpful activities. If possible, record a personal response.</p>	<p>Resources</p> <p>Hodder/Wayland series – Life’s End</p> <p>Various websites</p> <p>Espresso Faiths - Buddhism (Worksheet on Pets)</p> <p>Research Sheet</p> <p>RE Today</p> <p>Clearvision Buddhism for Key Stage 2’ Video/DVD – ‘The story of Kisa and the Mustard Seed’</p> <p>Fact sheets for pupils on beliefs about death and bereavement in each faith.</p> <p>Music</p>

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Journey of Life and Death

Session 6. Key Question: How do we remember people who have died?

Learning objectives	A T 1	A T 2	Suggested teaching activities	Sensitivities, points to note, resources
<p>Pupils should:</p> <ul style="list-style-type: none"> know some ways in which human experiences associated with death, loss, hope, and meaning in life are expressed; reflect on their responses to human experience of death; understand how important it is to celebrate a life and how remembering them can help their friends to become less sad. 		<ul style="list-style-type: none"> □ □ □ □ □ □ □ 	<p>Recap the work done in previous lessons and in particular feelings about parting and loss. Watch the video or read the book 'The Fall of Freddie the Leaf' with pupils. Give pupils a leaf shaped piece of paper and encourage them to write their feelings about the story on the leaf. These could be displayed in the classroom.</p> <p>Read 'Badger's Parting Gifts'. Then give out text extract.</p> <p>Highlight all the words that describe feelings. Discuss the parting gifts. Can pupils suggest any 'gifts' that people have given them? Write a short account as one of the animals, of an experience with Badger that they might recall to tell the others, and that includes positive feelings that will help them to remember him with less sadness. Play peaceful music while pupils share their writing with each other.</p> <p>Talk about how important it is to celebrate the lives of people who have died and how remembering can help people to heal.</p> <p>Plenary: During the session, either have a candle lighting ceremony in which each child lights a candle to remember somebody special. or Encourage the pupils to write down some sort of wish. During the plenary session the pupils may consider various parting gifts that have been left to them by those who have died.</p>	<p>Resources Badger's Parting Gifts by Susan Varley (ISBN 0-00-664317-5) The Fall of Freddie the Leaf: A Story of Life for All Ages by Leo F. Buscaglia Publisher: Slack; (Aug 2002) ISBN-10: 0-80507-195-4</p> <p>Notes for Teachers: During this session pupils may share personal experiences of loss. These need to be dealt with very sensitively within the class code of conduct.</p>

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Death and Bereavement in Christianity

For Christians **Good Friday** is when they remember the death of Jesus on the Cross (his **Crucifixion**) and **Easter Day** is when they remember Jesus rising, (his 'astonishing' **Resurrection**). Christians believe that when Jesus had risen, it was a promise for a life after death, John 3:16, known as **eternal life** for those who believe in him.

Christians believe that although death is very sad, living a Christian life ensures that when they die, Christians will continue the next stage of their journey, sharing the promise of an eternal life with God in Heaven and with those Christians who have passed on before.

In many Christian traditions the priest or **minister** prays with a person who is dying and **anoints** them with **Holy Oil** to help them on their journey to **eternal** life.

Bereavement

ages
9-11
13-1

Some Christians wear black after someone dies as an outward sign to sympathise and empathise with the sadness of the occasion. The period of wearing black may differ between culture and culture or denomination to denomination within the Christian faith.

Christians remember the life of the person who they have lost. Although Christians believe that their loved one has gone onto a better and everlasting life, they will still miss them and usually feel very sad.

Christians comfort each other at this time through strong community fellowship; visiting each other and talking to each other about their sense of loss. This experience can differ from church to church.

A special service is held for the burial or cremation usually within two weeks of the death. In addition, a memorial service may be held as an opportunity for many people to remember and thank God for a person's life. This may be held on the same day or several months later.

Before the service the Christian minister visits the bereaved family and helps them talk about their loved one and helps them choose readings and prayers for the service.

The funeral service is usually held within the church, chapel or crematorium. The Christian family are invited to celebrate the life of the person who has died and say 'Goodbye'.



People often show their respect by sending flowers to adorn the coffin and grave, or they may donate money to a charity in the person's memory.

The leader of the Christian family, priest, minister or bishop, leads the funeral service. Through prayer, reading, songs and a shared eulogy, Christians are supported to say goodbye to someone who has been part of their family. Christians can only be buried in consecrated ground. Christians may also be cremated and their ashes are either buried or scattered somewhere special to the person who has died and the family.

While earth is sprinkled over the grave, by a faith leader and sometimes by family members, or ashes are scattered, the faith leader will say "Earth to Earth. Ashes to Ashes. Dust to Dust."

This reminds Christians that a person's body returns to dust, but the spirit or soul lives on with God. The period of time spent at a graveside can differ between culture and culture and denomination to denomination, e.g. most Pentecostal churches do not leave until their Christian family have buried the Christian family member. While this is being carried out, the congregation continue to sing and comfort each other until the coffin is completely buried.

After a funeral service it is customary for the bereaved family and friends to continue to share time, food and drink in order to comfort each other. Again, the length of this time together can vary between denomination to denomination, from a few hours on the day of the funeral to nine nights.

Families may mark the site of the grave with a gravestone highlighting the life of the person who has died. As part of this an appropriate quote from the Bible with an epitaph about the person may be placed on the gravestone. Some people remember a person in another way such as by placing a plaque on a memorable site or by planting a tree to commemorate the person's life.

The Christian minister will call or visit and offer to keep in contact and provide support for the family after the funeral.

People who are grieving often need to talk about their loved one and the personal loss they feel. Sometimes they need to be told they are allowed to be sad. They may feel lonely, guilty, fearful and even angry. The Christian Church offers friendship, practical support and prayers.

All Christians will share beliefs and rituals, but within the Christian faith there is also room for people to express their grief in different ways and to deal with their bereavement personally, but knowing that they have the support of their Christian community.



Helpful Bible Quotations

“Jesus said: ‘For God loved the world so much that He gave his only Son, so that everyone who believes in him may not die but have eternal life.’” – John 3:16 (*Taken from The Good News Bible.*)

“Jesus said: ‘Do not let your hearts be troubled. Trust in God, trust also in me. In my Father’s house are many rooms; if it were not so, I would have told you. I am going there to prepare a place for you. And if I go to prepare a place for you, I will come back and take you to be with me that you also may be where I am. You know the way to the place where I am going.’” – John 14:16 (*Taken from The New International Version.*)

“Now we see but a poor reflection as in a mirror; then we shall see face to face. Now I know in part; then I shall know fully, even as I am fully known.” – 1 Corinthians 13:12 (*Taken from The New International Version.*)

The ‘**Committal**’ from ‘*Common Worship.*’ (The Church of England Prayer Book)

“We have entrusted our brother/sister....to God’s mercy,

and we now commit his/her body to be cremated/to the ground:

Earth to Earth, Ashes to Ashes, Dust to Dust:

in sure and certain hope of the resurrection to eternal life through our Lord Jesus Christ,

who will transform our frail bodies that they may be conformed to his glorious body,

who died, was buried, and rose again for us.

To him be glory for ever. Amen.”



Christian Glossary

Anoints	The sacrament of placing holy oil on the body of a person. This is done by a priest for a dying person to help them on their journey to eternal life.
Bereavement	The period that follows when someone has lost someone/something, usually when someone/something has died.
Bishop	A name for the leader of the Christian community.
Burial	When a person who has died is buried in the earth.
Chapel	A Christian place of worship.
Christian	A follower of Christianity.
Church	A Christian place of worship.
Coffin	The container in which the body of the person who has died is placed for burial or cremation.
Commemorate	Remembering something.
Committal	The prayer that is said at a funeral when Christians pray over committing the body of the person who has died to be cremated/to the ground in the sure and certain hope that the person will be raised to eternal life.
Consecrated	Blessed by a priest, bishop or other faith leader.
Cremation	When the body of a person who has died is cremated (burned.)
Crematorium	The place where a cremation takes place.
Crucifixion	Being put to death by being placed on a cross and left to die.
Easter Day	The greatest festival of Christianity, when Christians celebrate the resurrection of Jesus.
Epitaph	A sentiment or statement about the person who has died which is placed on their gravestone.
Eternal life	Everlasting life which Christians have been promised by God that they will have after death.

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Eulogy	A review of the life of the person who has died. This is shared at the funeral service and may be given either by the Priest or a family member/one of the friends of the person who has died.
Good Friday	The Friday before Easter Day when Christians commemorate the crucifixion of Jesus.
Grave	The place where a person who has died is buried.
Gravestone	A stone that is laid to mark the place where a person who has died is buried. Details about the person's life are written on the gravestone.
Grief	A feeling of something missing and emptiness that a person can experience when someone / something close to them has died.
Grieving	Enduring the pain that someone can feel when someone/something close to them has died.
Holy Oil	Oil that has been blessed by a priest or bishop and may be used by them in the sacrament of anointing a person who is dying.
Loss	A feeling of something missing and the emptiness that a person can experience when someone / something close to them has died.
Memorial Service	A religious service that may be held some time after a person has died for their family and friends to celebrate the life of their loved one and in which to remember them.
Minister	A name for the leader of the local Christian community.
Priest	A name for the leader of the local Christian community.
Resurrection	The rising of Jesus from the dead, which forms the basis of Christianity.
Spirit	The inner nature of a being, the soul.
Soul	The inner nature of a being, the spirit.

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The Journey of Life and Death



Death and Dying in Buddhism

Traditional Buddhists believe that when people die they are reborn as another **being** - and not always as a human being. The English word for this is **rebirth** (*bhavana* or *jati* in Sanskrit, the language in which many Buddhist sacred texts are written).

When beings die, Buddhists believe that they are reborn in one of the six realms of existence.

Rebirth and the Six Realms

Buddhists believe that there are many kinds of beings in the universe. Some live very long lives. Some others live only for a few hours. Some beings live happy lives full of pleasure. Some others have lives full of suffering and unhappiness.

The Buddha taught that all things change and pass away, including everyone and everything we like and love; and whatever kind of being we are now - for example a human or an animal - we won't stay like that forever. Buddha taught that lives may be short or long, happy or unhappy, but the one thing humans all have in common is that we will die at some point, and when that happens we will be reborn as another being, maybe a completely different kind of being. This is why Buddhists teach that we should always try to be kindly to other living things because we are all connected together, like members of one great family.

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The Journey of Life and Death

In traditional Buddhism there are said to be six kinds of beings who live in the six realms of existence:

- First there are humans.
- Then there are animals (which includes all the different kinds of insects).
- Then there are the **devas** (gods) who live for a very long time in a kind of heaven, filled with light and many pleasant things.
- Next are the **asuras** (jealous gods) who are powerful warriors, always fighting a war against the devas.
- In the past people everywhere believed in other kinds of non-human beings, like ghosts and fairies, who hang around the edges of our human world. In Buddhism the name for the place where these beings live is called the **preta** (spirit) realm. Pretas often live lonely lives and suffer from hunger and thirst.
- The last kind of beings live in **naraka** (hell) which is a horrible nightmarish place full of pain and suffering.

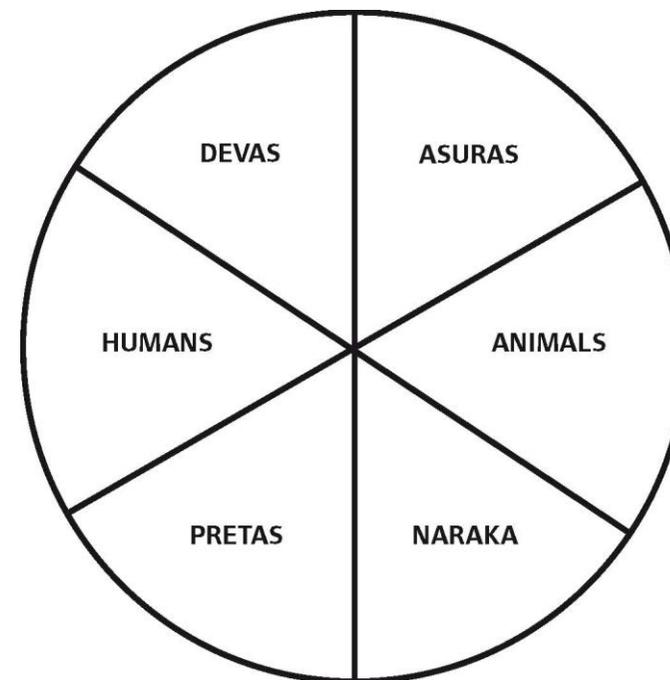
The endless cycle of the birth and death of beings through the six realms is called **samsara**, which means something like 'continually moving on'. All beings are trapped in samsara.

The deva, asura and human states are called the higher realms. The animal, preta and hell states are the lower realms. It's only in the higher realms that we can do good actions and become wise enough to get free from samsara.

Karma and Rebirth

Buddhists believe that the things people do and the way we think is important in this life and also affects the kind of **rebirth** we will have. This is the idea of **karma**, which means 'action'. In Buddhism it matters how we behave. The way we act now shapes our present life. But our actions also have a powerful influence on the kind of being we become after we die and are reborn.

For example, when our minds are filled with angry thoughts towards other people, we always want to fight and other people become frightened of us. We may have very few friends and make lots of enemies. Always being angry causes a negative kind of karma and makes us very unhappy and lonely in this life. Buddhists believe that after someone like that dies, because of the habit of being angry, they are more likely to be born somewhere where they are surrounded by lots of fighting. On the other hand, if we are kind, generous and work for the happiness of others, this creates good karma, and we will probably be reborn in one of the higher realms.



The Journey of Life and Death



Things Buddhists do for dying people

Buddhists think that it is important for people to die in a peaceful place, cared for by those they know and trust.

Sometimes the dying person will be visited by their Buddhist teachers who chant special verses. They might also re-take some of their Buddhist vows. Dying people are encouraged to let go of the attachment to this life by giving away their wealth for the benefit of others - maybe to help support a monastery or print Buddhist texts, but also to help relieve suffering and poverty in the world.

After Death

Immediately after death, it is common for Buddhist scriptures to be chanted around the body, and for people who were close to the dead person to say farewell and make wishes for them to have a happy rebirth. Buddhist ceremonies are performed, and the benefit of doing the ceremony is dedicated to the person who has died, to make sure they are born as another human being.

In Buddhism the body is usually cremated, following the example of the Buddha. The destruction of the body through fire is thought to be a very powerful teaching on impermanence and helps the family and friends to realise that the person has left this life and cannot return.

Rebirth

In South East Asian countries the person who dies is thought to be reborn immediately after dying. In Tibetan and Chinese Buddhism there is said to be a period of seven weeks between one life and the next.

In Tibetan Buddhism, a picture of the dead person is sometimes placed on the shrine for seven weeks. Special words are chanted regularly during this period. On the 49th day, the picture is burned, and special prayers are made.

In many East Asian Buddhist countries special prayers are made for the dead person to be reborn in a **Pure Land**, a happy place where they can learn much more about the Buddha's teachings and train in ways to help free other beings from suffering.

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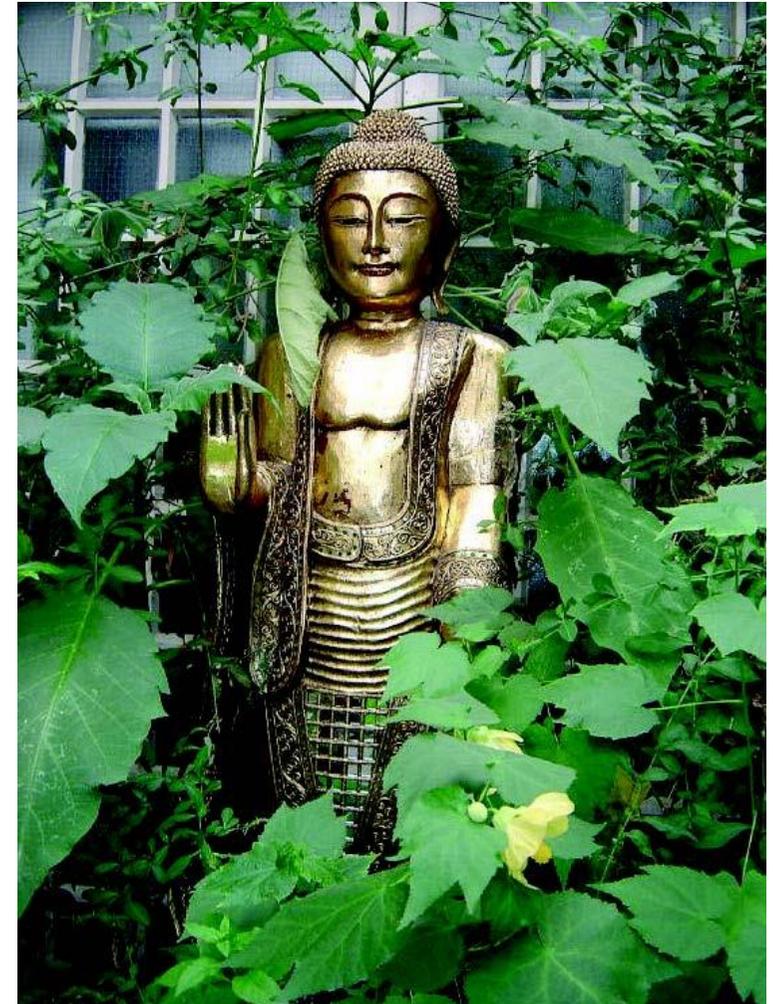


The Journey of Life and Death

Buddhist Glossary

Asura	'Jealous God' – one of the six realms
Being	Every kind of living thing, apart from plants.
Deva	'God' – one of the six realms. A bit like Heaven, but doesn't last.
Karma	Actions with a strong intention that influence not only the current life, but also future rebirths.
Naraka	'Hell' – one of the six realms. Like hell, but doesn't last.
Preta	'Spirit' or 'Hungry Ghost' – one of the six realms.
Pure Land	'Buddha Realm'. A kind of temporary heaven presided over by a Buddha, where people can go further on the Buddhist path.
Rebirth	The process by which beings are endlessly born into one of the six realms. The traditional Sanskrit words for this are <i>Bhavana</i> which means 'becoming' or <i>Jati</i> which is 'birth'.
Samsara	The endless cycle or wheel of birth and death, driven by the actions of beings (karma).
Six Realms	The six realms cover all the possible kinds of beings that exist in the universe. None of these realms are permanent.

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The Journey of Life and Death



Rituals Related to Death in The Hindu Family

Hindus believe in **reincarnation**. They believe that death is the start of a long sleep for the soul, before it sets out on a new life. Hindus believe that death is part of the cycle of life and is what happens before you set out on a new life.

Each life teaches new lessons and brings a soul closer to God. Good deeds will bring you nearer to God and bad deeds will push you away from him so that you will just stay in the cycle of life and death and not move towards freedom.

What happens when a Hindu dies?

Where possible, relatives gather around a dying person, dip a leaf of sweet basil in water from the Ganges or milk, and place this on the lips of the dying person while they sing holy songs and read holy texts. If available, a special funeral priest is called. A light is lit in the home which is kept alight for twelve days. The “**chief mourner**” leads the rites. This person is either the eldest son in the case of the father’s death or the youngest son in the case of the mother. If there are no sons the work will be done by the nearest male relative.

After death, the chief mourner performs arati, passing an oil lamp over the remains, and then offering flowers. The body is prepared for **cremation**. Sesame oil is applied to the dead person’s head. The body is bathed with water, anointed with salve of sandalwood, kum kum powder and vibuthi from the nine **kumbhas**, dressed in best clothes and placed in a coffin. The women then walk around the body and offer puffed rice into the mouth to nourish the deceased for the journey ahead. A widow will place her **Mangalsutra** around her husband’s neck, signifying her enduring tie to him. The coffin is then closed. The ritual **homa** fire can be made at home or kindled at the crematorium.

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The Journey of Life and Death



The Funeral

How a Hindu funeral is organised differs in India and in the UK

In India

These days, in most families the body is laid in a coffin and covered with flowers before it is driven to the crematorium. In the crematorium, a small candle or oil lamp (Diwali lamp) is lit, which the main mourner holds in his hand while carrying a container of water on his shoulder. He circles the dead person three times, and a hole is made in the container each time he goes around. The coffin is then moved to the cremation room (Shamshan ghat). Only men go to the cremation site, led by the chief mourner.

When there is a funeral pyre, the body is carried three times counter-clockwise around the pyre, and then placed upon it. At each turn around the pyre, a relative knocks a hole in the water container with a knife, letting water out, signifying life is leaving its vessel.

In the UK

The body is laid in a coffin and covered with flowers before it is driven to the crematorium. In the crematorium, a small candle or oil lamp (Diwali lamp) is lit.

At a gas-fuelled crematorium, sacred wood and ghee are placed inside the coffin with the body. Where permitted, the body is carried around the chamber, and a small fire is lit in the coffin before it is consigned to the flames. The chief mourner then engages the cremation switch.

Returning home, everyone bathes and shares in cleaning the house. A lamp and water pot is set where the body lay in state. The water is changed daily, the picture of the deceased is placed in a room and a garland is placed on it. A lamp is lit next to it and is kept lit for twelve days.

The family shrine room is closed, with white cloth draping all images. During these days of ritual impurity, family and close relatives do not visit other homes, though neighbours and relatives bring daily meals to relieve the burdens during mourning. The mourners do not attend festivals, temples, visit swamis, nor take part in marriage arrangements. Some families observe this period for up to one year.

About twelve hours after the cremation, men from the family return to collect the remains. Water is sprinkled on the ash; the remains are collected on a large tray. At crematoriums the family can arrange to personally gather the remains: ashes and small pieces of white bone called "flowers." In crematoriums these are ground to dust, and arrangements must be made to preserve them. Ashes are carried or sent to India for depositing in the Ganges or are placed in an **auspicious** river or the ocean, along with garlands and flowers.

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The Journey of Life and Death

Helping the family

After the cremation, friends visit the bereaved family for the next two weeks, to pay their respects and provide support. Devotional songs are sung and scriptures are read from the Ramayana. This period may be longer if it is a young person who has died or it is an unexpected death. The friends and family talk together about the dead person, share happy memories about their lives with that person and help around the home. Hindus believe that by sharing their grief with each other, the amount of grief will be halved. They believe that although everyone will miss the deceased, death is not sad. The dead person has learned the lessons he or she was meant to learn in life and will move on nearer to God.

The Final Farewell

Each month during the first year after the death, a **pinda** rice-ball and bowl of water are offered in memory of the dead person. A widow will erase her **sindoo** and wear white clothes for the first year after her husband's death. Sons will hold a memorial service each year on the day of their father's death as long as they are alive.

At the yearly anniversary of the death (according to the moon calendar), a priest conducts the **shraddha** rites in the home, offering pinda to the ancestors. This ceremony is done yearly as long as the sons of the deceased are alive (or for a specified period). It is now common in India to observe shraddha for ancestors just prior to the yearly Navaratri festival. This time is also appropriate for cases where the day of death is unknown.

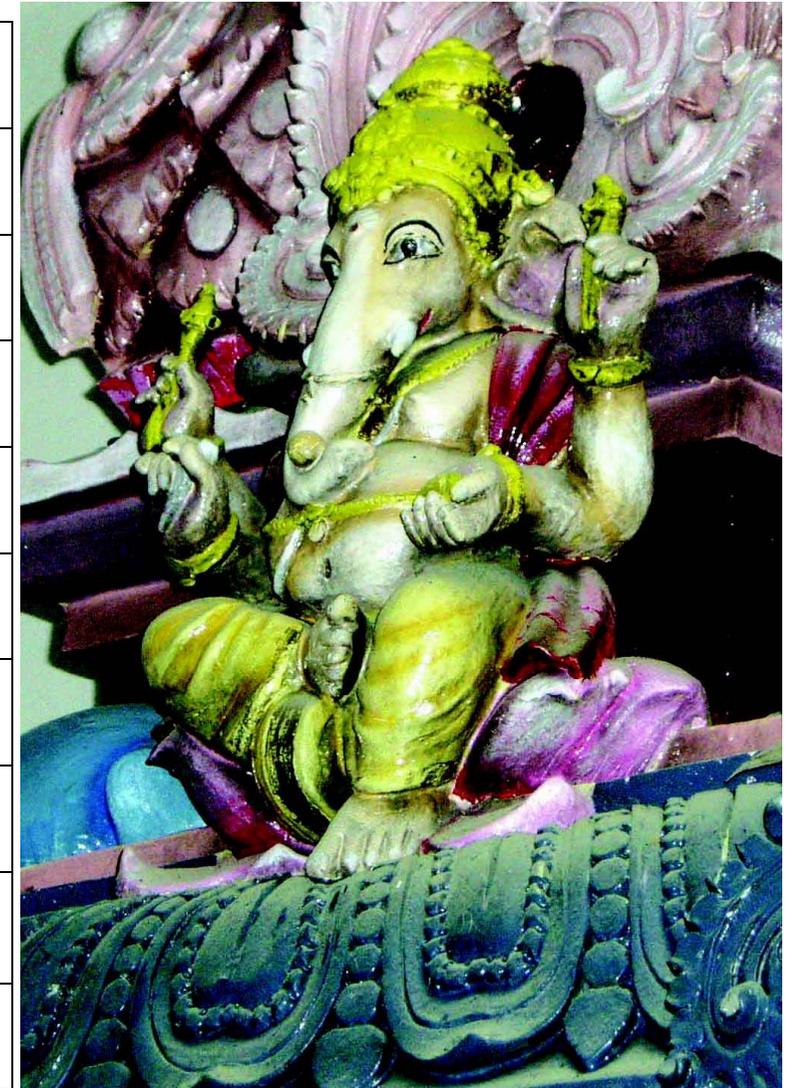
The Journey of Life and Death



Hindu Glossary

Auspicious	Lucky
Chief mourner	Either the eldest or the youngest son or the nearest male relative
Cremation	Burning
Homa	Fire used in worship
Kumbhas	Brass water pots
Mangalsutra	Wedding pendant
Pinda	Rice-ball
Reincarnation	Rebirth into a new body for another life
Shraddha	Hindu ritual of treating people to feasts in the name of the deceased
Sindoor	Marriage mark

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The Journey of Life and Death



Death and Bereavement in the Humanist Belief system

Death

Humanists believe that this is the one life we have. They believe that there are no gods, no heaven or hell, and that we no longer exist as people once we have died.

They believe that their bodies, or the atoms that make up their bodies, will continue to exist as part of the natural world. However, the person themselves will live on only in other people's memories, or in the work they have done while alive and left behind them, or in their children.

Many humanists, like many people, would prefer not to die. However, they believe that wanting something to be true is not the same as it being true. They believe that death is a natural part of life, and because we can't avoid that, it makes sense to try not to be afraid of it, but instead to come to terms with it. Then we can focus on finding meaning and purpose in the here and now.

For humanists, life is all the more precious because it comes to an end. Humanists have no expectation of reward or punishment after death. The main thing is to try to lead good and happy lives now, while we are alive, and to help other people do the same. We don't get another chance.

Humanists think that really important questions for all of us are 'How can I live a fulfilled and worthwhile life? How can I help others to do this? Asking the question "What would I like to be remembered for when I am dead?" helps people to think about the answers to these questions.

When a person is dying

Because humanists do not believe in gods or an afterlife, they believe that the important things to do when somebody is dying are the 'humane' things: supporting and comforting them as far as possible, alleviating their suffering, listening to and respecting their wishes as far as possible, helping their close relatives and friends who may also be suffering.

When someone dies

When someone they know dies, most people feel grief, sadness, shock, pain and possibly other emotions such as anger, guilt, or remorse. If they were close to the dead person, these emotions can be even more overwhelming.

The Journey of Life and Death



SESSION 4 AND 5 INFORMATION SHEET

Humanists believe that this is true for religious and non-religious people alike. The natural human response is to comfort, or seek comfort from, those around us, and humanists will do this in whatever way comes most naturally to them. This could include staying close, or 'being there' for someone; showing respect for the dead person; practical help; or simple expressions of sympathy.

A humanist funeral or memorial ceremony

Humanism has no rules about what should be done with the body of the person who has died, other than legal requirements. The body may be cremated, or buried, or even, if the person has left instructions, donated to medical science. There may be a funeral, or there may be a memorial ceremony separate from this.

A humanist funeral is a positive celebration of a person's life, specially created for that person and their family, with music, readings and time to reflect.

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- focus sincerely and affectionately on the person who has died
- allow friends, relatives and acquaintances to express their feelings and to share their memories
- celebrate the life of the person who has died by paying tribute to them, to the life they lived, the connections they made and left behind.

It will usually include:

- music that is in some way connected to the dead person: for example songs they liked, or that reminds their friends of them
- family or friends' memories or stories about the dead person.
- an eulogy: a talk focussing on the achievements of the dead person, and the meaning of their life.
- A brief period for quiet reflection. There will often be religious people amongst the mourners, and this can be a chance for them to offer their own private prayers if they wish.

It may also include readings of poetry and prose, a non-religious reflection on death, or symbolic actions like candle lighting, or formal words of goodbye and may be conducted by a trained humanist celebrant, or by family or friends themselves.

Humanists believe that a funeral like this helps the bereaved in their grief.



The Journey of Life and Death

Notes about Death and Bereavement in Judaism

SESSION 4 AND 5 INFORMATION SHEET

As death approaches an observant Jew would read, or have read for them, a Prayer of Confession followed by the **Shema**, a prayer said twice a day. The Shema declares that there is one G-d, which is the main belief of Judaism.

There are no services at the Synagogue concerning a funeral. Prayers are said at the cemetery in a prayer hall. Evening services are held in the 'House of Mourning' (usually the home of the deceased, or a close relative) followed by a memorial service. This starts on the eve of the funeral and continues for seven days (the shiva), (except for Shabbat – Sabbath)

At the 'House of Mourning' (**Bet Avel**), all shiny surfaces such as mirrors and TV's are covered. This is so that the mourners are not tempted to look at themselves, but think of their departed loved one. Great respect is shown to a person after death - as in life. A memorial candle is lit in the house after the funeral and is kept burning throughout the Shiva

Jews believe that the soul of the departed goes to Heaven and the Lord restores the souls to the dead.

Jewish people believe that all their good deeds are 'weighed up' against their bad deeds, with one angel speaking for their 'good deeds' and another angel speaking about their 'bad deeds'. When the good deeds outweigh the bad deeds, the soul can enter Paradise, or **Gan Eden**, the Garden of Eden.

Eternal Life is a cornerstone of Jewish belief. Jewish people believe that this life, life on earth, is a 'preparation' for the 'Heavenly World'. Jewish people also believe that their souls (but not their bodies) are destined for Eternal Life.

Jewish people believe all their deeds on earth are weighed in this way. They believe that their souls return to G-d in this way. After a person has died, the same respect is shown for them as when they were alive. With this in mind, the body is not left alone at any time. A 'watch' is kept from the time of death until the funeral. Funerals in the Jewish tradition are held very quickly, sometimes on the day of death, but usually on the next day.

It is very unusual for there to be a delay, except for **Shabbath** or a festival. A funeral would break the laws of **Shabbath** (the Jewish Day of Rest), as Shabbath is a day of joy.

The Journey of Life and Death



SESSION 4 AND 5 INFORMATION SHEET

Jewish people are always buried in a Shroud. Men are buried in their **Tallit** (Prayer Shawl) over the Shroud. Coffins are always plain, with no decoration or adornments, and made of unpolished wood. It is not usual to have flowers at a Jewish funeral. These are all signs of the equality of all, in death.

The Mourners (**Aveylim**) at a funeral would be parents, siblings, children and spouse of the deceased.

One of the main customs to take place before the funeral, either at the Mourners' house before leaving for the funeral, or at the cemetery, is to 'Make **Kriah**'. A piece of clothing on each Mourner would be cut by a friend, relative or by the Rabbi. Kriah is always cut on an actual piece of clothing, such as a shirt or cardigan, but not a tie or scarf, etc. Kriah is cut on the left side of the clothing for a parent, (over the broken heart), and on the right for other relatives. This signifies the more intense grief for a parent. After the cutting, the garment is then torn further by the Mourner who recites the following blessing: "Blessed art Thou O Lord our king, King of the Universe, the true Judge "

Each Mourner will wear their torn clothing for the week of intense mourning known as the **Shiva** except on the Shabbat as there is no mourning on the Sabbath.

At every Jewish Cemetery there is a Prayer Hall. Prayers are said in the Prayer Hall both before and after the burial. A tribute may be paid before the burial by a friend or relatives or read by the Rabbi.

The service is aimed at honouring the deceased, and not at comforting the mourners. The service mostly consists of chanting of Psalms. No music is played and the chanting is not accompanied by an instrument. While walking to the graveside, Psalm 91 is chanted.

After the coffin is lowered into the ground, first the Aveylim, and then all those present who wish to, are invited to throw three spades full of earth into the grave. This is done until the entire coffin is covered, showing continuing concern for the deceased. The spade is not passed from hand to hand, but each person returns the spade to the mound of earth, for the next person to take. This is so each individual makes the choice to perform the act of his own free will and also that trouble is not passed on. The sound of the earth on the coffin is an act of finality. It helps all concerned to accept the death of the relative or friend. There are two parts of the final goodbye: respect for the deceased, and comfort for the mourners.

The Journey of Life and Death



SESSION 4 AND 5 INFORMATION SHEET

Before re-entering the Prayer Hall it is customary for all those who have been on the 'grounds' of the cemetery to wash their hands. This represents washing their hands clean of pre-occupation with death. Water is a symbol of life and a source of life in Judaism; no life survives without water. Washing of hands also shows faith that death is not the end, and that life, for the living, must go on. If there are ten men (boys aged over 13 years and one day and men) present, the service in the Cemetery will conclude with the Aveylim reciting the Mourners Prayer, or **Kaddish**. This prayer declares the greatness of G-d, and the acceptance of his will. If there are not ten men (a **Minyan** or quorum) present, this prayer cannot be said.

On taking their leave of the Aveylim, both from the cemetery, and later from the House of Mourning, visitors wish each Mourner a 'Long Life'. This is one of the ways Jewish people tell each other to 'move on', and not let grief take over their lives. This is a very important concept in Judaism. Concern is for the living, while showing respect for the deceased.

It is considered to be an exceptional 'good deed', (**Mitzvah**), to 'accompany the dead' to their final resting place. This is because this is one Mitzvah for which no reward from the recipient can possibly be expected or given. It is not necessary to have known the deceased to accompany the dead'. It is still considered to be a very important Mitzvah.

There are two parts of the final 'goodbye'. respect for the deceased and comfort for the mourners.

On return from the Cemetery, the Aveylim eat a special 'meal', consisting of a hard-boiled egg, a bagel, and a piece of salt herring. This is called the 'Meal of Consolation'. The significance of these foods is as follows: The egg, for fertility, and for continuity, an egg has no beginning or end, as mankind has no beginning or end. The bagel, also for continuity, and, as bread, is the staff of life, the sentiment that life must go on. The salt herring signifies the sad time brought by the death of a relative or friend, and reminds us of tears. They also refrain from wearing leather shoes during the Shiva.

After the funeral, the Aveylim observe seven days of intense mourning. This period is called 'Shiva' meaning seven (days). A memorial candle is kept alight for all of the seven days. During this time, the Aveylim do not work, or beautify themselves, they do not cook or clean, and they sit on low chairs, and wear slippers, not leather shoes, all signs of mourning. They will not listen to music. Friends and relatives come to the house to speak to them and comfort them.

The Aveylim only leave the house to attend the Synagogue on **Shabbath**. Friends and family bring ready prepared food for the Aveylim. The three daily prayers (Morning, Afternoon and Evening) are held at the Shiva House for the week of mourning, except for on the Shabbath, as they are then said in the Synagogue. Kaddish is said by the Aveylim at each of these services, as long as there is the required Minyan.

The Journey of Life and Death



From the day of the funeral, thirty days of mourning are observed, referred to as '**Shloshim**', meaning 'Thirty' (days). During this time, the Aveylim do not go to parties, listen to music, watch TV, cut their hair, or shave their beards. After the first week of Shiva, the Aveylim continue to say Kaddish in the Synagogue, at all daily services. If an Aveylim is mourning the loss of a parent, these restrictions and prayers will continue for one year.

On the anniversary of the death of a relative according to the Jewish calendar starting at sunset of the previous day, (counting from creation), the Aveylim lights a candle in their home. The candle lasts for 24 hours, and is a reminder of the deceased. On this day, the Aveylim again does not listen to music or attend parties etc. The Aveylim would also say Kaddish in the Synagogue, as before.

Although it is acceptable to dedicate a memorial stone to mark the grave of a loved one after the Shloshim have elapsed, it is more customary to do so at the end of a year. A memorial service is held at the cemetery which gives family and friends a chance to show their respect even if they were unable to attend the funeral which would have been at very short notice.

Note: G-d has been used because it is Jewish practice not to write the Lord's name as this makes a document or paper holy.

The Journey of Life and Death



Jewish Glossary

Aveylim	Mourner
Bet aveyl	House of mourning
Kaddish	Mourners prayer or memorial prayer
Kriah	Cutting of mourners clothes
Minyan	Quorum of ten men (over 13 yrs and one day)
Mitzvah	Good deed
Shiva	Seven days of intense mourning
Shloshim	Thirty days of mourning
Tallit	Prayer shawl

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References

The Jewish Book of Mourners, Why? By Albert Kolach

www.mazornet.com/deathandmourning

Jewish Perspective of Death and Mourning.



The Journey of Life and Death

Notes about Death and Bereavement in the Muslim Faith

SESSION 4 AND 5 INFORMATION SHEET

Death

For Muslims, the purpose of life and death and of the afterlife in Islam is explained in the **Qur'an**. For a Muslim, death is the return of the soul to their Creator, **Allah**, and so the inevitability of death and the hereafter is never far from the Muslim's mind.

When a Muslim is dying

Family members and friends of the dying person should be informed and should support him or her in reminding them of Allah. They should be kind and patient and not leave the dying person alone.

They remind him or her:

- About all the good things that he or she has done, about Allah's mercy, and of Allah's forgiveness.
- Encourage the dying person to say: "**La ilaha illa-Allah.**"
- To lay the dying person so that the **Qibla** is on his right side.

Prophet Muhammad (pbuh) said: "Let no Muslim die except expecting and hoping the best from Allah."

What should be done when someone dies?

Muslims are recommended to do the following when someone dies:

- When the person has died, close their eyes and cover them.
- Prepare the body for burial without delay, as soon as death is confirmed by a doctor.
- Settle any debts of the dead person.

Informing Family and Friends

Muslims tell the family, friends, and other good people when someone dies so that they can attend the funeral. It is a Muslim's duty to offer condolences, comfort, and sympathy to the family and the relatives of the deceased.

Grieving for the Deceased

Muslims are agreed that crying and grieving for the dead is natural, but it is not acceptable to be angry with Allah for the person's death. It is allowed and acceptable for a Muslim to be sad and grieve for as long as they want to and as long as they need. However people are encouraged to not to give way to loud and outward mourning.

The Journey of Life and Death



Preparation of the Deceased

Wherever someone dies, it is very important that the body is taken to be washed as soon as possible. Muslims have been taught to treat the dead body with gentleness and respect. Cremation is forbidden. Instead, the body is washed, scented, and covered with clean cloth for burial. There are certain steps in the preparation of a Muslim's body for burial, these are:-

Ghusul - This involves a ritual washing like **wudu** and then there is a complete washing of the whole body. Male bodies are washed by men and female bodies are washed by women, these will often be close relations.

Kafan - This is the shroud that is used to wrap the body of the person who has died. The kafan is made up of two small cloths to cover private parts and three further sheets to wrap the body of a male. Five sheets are used to cover a female.

The Funeral

Praying for the person who has died and having funeral prayers at the mosque **Salat-ul-Janazah**, are essential in Islam. There is no call to prayer just before the funeral prayer because that call (Adhaan) has been made at the person's birth, so all of life is seen as an act of worship. The congregation pray to ask Allah to forgive the dead person's sins, have mercy on him or her and to grant them a place in **Jannah**.

Burial

The deceased person should be buried by Muslims as soon as possible in a Muslim cemetery. The body should be turned towards the Qibla. Generally graves should be simple. People may visit them afterwards to pray for the person who has died and to remember that there is an end to earthly life but also to reflect on the life after death.

Bereavement

The initial bereavement period lasts for three days, during which prayers in the home are recited almost continuously. Friends and community members will cook and bring food to the home of the deceased to support the family. They will also stay with them as much as possible to comfort the bereaved.

“**Allah** has created life and death as a test to see who is the better in conduct.”

From The Qur'an, Sura 67:2

Ref: What to do after a death? A practical guide for Muslims. www.gardens-of-peace.org.uk

The Journey of Life and Death



Muslim Glossary

Allah	God, in Arabic.
Ghusul	Washing of the dead body.
Hajj	Pilgrimage to Makkah. Hajj Robes are the robes worn by men during the Hajj. Women do not wear Hajj robes.
Jannah	This is paradise, a place that Muslims believe has been prepared as a reward for those who have lived a good life. 'A good life' means one that Allah considers good.
Kafan	Shroud used for wrapping the dead body.
"La ilaha illa-Allah"	"There is no god but Allah."
Qibla	Towards Makkah.
Qur'an	The final revealed message from God.
Salah-ul-Janazah	The funeral prayers.
Wudu	Ritual washing before prayer.

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Notes about Death and Bereavement in the Sikh Faith

Sacred Text

This text tells Sikhs to behave well in this life, so that when they die they will be able to stay with God and escape reincarnation.

'Strive to seek that for which you have come into the world, find through the grace of the Guru, God will dwell in your heart. You will abide in His presence, in comfort and in peace and not return ever to be born and to die once more.'

Guru Arjan

The Long Sleep

Many Sikhs believe in reincarnation. They believe that death is the start of a long sleep for the soul, before it sets out on a new life. Sikhs believe that death is part of the cycle of life and is what happens before you set out on a new life.

Each life teaches new lessons and brings a soul closer to God. Good deeds will bring you nearer to God and bad deeds will push you away from him and that you will just stay in the cycle of life and death and not towards freedom.

Sikhs believe that souls are rewarded for good deeds and that when all lessons are learned God will free them from the need to experience another life. Then they will be able to join God and be liberated (**mukti**) from the cycle of birth and death.

The Sikh holy book, the Guru Granth Sahib, says that mukti can only be achieved by living a God-conscious life, where everything you do is guided by the word of God. Sikhs believe that the only thing that you carry with you when you die are good deeds. (See Guru Nahak's story of the Rich Man and the Needle.)

What happens when a Sikh dies?

When a Sikh dies the evening prayer is said and everyone remembers God by saying '**Waheguru!**' meaning 'Wonderful Lord'.

Everyone is treated equally in Sikhism because Sikhs believe that everyone is of equal importance and was created by one and the same God, so no matter how wealthy or powerful a Sikh may be in this life, his or her funeral will be the same as the poorest Sikh's. Sikhs believe in cremation, not burial, as the body that is left is just a shell for which the soul has no more use. The cremation should take place as soon as possible, and in India it usually happens on the same day as the death, or the next day.

The Journey of Life and Death



SESSION 4 AND 5 INFORMATION SHEET

Before the cremation, the body is washed, traditionally yoghurt and water are used. It is then dressed in new clothes, including the Five Ks – the symbols of the Sikh faith: shorts, uncut hair, sword, bracelet and a comb. The body is then placed on a bier or in a coffin and covered with a plain cloth. It is brought home on the way to the funeral so that friends and relations can pay their respects to the dead person one last time.

When a death occurs, the family and friends make arrangements to read the Guru Granth Sahib. This can either be read whenever the bereaved wish or continuously (**Akhand Path**). The continuous reading takes approximately 48 hours to complete. Sometimes the Guru Granth Sahib is read over a week or more.

The Funeral

On the way to the place where the cremation takes place, the body is taken to the **Gurudwara** for prayers. It is not usually taken inside the building, the prayers are said outside the building. Then a procession takes the body to the funeral ground where it will be cremated.

Once they arrive, the friends and relations say a general prayer over the coffin. This is the concluding prayer (**Keertan Sohila**), and this is the same prayer which is said every night when the Guru Granth Sahib is placed in its resting place in the Gurudwara. At the cremation site the funeral pyre is lit. The eldest son usually does this. If the cremation takes place in a crematorium, the nearest relative will indicate when the cremation should begin. After the cremation, everyone returns to the Gurudwara for the *Bhog* service, in which **Shabads** (hymns) from the Guru Granth Sahib are recited and sung.

Everyone shares **Karah parshad**, a sweet which symbolizes equality of all humans, and they have a meal in the community kitchen, or **langar**. Both of these rituals symbolize equality to Sikhs. They also remind everyone that life must go on for those left behind. Sikhs often give money to charity at this time.

Helping the Family

After the cremation, friends visit the bereaved family for the next two weeks, to pay their respects and provide support. This may be longer if it is a young person who has died or it is an unexpected death. They talk together about the dead person, share happy memories about their lives with that person and help around the home. Sikhs believing that by sharing their grief with each other, the amount of grief will be halved. This will help bring the community together and may heal any family conflicts that existed before the person died.

Sikhs believe that although everyone will miss the deceased, death should not be sad. The dead person has learned the lessons he or she was meant to learn in life and will move on nearer to God.



The Journey of Life and Death

The Final Farewell

In Sikhism it is forbidden to erect a tomb of memorial to a dead person because Sikhs do not believe that the body is of any use after the soul has left it. In India, therefore, after a cremation many families arrange for the dead person's ashes to be taken to Kiratpur near Anandpur Sahib. There they are sprinkled onto the waters of a river. Sikhs living outside India that cannot arrange to travel there for this purpose will still arrange for the ashes to be scattered onto flowing water in the local river or sea.

Sikh Glossary

Akhand Path	The 48 hour continuous reading of the Guru Granth Sahib
Bhog	Food offering
Guru Granth Sahib	Last and everlasting Guru, Sikh holy book
Karah parshad	A sweet pudding which symbolizes equality of all humans
Keentan Sohila	Concluding prayer of the day for Sikhs
Langar	Food prepared and shared in the community kitchen
Mukti	Liberation
Shabads	Hymns
Waheguru	Wonderful Lord



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The Journey of Life and Death



Make some notes for your feedback under the name of the religion.

1. Which faith or belief are you studying?
2. Where do people of this community believe they go after death?
3. What can you find out about that place?
4. In this faith or belief what does it teach about how this life influences what happens to believers / people after death?
5. What rituals or traditions are used by members of this community when a believer has died?
6. Are there any special ways that this community has helped people to remember someone who has died?



From “Badger’s Parting Gifts”

“Although Badger was no longer with his friends, he had given each of them a special memory of him.

He wanted them to help each other using these gifts.

Even though Mole and his friends felt lost, alone and unhappy, in time their sadness melted like the winter snow.

They remembered the joyful moments they had shared with Badger and all that he had taught them, and they felt thankful that they had known him. As he had left them he had felt free and happy, not afraid.”

By Susan Varley





Peace

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<p>What this unit contains</p>	<p>This unit contains the following content from Christianity: How Christian places of worship give opportunities for peaceful reflection, meditation and prayer, e.g. worship in the Quaker tradition; Christian beliefs about ‘the Peace of God’; Jesus’ teaching ‘Blessed are the Peacemakers’; Martin Luther King and peaceful, non-violent protest. <i>Also content from one of the following two faiths, either:</i> Islam: As-Salaam, one of the beautiful names of Allah meaning the Source of Peace. As-Salaamu alaykum (Peace be upon you)’ as a greeting of peace, which is always shared by Muslims. <i>or</i> Hinduism: Non injury to living things - Ahimsa. Gandhi’s life - demonstrating Ahimsa in practice through non-violent protest. Teachers need to emphasise that peace and living harmoniously with your neighbour is an important belief of all religions.</p>																														
<p>Where the unit fits and how it builds upon previous learning</p>	<p>This is a unit to be taught in Key Stage 2 over half a term. It makes links with the Christianity work on the Bible, local Christian places of worship and Christian celebrations. Spend a moment each day, during the unit, reflecting in silence about peace.</p>																														
<p>Extension activities and further thinking</p>	<ul style="list-style-type: none"> • Find out about conscientious objectors from the Christian tradition and how the Quakers responded in World War 2. • Read Psalm 23 or Psalm 46: 10 – how might Christians or Jews interpret these in their lives? • Consider how to stand up for peace and take a stand against violence. How can you be a friend to others? • Consider what it might mean to ‘love your neighbour’ focusing on positive ways to contribute to support for people who are suffering from conflict. • Investigate beliefs about peace in other faiths. 																														
<p>Vocabulary</p> <table border="0"> <tr> <td>peace</td> <td>Muslim</td> <td>gentle</td> <td><i>other words</i></td> </tr> <tr> <td>peaceful</td> <td>Islam</td> <td>sea</td> <td><i>describing</i></td> </tr> <tr> <td>friend</td> <td>Hinduism</td> <td>sky</td> <td><i>qualities</i></td> </tr> <tr> <td>enemy</td> <td>Hindu</td> <td>asylum seeker</td> <td><i>generated by the</i></td> </tr> <tr> <td>refugee</td> <td>Ahimsa</td> <td>conflict</td> <td><i>pupils</i></td> </tr> <tr> <td>war</td> <td>kind</td> <td>confrontation</td> <td></td> </tr> <tr> <td>Christianity</td> <td>unkind</td> <td></td> <td></td> </tr> </table>	peace	Muslim	gentle	<i>other words</i>	peaceful	Islam	sea	<i>describing</i>	friend	Hinduism	sky	<i>qualities</i>	enemy	Hindu	asylum seeker	<i>generated by the</i>	refugee	Ahimsa	conflict	<i>pupils</i>	war	kind	confrontation		Christianity	unkind			<p>SMSC/Citizenship</p> <ul style="list-style-type: none"> • Peaceful reflection. • Peaceful resolution of conflict. • Investigate how communities function. • What peace means in an international context, and how this affects how people are able to live. 		
peace	Muslim	gentle	<i>other words</i>																												
peaceful	Islam	sea	<i>describing</i>																												
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refugee	Ahimsa	conflict	<i>pupils</i>																												
war	kind	confrontation																													
Christianity	unkind																														



Peace

Session 1. Key Questions: What is peace? What does peace mean in the world and to you?

Learning objectives	A T 1	A T 2	Suggested teaching activities	Sensitivities, points to note, resources
<p>Pupils should:</p> <ul style="list-style-type: none"> consider the meaning of the word 'peace' in secular and spiritual contexts; explore what peace can mean to them in their lives; explore what peace can mean with friends and family. 		<ul style="list-style-type: none"> ☐ ☐ ☐ ☐ ☐ 	<p>Introduce the word peace to the class and provide some thinking time while quiet music is played for them to reflect on what 'peace' is. Share children's ideas or feelings on what peace is and means to them.</p> <p>Talk about times when they feel peaceful. What influences that feeling for them, e.g. being on good terms with others, being in places and around people that make them feel peaceful? Make a class list of these influences.</p> <p>Read 'The Seeds of Peace' to the class and discuss the issues raised by the book. What does the old hermit mean when he says to the sad merchant "<i>Peace comes from within you. It is like a seed.</i>"?</p> <p>Encourage children to talk about whether feeling peaceful makes a difference to living alongside others. How is it different if they are feeling irritated and argumentative?</p> <p>Read 'Peacetimes' around the class and select some of the statements in the book to be illustrated by the class with pictures or photographs from their own lives or from newspapers or magazines illustrating topical situations.</p>	<p>Resources</p> <p>The Seeds of Peace by Berkeley, Barefoot Books. ISBN: 1-84148-006-1</p> <p>Peacetimes by Scholes, Belitha Press. ISBN: 1-85561-761-7</p> <p>Any peaceful music.</p>



Peace

Session 2. Key Question: What does Peace mean for countries and the people living in them?

Learning objectives	A T 1	A T 2	Suggested teaching activities	Sensitivities, points to note, resources
<p>Pupils should:</p> <ul style="list-style-type: none"> investigate what peace means in an international context; understand how this affects the way people are able to live; consider the peaceful resolution after conflict. 		<ul style="list-style-type: none"> ☐ ☐ ☐ ☐ ☐ 	<p>Consider what peace between countries means. What is different when there is no peace? What are the difficulties that lead to times of conflict?</p> <p>Talk about how it must be to live in a country where there is no peace. Investigate local issues around the dangers left behind by refugees or asylum seekers.</p> <p>Depending on topical news items, pupils may speak of issues to do with death and injury, lack of sanitation or food, lack of homes or education. Teachers will need to be sensitive to the anxieties of pupils, particularly those who have experienced war conditions, and channel their feelings to empathy and care for those enduring these experiences today.</p> <p>Consider how it must be to come to a time of peace after a time of war. Encourage empathy towards those seeking a safe haven.</p> <p>Read the story of the Peace Crane and make some peace cranes for the school, writing on them wishes for those who are not at peace.</p>	<p>Resources</p> <p>The story of the ‘Peace Crane’ ‘Peace One Day’ by Jeremy Gilley and Karen Blessen. Topical newspaper articles, radio and television news reports. Make use of internet news sites.</p> <p>Details of how to fold cranes can be found on: www.ppu.org.uk/learn/early/cranes_early_years.html</p> <p>Notes for Teachers:</p> <p>Ensure this lesson addresses current affairs.</p> <p>To send a thousand cranes to the Children’s Monument in Hiroshima’s Peace Park, string them on garlands of 100 cranes each, and mail them to: Office of the Mayor City of Hiroshima 6-34 Kokutaiji-Machi 1 Chome Naka-ku, Hiroshima 730 Japan</p>



Peace

Session 3. Key Question: What does peace mean to Christians?

Learning objectives	A T 1	A T 2	Suggested teaching activities	Sensitivities, points to note, resources
<p>Pupils should:</p> <ul style="list-style-type: none"> consider Christian beliefs about 'the peace of God'; reflect on Jesus' teaching 'Blessed are the Peacemakers'; know how Christian places of worship give opportunities for peaceful reflection, meditation and prayer. 	<p>☐</p> <p>☐</p> <p>☐</p> <p>☐</p>	<p>☐</p> <p>☐</p> <p>☐</p> <p>☐</p>	<p>To find out what Christians mean by 'the Peace of God' and how they feel this affects their lives, you might organise an opportunity for pupils to talk to local Christians about what this peace means to them in daily life and in times of difficulty. Alternatively before this lesson pupils might devise a brief questionnaire on this topic and send to the local church or e-mail to local Christians so that responses can be shared during the lesson. Pupils can also investigate worship in the Quaker tradition and how this is held in an atmosphere of meditative silence.</p> <p>Examine the Beatitudes from the Sermon on the Mount, when these were said and what Jesus meant by them.</p> <p>In groups illustrate Jesus' words by a collage of newspaper articles, speech bubbles, Power Point presentation, or through dance and/or drama.</p> <p>Talk about the places of worship that they know, e.g. the local church and in groups share information and ideas and record how the place or the areas within foster peaceful reflection, meditation and prayer.</p>	<p>Resources The Beatitudes. Newspaper articles, pictures, music etc. www.bbc.co.uk/religion/religions/christianity/subdivisions/quakers/worship.shtml beehive.thisislincolnshire.co.uk/default.asp?WCI=SiteHome&ID=7786&PageID=41567</p>

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Peace

Session 4. Key Question: How did Martin Luther King’s attitude to peace change lives?

Learning objectives	A T 1	A T 2	Suggested teaching activities	Sensitivities, points to note, resources
<p>Pupils should:</p> <ul style="list-style-type: none"> know how Martin Luther King’s faith led him to fight injustice through peaceful, non-violent protest. 	<p>□</p>	<p>□</p>	<p>Explain that over 40 years ago in the USA, before many of the pupils’ parents were even born, there were laws saying that white and black children couldn’t go to school together, and that people with darker skin had to ride in the back of a bus. Ask pupils, “What would you feel like if you came to school and you were told that, because you had brown hair or blue eyes or because you were a girl that you weren’t allowed to come here?”</p> <p>Display a picture of Martin Luther King. He was a Christian minister who spoke to many people; black and white, and taught them to stand up and say that the laws were wrong. He used only peaceful methods to solve problems. Martin Luther King had a dream that all kinds of children would go to school together and be friends, and that when people worked together, they were able to change the laws. Read part of Martin Luther King’s famous speech “I have a dream” and discuss its meaning.</p> <p>Martin Luther King was a very brave man who continued his work even when people tried to kill him and, through peaceful protest, changed laws that were unfair. After his assassination the US government designated a national holiday, the third Monday in January each year, to celebrate his life.</p> <p>Either:</p> <ul style="list-style-type: none"> Design a class flag for peace Make a friendship tree, each leaf with a wish for peace from a different member of the school community – afterwards make the leaves into a peace book. Make banners in home languages illustrating words such as peace, respect, joy, equality. 	<p>Resources</p> <p>Selma – a 2014 historical drama film based on the 1965 voting rights marches Selma – Montgomery, led by Martin Luther King. (http://www.imdb.com/title/tt1020072/)</p> <p>This session could be adapted so that students could alternatively study Malala, Rosa Parks, Mairead Maguire and Betty Williams, Wangari Maathai,</p> <p>http://gaps-uk.org/celebrating-nine-women-campaigners-for-peace-mairead-maguire-and-betty-williams/</p>

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Peace

Session 5a. Hinduism Key Question: How was Gandhi able to change attitudes peacefully?

Learning objectives	A T 1	A T 2	Suggested teaching activities	Sensitivities, points to note, resources
<p>Pupils should:</p> <ul style="list-style-type: none"> know that Ahimsa is an important concept in Hinduism; know that Gandhi was a famous Indian politician and campaigner through non-violent, peaceful protest; know how Ahimsa influenced Gandhi's life. 	<p>☐</p> <p>☐</p> <p>☐</p> <p>☐</p>	<p>☐</p> <p>☐</p> <p>☐</p> <p>☐</p>	<p>Explain and record the meaning of Ahimsa. Ahimsa is a Hindu religious concept which advocates non-violence and a respect for all life. Ahimsa is Sanskrit for avoidance of himsa, or injury. It is interpreted, most often, as meaning peace and reverence toward all sentient beings. List actions that promote and go against Ahmisa.</p> <p>Introduce the story of Gandhi. There are various books appropriate for primary schools that cover Gandhi's life. He was born in 1869, a Hindu and did not live an easy life. In the storytelling explain that he struggled to find freedom for his countrymen and to spread his belief in non-violent resistance. Gandhi practiced and engaged the theory of peace and justice as the world had never seen before.</p> <p>As a class reflect on the following from the UN Universal Declaration of Human Rights 1948: <i>"All human beings are born free and equal in dignity and rights. They are endowed with reason and conscience and should act towards one another in a spirit of brotherhood."</i></p> <p>Each pupil should record one local, national or world event that does not uphold this statement. How might Gandhi have responded to these?</p>	<p>Resources</p> <p>www.gandhiinstitute.org/AboutGandhi/index.cfm</p> <p>www.gandhiinstitute.org/www.en.wikipedia.org/wiki/Ahimsa</p>

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Peace

Session 5b. Islam Key Question: How do Muslims associate Peace with Allah?

Learning objectives	A T 1	A T 2	Suggested teaching activities	Sensitivities, points to note, resources
<p>Pupils should:</p> <ul style="list-style-type: none"> know that ‘As-salaam’, is one of the beautiful names of Allah meaning the ‘source of peace’; consider why the Muslim greeting ‘As-salaamu alaikum’ (peace be upon you) reflects their belief in Allah. 	<p>□</p> <p>□</p> <p>□</p> <p>□</p>	<p>□</p> <p>□</p> <p>□</p> <p>□</p>	<p>Make a class list of as many different greetings as can be recalled. Introduce the idea that the origin of the western handshake is that an open right hand showed you were not carrying a weapon; if two men met and offered each other empty right hands, this presumably meant that neither would stab the other. So the handshake was a sign of peace and peaceful intentions towards someone else.</p> <p>Muslims all over the world use the Islamic form of greeting, “Assalamu alaikum”, which means “Peace be to you”.</p> <p>Show pupils the section from ‘Pathways of Belief’ Islam where the names of Allah are introduced.</p> <p>Read the Qur’an quotes about Allah and, using beautiful writing, record some of the names and qualities of Allah.</p> <p>Record why you believe it is important for greetings to demonstrate that people welcome each other peacefully. Record peaceful greetings to be displayed to welcome visitors to the classroom.</p>	<p>Resources</p> <p>‘Pathways of Belief’: Islam programme 1 BBC Active DVD ‘Worship and Sacred Places’ Qur’an quotes about Allah.</p>

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Peace

Session 6. Key Questions: What does peace mean to us? How can we foster peace in our lives?

Learning objectives	A T 1	A T 2	Suggested teaching activities	Sensitivities, points to note, resources
<p>Pupils should:</p> <ul style="list-style-type: none"> express personal responses to the subject of peace; consider practical ways of becoming agents for peace in schools and in the wider community. 	<p>☐</p>	<p>☐</p>	<p>Display on the whiteboard the text of the Jewish prayer for peace read at the Lewisham Holocaust Memorial Day service and read it aloud to focus pupils on the meaning. Discuss the meaning of the prayer in the light of the topics studied in the previous lessons.</p> <p>Pupils should engage in one of the following:</p> <ul style="list-style-type: none"> Devise a proposal to the school council to consider having a peace event to link with local communities to let them know how the school feels about local conflicts. Make a Peace Table in the class/school as a special table for children to go to when there is a conflict to be worked out. Make a classroom pledge for Non-violence. Encourage family involvement by sending home copies of the pledges for families to work with their children to make family pledges. Learn about Nobel Peace Prize Winners and others who have worked for peace. Learn more about the United Nations and its efforts to keep international peace. Sing or compose songs celebrating peace, the earth and all people. Create playground games that promote cooperating and working together as a team rather than competitively. Write to local politicians, radio and TV stations, newspapers, etc. to spread the word of peace. 	<p>Resources Jewish prayer for peace.</p> <p>http://www.peaceoneday.org</p>

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Peace

Peace Cranes

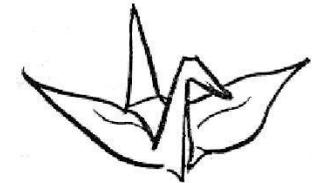


'Paper Crane, I will write peace on your wings and you will fly all over the world'.
Sadako Sasaki, age 12

An ancient Japanese legend says that your greatest wish will come true if you fold one thousand origami cranes.

Sadako Sasaki was only two years old when the atom bomb was dropped on Hiroshima, Japan in 1945.

She was not immediately affected but ten years later, as a direct result, she became very ill, developed leukaemia, and had to stay in hospital.



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While Sadako was in hospital, her best friend told her of the Japanese legend that if a person could fold 1,000 paper cranes, the gods would grant them a wish. Sadako wished to get better so that she could run again. She started folding cranes, but unfortunately she was only able to fold 654 before she died at the age of twelve.

Inspired by her courage and strength, Sadako's friends and classmates put together a book of her letters and published it. They began to dream of building a monument to Sadako and all of the children killed by the atom bomb. Young people all over Japan helped collect money for the project. In 1958, a statue of Sadako holding a golden crane was unveiled in Hiroshima Peace Park. The children also made a wish which is inscribed at the bottom of the statue and reads:

"This is our cry; this is our prayer, Peace in the world".

Today, people all over the world fold paper cranes and send them to Sadako's monument in Hiroshima.





Peace

Quaker Worship

John 4:23 "But the hour is coming - in fact, it is already here - for true worshippers to worship the father as he truly is, without regard to place. It is worshippers of this sort the father is looking for."

John 4:24 "God is not tied to this place, and those who worship God must worship him as he truly is, without regard to place."

Matthew 18:20 "In fact, wherever two or three are gathered together in my name, I will be there among them."

translation by the Jesus Seminar

Quakers worship together in two ways - 'unprogrammed', and 'programmed'. Whichever way they do so, when Quakers come together to worship God, they do so in obedience to these passages.



Peace

Quaker Worship (continued)

What do Quakers say? The following is an outline of what may happen during their Meeting for Worship developed by the Bristol Quakers

If you are wondering what *God* may be,
looking for a purpose in life,
craving company, or seeking solitude,
come to our Meeting for Worship!

We shall not ask you to speak or sing,

We shall not ask you what you believe,

We shall simply offer you our friendship,

And a chance to sit quietly and think,

And perhaps somebody will speak, And perhaps somebody will read,

And perhaps somebody will pray, And perhaps you will find here that which you are seeking...

We are not saints, we are not cranks,

We are not different -

Except that we believe
that *God's* light is in us all,
waiting to be discovered.

www.digitalbristol.org/members/quakers/worship.html



Peace

The Beatitudes

When Jesus saw the crowds, He went up on the mountain, and after He sat down, His disciples came to Him. He opened His mouth and began to teach them, saying...

Beatitudes

"Blessed are the poor in spirit, for theirs is the kingdom of Heaven.

Blessed are those who mourn, for they shall be comforted.

Blessed are the gentle, for they shall inherit the earth.

Blessed are those who hunger and thirst for righteousness, for they shall be satisfied.

Blessed are the merciful, for they shall receive mercy.

Blessed are the pure in heart, for they shall see God.

Blessed are the peacemakers, for they shall be called sons of God.

Blessed are those who have been persecuted for the sake of righteousness, for theirs is the kingdom of Heaven.

Blessed are you when people insult you and persecute you, and falsely say all kinds of evil against you because of Me.

Rejoice and be glad, for your reward in Heaven is great; for in the same way they persecuted the prophets who were before you."



Peace

Martin Luther King Jnr



Martin Luther King Jnr's work in America led to him receiving the Nobel Peace Prize. This is an extract from his acceptance speech.

Page 571
We will not build a peaceful world by following a negative path. It is not enough to say "We must not wage war."

It is necessary to love peace and sacrifice for it. We must concentrate not merely on the negative expulsion of war, but on the positive affirmation of peace.'



Peace

Excerpt from Martin Luther King's Dream speech

'I say to you today, my friends, that in spite of the difficulties and frustrations of the moment, I still have a dream. It is a dream deeply rooted in the American dream.

I have a dream that one day this nation will rise up and live out the true meaning of its creed:
"We hold these truths to be self-evident: that all men are created equal."

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I have a dream that one day, on the red hills of Georgia, the sons of former slaves and the sons of former slaveowners will be able to sit down together at a table of brotherhood.

... I have a dream that my four children will one day live in a nation where they will not be judged by the color of their skin but by the content of their character. I have a dream today.

I have a dream that one day the state of Alabama ... will be transformed into a situation where little black boys and black girls will be able to join hands with little white boys and white girls and walk together as sisters and brothers. I have a dream today.

... With this faith we will be able to work together, to pray together, to struggle together, to go to jail together, to stand up for freedom together, knowing that we will be free one day.'



Peace

Gandhi

Gandhi was born in a town in the north-west of India, to a rich family of the merchant caste. He went to England as a young boy where he trained as a barrister and took his bar finals in 1891.

His political career started in South Africa. Appalled by the treatment of Indians there he organised his first peaceful protests and succeeded in repealing some of the discriminatory laws. He also worked as a stretcher carrier in the Boer War, preaching self-denial and pacifism.

On his return to India, he travelled the countryside on foot, talking and learning from the ordinary people. He joined the Indian National Congress turning it from a largely powerless political organisation into a mass movement with millions of ordinary peasant followers. He founded the Sabarmati Ashram near Ahmadabad which was part school, part refuge, and part headquarters for the independence movement.

Gandhi came to international attention in 1930 with the Salt March which led to his first arrest and imprisonment. Time magazine named him Man of the Year and the following year he was released from jail. The press coverage brought him more supporters. In 1942 he threatened a mass campaign of civil disobedience and was again imprisoned. India rioted so his power only grew. However whenever his followers failed to contain their violence he would atone for it with periods of fasting and self-denial. The authorities were terrified he would die in jail, and he was released after 21 months.

In 1947, after World War 2, India was granted independence as Britain no longer had the will or resources to oppose Gandhi. However Britain introduced partition, dividing India into the main Hindu region and creating Pakistan, a Muslim country. This was a great disappointment to Gandhi as his lifelong aim had also been to bring together the divided religions of India.

In his talks, Gandhi quoted from different religions to increase mutual understanding. Over a million people died in the rioting that followed partition. He continued to work to reunite India and Pakistan but the people would no longer follow him as before. Four months after partition, on January 30 1948, a right-wing Hindu nationalist shot him.



Peace

Gandhi quotes

"Ahimsa means not to injure any creature by thought, word or deed, not even to the supposed advantage of this creature."

Page 574 Truth is my religion and Ahimsa is the only way of its realisation."

I do not envisage God other than truth and non-violence. If you have accepted the doctrine of Ahimsa without a full realization of its implications, you are at liberty to repudiate it. I believe in confessing one's mistakes and correcting them. Such confession strengthens one and purifies the soul. Ahimsa calls for the strength and courage to suffer without retaliation, to receive blows without returning any."



Peace

Qur'an Quotes about Allah

Allah is He, other than Whom there is no other god;
Who knows both what is hidden and what can be witnessed;
He is the Most Compassionate and Merciful.

Allah is He, other than Whom there is no other god;
the Sovereign, the One, the Source of Peace,
the Guardian of Faith, the Preserver of Security,
the Exalted, the Compelling, the Supreme.

Glory be to God, beyond any associations.

He is Allah, the Creator, the Evolver, the Bestower of Form.

To Him belong the Most Beautiful Names:

Whatever exists in heaven and earth declares His Praise and Glory.
And He is Exalted in Power, the Wise.

Al Hashr (exile) 59:22 – 24. tr. Helminski

As-Salam

The Source of Peace.

And know that God invites man unto the abode of peace,
and guides him that wills to be guided onto a straight way.

Yunus (Jonah) 10:25. tr. Asad



Peace

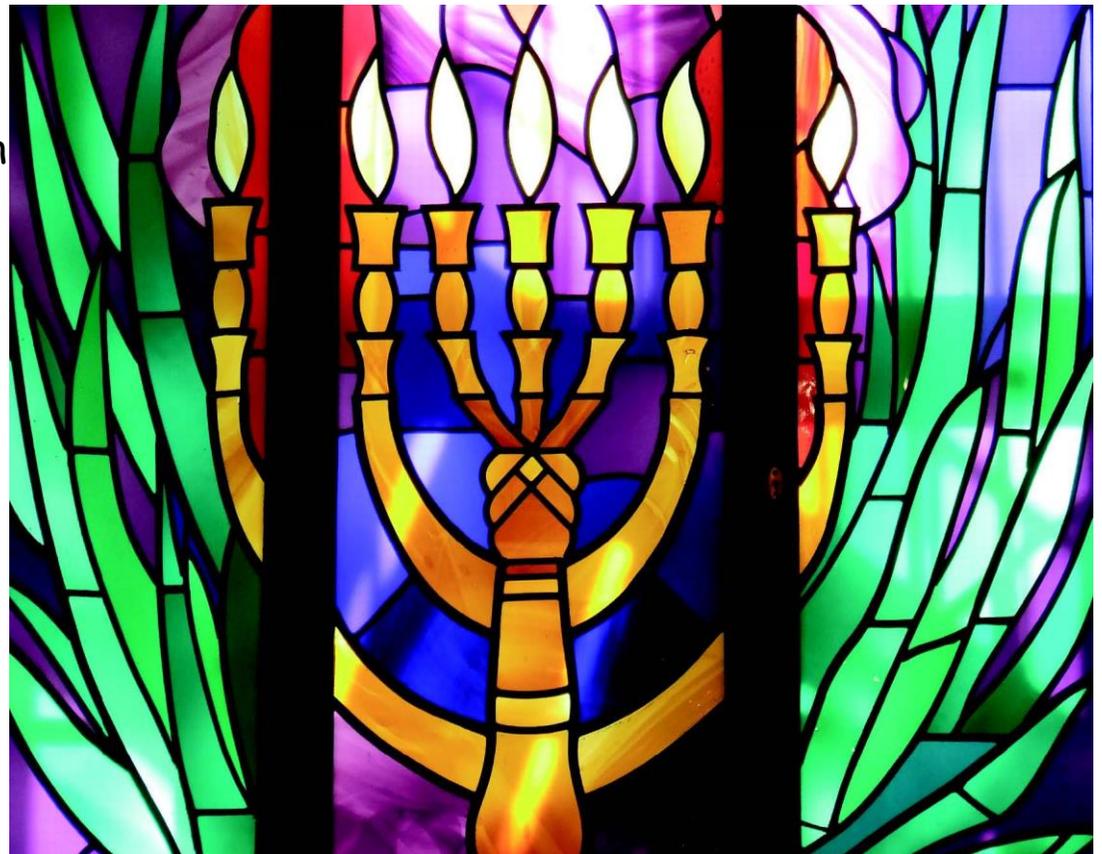
Jewish Prayers for Peace

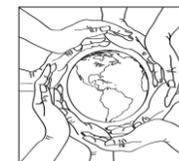
O God, whose name is peace, and who commands us to seek peace, send peace to your world and to all its inhabitants, so that all may dwell in safety with none to make them afraid. Too long has your world been darkened by the shadow of terror and death. Too many tears have been shed by families stricken by grief. Too many lives have been lost, too much hope destroyed by hate.

Therefore, O God of life, teach Your children to cherish life, so that the days of bloodshed may end, and enemies become neighbours and the sounds of grief be stilled.

O God, who heals the broken-hearted and binds up their wounds, send Your healing to the injured and Your comfort to those who mourn, freedom to those held hostage, and hope in place of fear. May God give strength to His creatures and may He bless us all with peace.

Amen





Understanding Faith and belief in Lewisham – compulsory unit

An opportunity for each school to design its own unique RE unit of work for Upper KS2

Key questions to be addressed by this unit:

- what can we discover about the faiths and beliefs in our class and school?
- what can we discover about the faiths and beliefs in the local community and Lewisham borough?
- how have faith and belief communities in Lewisham changed over the past 50 years?
- what are the reasons for changes in these communities?
- how do faith groups work in partnership with each other and the local community?
- how has life in Lewisham been enriched by the diversity of the faiths and beliefs that make up the borough?

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<p>Beliefs, teaching and sources – <i>What do people</i></p> <ul style="list-style-type: none"> • recall beliefs, teaching and sources of relevant faiths • identify key beliefs of smaller local communities, not previously studied, e.g. Rastafarianism 	<p>Practices and ways of life – <i>How do people live their lives?</i></p> <ul style="list-style-type: none"> • are there any ways where practices and ways of life are shared with, or impact on, the broader community? • how have practices and experiences changed over the years? 	<p>Forms and expressing meaning – <i>How do people show their beliefs?</i></p> <ul style="list-style-type: none"> • how do faith & belief communities show and share their beliefs and faiths in the wider community? Has this changed? • do people from the same faith do things differently because of their family's link to other countries, e.g. specific foods eaten at
<p>Identity, diversity and belonging – <i>What does it mean to be a member of a faith locally, nationally and globally?</i></p> <ul style="list-style-type: none"> • to which communities do the class belong? • what communities make up the school, area and borough? • how has this changed in the past 50 years? 	<p>Meaning, purpose and truth – <i>How does faith help people to have an understanding of life's journey?</i></p> <p>how do faith & belief communities support members of other communities when they have a need (times of celebration or crisis).</p>	<p>Values and commitment – <i>What is important to me and my faith?</i></p> <ul style="list-style-type: none"> • do you need to have a faith or belief to have values? • does the broader community link people of faith and belief with those that have no religious faith?

Key Stage 3

Key Stage 3 Programmes of Study



Buddhism

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Christianity



Hinduism



Islam



Judaism



Sikhism



Key Stage 3 Statutory Content

Introduction and Programmes of Study

Throughout Key Stage 3, pupils should be extending their understanding of Christianity and the other principal religions in a local, national and global context. They deepen their understanding of important beliefs, concepts and issues of truth and authority in religion and apply their understanding of religious and philosophical beliefs, teachings and practices to a range of ultimate questions and ethical issues, with a focus on self-awareness, relationships, rights and responsibilities. They enquire into and explain some personal, philosophical, theological and cultural reasons for similarities and differences in religious beliefs and values, both within and between religions. They interpret religious texts and other sources, recognising both the power and limitations of language and other forms of communication in expressing ideas and beliefs. They reflect on the impact of religion and belief in the world, considering both the importance of interfaith dialogue and the tensions that exist within and between religions and beliefs. They develop their evaluative skills, showing reasoned and balanced viewpoints when considering their own and others' responses to religious, philosophical and spiritual issues.

Knowledge, skills and understanding

Attainment Target 1: Learning about religion

Pupils should be taught to:

- investigate and explain the differing impacts of religious beliefs and teachings on individuals, communities and societies;
- analyse and explain how religious beliefs and ideas are transmitted by people, texts and traditions;
- investigate and explain why people belong to faith communities and explain the reasons for diversity in religion;
- analyse and compare the evidence and arguments used when considering issues of truth in religion and philosophy;
- discuss and evaluate how religious beliefs and teachings inform answers to ultimate questions and ethical issues;
- apply a wide range of religious and philosophical vocabulary consistently and accurately, recognising both the power and limitations of language in expressing religious ideas and beliefs;
- interpret and evaluate a range of sources, texts and authorities, from a variety of contexts;
- interpret a variety of forms of religious and spiritual expression.

Key Stage 3 Statutory Content

Attainment Target 2: Learning from religion

Pupils should be taught to:

- reflect on the relationship between beliefs, teachings and ultimate questions, communicating their own ideas and using reasoned arguments;
- evaluate the challenges and tensions of belonging to a religion and the impact of religion in the contemporary world, expressing their own ideas;
- express insights into the significance and value of religion and other world views on human relationships personally, locally and globally;
- reflect and evaluate their own and others' beliefs about world issues such as peace and conflict, wealth and poverty and the importance of the environment, communicating their own ideas;
- express their own beliefs and ideas, using a variety of forms of expression.

Breadth of study

Through conversations with schools, the Lewisham Agreed Syllabus Conference members are aware of different models of curriculum planning being provided at Key Stage 3 in Lewisham schools. Whilst some schools continue to provide a three-year Key Stage 3 programme, others have been required to shorten the programme by between a term and a year. This makes delivery of an Agreed Syllabus planned to be taught across 3 years impossible for some schools, so the Agreed Syllabus has been remodelled to provide for all of these eventualities.

Materials in the syllabus are now labelled core and optional. All students should be taught the core units, whichever delivery model has been implemented. Every unit, whether core or optional should be allocated approximately a half term or six sessions for delivery if both Attainment Targets are to be addressed.

Key Stage 3 Statutory Content

Whichever model of delivery a school has allocated, the following tables explain what should be taught:

Table 1 - Statutory Units

Unit	Equivalent in half terms
Buddhism	1 unit
Christianity	4 units
Hinduism	1 unit
Islam	1 unit
Judaism	1 unit
Sikhism	1 unit

Depending on the length of the course, three, six or nine optional units should be selected from Table 2.

If a school delivers an extended programme, it is expected that at least some of the faith units will be selected from the optional list.

Schools may wish to take into account the faiths studied at Key Stage 4/GCSE and ensure that the optional units for these faiths are studied at Key Stage 3.

Table 2 - Optional Units

Unit	Equivalent in half terms
Baha'i	1 unit
Buddhism	1 unit
Christianity	1 unit
Creation and origins*	1 unit
Hinduism	1 unit
Humanism	1 unit
Islam	1 unit
Judaism	1 unit
Non-Religious World Views	1 unit
Other World Faiths	1 unit
Philosophy & Ethics	1 unit
Sikhism	1 unit

* An expanded exemplar unit planner is also included

Key Stage 3 Statutory Content

During this key stage, pupils should be taught the knowledge, skills and understanding through the areas of study described above. They will also be considering the following:

Themes

- Beliefs and concepts: the key ideas and questions of meaning in religions and beliefs, including issues related to God, truth, the world, human life, and life after death.
- Authority: different sources of authority and how they inform believers' lives.
- Religion and science: issues of truth, explanation, meaning and purpose.
- Expressions of spirituality: how and why human self-understanding and experiences are expressed in a variety of forms.
- Ethics and relationships: questions and influences that inform ethical and moral choices, including forgiveness and issues of good and evil.
- Rights and responsibilities: what religions and beliefs say about human rights and responsibilities, social justice and citizenship.
- Global issues: what religions and beliefs say about health, wealth, war, animal rights and the environment.
- Interfaith dialogue: a study of relationships, conflicts and collaboration within and between religions and beliefs.

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The delivery of RE in this key stage should enable the following Experiences and Opportunities

- Encountering people from different religious, cultural and philosophical groups, who can express a range of convictions on religious and ethical issues.
- Visiting, where possible, places of major religious significance and using opportunities in ICT to enhance pupils' understanding of religion discussing, questioning and evaluating important issues in religion and philosophy, including ultimate questions and ethical issues.
- Reflecting on and carefully evaluating their own beliefs and values and those of others in response to their learning in religious education, using reasoned, balanced arguments.
- Using a range of forms of expression (such as art and design, music, dance, drama, writing, ICT) to communicate their ideas and responses creatively and thoughtfully.
- Exploring the connections between religious education and other subject areas such as the arts, humanities, literature and science.



Key Stage 3 – Buddhism Core Unit

What do Buddhists believe?	Where do Buddhists learn about their faith?	How do Buddhists express/demonstrate their faith, beliefs and spirituality?
<p>Four Noble Truths</p> <p>The wheel of life (karma, samsara, rebirth and nirvana)</p>	<p>Teachings of the Buddha (Buddha Dharma)</p> <p>Stories from Buddha’s life showing how he discovered how to overcome suffering and unhappiness and become ‘awakened’</p> <p>Pali Canon (Theravada) e.g. Metta Sutta (Discourse of Loving Kindness)</p>	<p>Daily worship and offering (puja)</p> <p>Going for Refuge</p> <p>Importance of quiet reflection.</p> <p>Meditation</p> <p>The Sangha (community):</p> <ul style="list-style-type: none"> • People practicing Buddhism in ordinary lives. • Monks and nuns
Ethics and relationships in Buddhism	Buddhists attitudes to rights and responsibilities/global Issues and Interfaith dialogue	Buddhist beliefs about religion and science
<p>Shila (discipline / ethics)</p> <p>Five Precepts</p>	<p>Tolerance of different forms within Buddhism and of other religions.</p>	<p>Buddhist cosmology and cyclical nature of existence</p>
<p>Key Questions</p> <ol style="list-style-type: none"> 1) In what ways does the lifestyle of a Buddhist reflect Buddhist beliefs? 2) Why do Buddhists meditate? 3) In what ways does the idea of loving kindness (metta/maitri) underpin Buddhist values and behaviour? 		



Key Stage 3 – Christianity Core Unit – The Bible

What do Christians believe?	Where do Christians learn about their faith?	How do Christians express/demonstrate their faith, beliefs and spirituality?
<p>Christians believe that The Bible is God’s word and is relevant to their lives today.</p> <p>Christians believe that God created the world that Jesus is the Son of God and that Jesus will come again.</p> <p>What is the Trinity?</p> <p>Christians believe that the full nature of God is revealed and expressed in the Trinity – Father, Son and Holy Spirit.</p>	<p>How Christians interpret the Bible in the 21st Century.</p> <p>How relevant do Christians believe the Old Testament is to them today?</p> <ul style="list-style-type: none"> • Old Testament: - e.g. History, Noah’s Ark, Tower of Babel. <p>What do Christians believe it means that Jesus is coming again?</p> <ul style="list-style-type: none"> • Life of Jesus – Son of God; • Second coming. 	<p>Christians express their faith by reading The Bible, applying its teaching to their lives and by being good stewards of the Earth’s resources.</p>
<p>Ethics and relationships in Christianity</p>	<p>Christian attitudes to rights and responsibilities, global issues and interfaith dialogue</p>	<p>Christian beliefs about religion and science</p>
<p>Christians believe The Bible shows them how to live in relationship with other Christians, other faiths, the community and the world they live in.</p>	<p>What the Bible teaches Christians about how they should approach topical global issues.</p> <p>What relationship is there between the Christian Bible and the sacred texts of other faiths?</p> <ul style="list-style-type: none"> • Islam, Judaism and Sikhism. 	<p>Does the Christian view of creation fit with the Big Bang Theory?</p> <p>Are religion and science compatible?</p>
<p>Key Questions</p> <ol style="list-style-type: none"> 1) How do Christians learn about their faith from The Bible? 2) What guides Christians from different traditions in how they interpret The Bible? 3) How does The Bible influence how Christians live their lives today? 4) How does The Bible link to the texts of other faiths? 		

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Key Stage 3 – Christianity Core Unit – Ethics

What do Christians believe?	Where do Christians learn about their faith?	How do Christians express/demonstrate their faith, beliefs and spirituality?
<p>God gives humans free will, but also guidelines to live by and shape the decisions that they make.</p>	<p>What informs and influences the way Christians make ethical decisions?</p> <p>Sources of authority for Christians to apply to their daily lives.</p> <ul style="list-style-type: none"> • 10 Commandments; • The Sermon on the Mount; • WWJD – “What Would Jesus Do?” 	<p>What does <i>true</i> forgiveness mean for Christians? e.g.</p> <ul style="list-style-type: none"> • Jimmy Mizen’s Family; • Neville Lawrence father of Stephen • “When faith gets shaken” stories.
<p>Ethics and relationships in Christianity</p>	<p>Christian attitudes to rights and responsibilities, global issues and interfaith dialogue</p>	<p>Christian beliefs about religion and science</p>
<p>Do Christians believe God forgives everyone, whatever they have done?</p> <ul style="list-style-type: none"> • Right and Wrong; • Goodness and evil; • Forgiveness and reconciliation. <p><i>(Use examples from the local area and the news.)</i></p> <p>Do Christians believe there is ever such a thing as a just war?</p> <ul style="list-style-type: none"> • Pacifism/Just Wars? 	<p>Was Nelson Mandela a freedom fighter or a terrorist?</p> <ul style="list-style-type: none"> • Other examples of Christians whose lives have been based on their interpretation of Christian ethics include Elizabeth Fry, Gladys Aylward, Dr Barnardo, Gee Veronica Walker, Martin Luther King, Mother Teresa • Justice and Equality. 	<p>Compatibility of ethical examples in science with Christian beliefs, e.g. organ donation.</p>
<p>Key Questions</p> <ol style="list-style-type: none"> 1) In what ways do the authority of Jesus and The Bible underpin Christian values and behaviour? 2) How do Christians from different traditions interpret The Bible for living in the 21st. Century? – Commonalities and differences. 3) How do Christians relate to members of other faiths and none? 4) How do Christians live out their faith in the world today? 		

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Key Stage 3 – Christianity Core Unit – Rituals of Life

What do Christians believe?	Where do Christians learn about their faith?	How do Christians express/demonstrate their faith, beliefs and spirituality?
<p>Christians believe that God sent His Son, Jesus Christ, who died for everyone and that each person has to make their own decision to follow Him. This is marked by and through rituals of life.</p>	<p>Christians learn about the rites of their faith by living in community with other Christians, observing and experiencing the rituals.</p>	<p>How Christians bring their faith into celebrating a new baby:</p> <ul style="list-style-type: none"> • Birth, naming, Christening, Baptism. <p>Why do many Christians read the Bible and pray every day?</p> <ul style="list-style-type: none"> • Personal prayer, Bible study, good works, acts of kindness. <p>Why people make personal decisions to be baptised and/or confirmed</p> <p>How Christians express their faith in marking the end of life</p> <ul style="list-style-type: none"> • Death, funerals, belief in everlasting life.
<p>Ethics and relationships in Christianity</p>	<p>Christian attitudes to rights and responsibilities, global issues and interfaith dialogue</p>	<p>Christian beliefs about religion and science</p>
<p>Christian views of sex and sexuality</p> <ul style="list-style-type: none"> • Similar and different Christian views and attitudes to marriage; and • Similar and different attitudes to sex and sexuality. 	<p>Christian beliefs about their responsibility to care for the elderly in their families and community</p> <ul style="list-style-type: none"> • Biblical examples and teachings 	<p>Body and Spirit</p> <ul style="list-style-type: none"> • Rituals of life and death, including burial, according to Christianity, • Similarities and differences of belief between faiths.
<p>Key Questions</p> <ol style="list-style-type: none"> 1) How do Christians mark significant points in their lives through their faith? 2) How does the Bible influence how Christians live their lives today? 3) How do Christians express their faith in their relationships with others? 4) How are some Christian beliefs and practices similar to those of other faiths? 		



Key Stage 3 – Christianity Core Unit – Worship

What do Christians believe?	Where do Christians learn about their faith?	How do Christians express/demonstrate their faith, beliefs and spirituality?
<p>Christians believe that God is worthy of worship and that they should live their lives in a way that worships God in everything that they do.</p>	<p>How the Bible influences the way Christians worship today.</p> <ul style="list-style-type: none"> • Use of The Bible in worship; • Source of the language and liturgy of worship. 	<p>Different styles of Christian worship:</p> <ul style="list-style-type: none"> • When and why Christians pray. • What Christians understand to be the purpose of prayer. <p>How do Christians use music, art and dance in worship?</p> <p>What is the significance of the design and use of buildings in some Christian worship?</p> <p>Why do Christians take part in the sacraments?</p> <ul style="list-style-type: none"> • Baptism, Communion, Confirmation, anointing of sick and the dying, etc.
<p>Ethics and relationships in Christianity</p>	<p>Christian attitudes to rights and responsibilities, global issues and interfaith dialogue</p>	<p>Christian beliefs about religion and science</p>
<p>Christians believe they should respect the worship traditions and beliefs of all other denominations and faiths.</p> <p>Awareness and understanding of similarities and differences in Christian worship across denominations.</p>	<p>Christian responses to the persecution of Christians because of their beliefs and worshipping practice.</p> <ul style="list-style-type: none"> • Terry Waite • Coptic Christians • Investigate current national and international examples from the news 	<p>Saints</p> <ul style="list-style-type: none"> • The importance of Saints in some Christian traditions. • Gregor Mendel and plant genetics.
<p>Key Questions</p> <ol style="list-style-type: none"> 1) What, when, how and why do Christians worship? 2) How does The Bible influence the way Christians worship today? 3) How do different Christian denominations relate to each other as members of the worldwide family of Christians (East and West)? 4) How are some Christian beliefs and practices similar to those of other faiths? 		

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Key Stage 3 – Hinduism Core Unit

What do Hindus believe?	Where do Hindus learn about their faith?	How do Hindus express/demonstrate their faith, beliefs and spirituality?
<p>Concept of God:</p> <ul style="list-style-type: none"> • Para Bram-mam – Supreme; • Shiva & Shakti; • Vishnu & Lakshmi; • Bram-maa & Sarasvati; and • Ganesh, Murugan, Hanuman. <p>Between Life & rebirth</p> <ul style="list-style-type: none"> • Karma: Cause and Effect of Actions; • Story of Dasharatha (Father of Rama) and Shravan from Ramayana; and • “Matha, Pitha, Guru, Deivam”- the importance of mother, father, teacher and god. 	<p>The Vedas Bhagavath Gita Puranas</p> <p>Festivals</p> <ul style="list-style-type: none"> • Holi • Ganesh Charthurthi <p>Stories</p> <ul style="list-style-type: none"> • Story of Narasimha 	<p>Meditation</p> <p>Dietary practice</p> <p>Yoga as a spiritual discipline</p> <p>Values demonstrated by Mahatma Gandhi</p>
<p>Ethics and relationships in Hinduism</p>	<p>Hindu attitudes to rights and responsibilities, global issues and interfaith dialogue</p>	<p>Hindu beliefs about religion and science</p>
<p>Non-Violence/Ahimsa: Refraining from violence.</p> <p>Charity of Food, Clothing, Water and Education</p>	<p>Equality of Women and Men</p> <p>Caring for family</p> <p>How Caste can be a support network and guidance not discrimination or segregation.</p>	<p>Vegan and Vegetarian</p> <p>Hindus believe the Rigveda and its scientific principles showed the existence of planets millennia before they were proved in the works of many famous scientists such as Newton, and Einstein</p>



Key Stage 3 – Hinduism Core Unit

Key Questions

- 1) Hindus believe that god is everywhere and in everything. How do Mahashivaratri and Narasimha emphasis this belief?
- 2) How do Hindus derive guidance from Bhagavat Gita to fulfil their responsibilities?
- 3) How has the caste support network (allocation/reservation) helped in improving lives with deprived Hindus in education and integration?
- 4) How does the story of Dasharatha (Father of Rama) and Shraavan show the impact of Dharma and Karma?
- 5) Why do you think it is important to see men and women as equal and how do the Hindu god and goddess Shiva and Shakthi contribute to this belief?
- 6) The Hindu diet varies according to the stages of life, how do Hindus feel this has an impact on spiritual thinking?
- 7) Why is Ganesh a very important god for Hindus?



Key Stage 3 – Hinduism Core Unit

Karma :- The Story of Dashratha (Father of Rama) and Shravan

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King Dashratha was the father of Rama. As a ruler, he always helped his people to grow and spread happiness in their lives. He had all the qualities of the best king possible and thus, his state's people loved him a lot.

Dashratha was a skilled archer. He could aim at his target just by listening to the sound coming in from a direction.

Shravan Kumar's parents were hermits/saints. Due to ageing they had become blind and unable to move. It is a typical Hindu belief that a pilgrimage to the various shrines and holy places, undertaken in old age, purifies the soul. At that time, transport was scarce and costly, and so Shravan Kumar decided to put his parents each in one basket and to tie each to an end of a bamboo pole, which he would carry on his shoulders while on their pilgrimage.

One day, young Prince Dashratha was hunting in the forest of Ayodhya, when he heard a sound near a lake. Hoping to hit an animal he unleashed an arrow. The sound of the gurgle in the water had attracted Dashratha's attention and he had aimed his arrow mistaking it to be a deer.

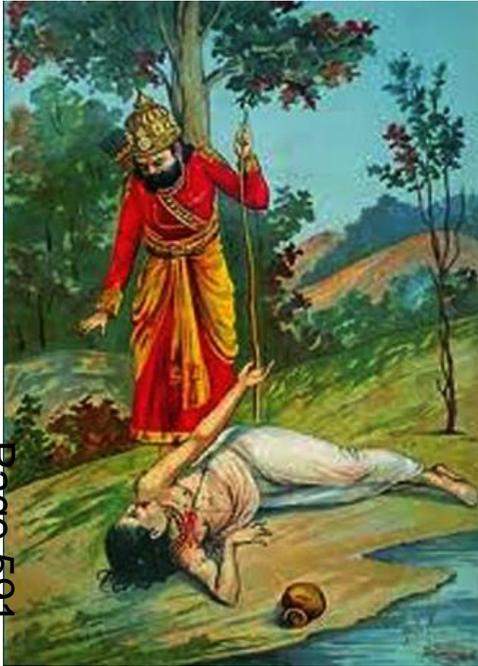
As soon as he shot the arrow, Dashratha could hear the cry of a human. Dashratha realised that the target hit by his arrow wasn't a deer but a man.

He rushed to the aid of his victim but by then Shravan was too badly injured. Before breathing his last, Shravan asked Dashratha to take the pitcher full of water for his parents.





Key Stage 3 – Hinduism Core Unit



When he reached out to Shraavan's parents, the Prince of Ayodhya, loaded with a sense of guilt, admitted to killing their son unintentionally. But the old couple, who had lost their only child forever, couldn't bear the loss and they cursed Dashratha by telling him that he would meet the same fate and yearn for his child one day.

"O king, you have killed our only son and the only support to our blind world, the way I am dying today in the remembrance of my son, in the same way, you too will die in the memories of you son."

This curse turned out to be reality when his son lord Rama went into the Jungle. The king died because he could not bear the separation from his son Rama who was sent away to the forest for 14 years.

Shraavan is revered as a dutiful son and is prayed to as a god because he is seen as an example of how one needs to take care of one's parents.



Key Stage 3 – Islam Core Unit

What do Muslims believe?	Where do Muslims learn about their faith?	How do Muslims express/demonstrate their faith, beliefs and spirituality?
<p>The key belief of Islam is: Tawhid – The Oneness of Allah. people attempt to comprehend Allah’s greatness through His attributes which are mentioned in the Quran surah 59:22:</p> <ul style="list-style-type: none"> • All Merciful – Ar Raheem who acts with extreme kindness • All Forgiving – Al Ghafoor who forgives over and over • The Guide – Al Haadi guides living beings to what is good for them • The Protecting Friend – Al Waliy who supports and protects living beings 	<p>Muslims learn about their faith from: The Quran – Allah’s final revelation as well as the previous revealed books The final prophet Muhammad (pbuh) as a perfect exemplar of Islamic behaviour – learned from the study of his Sunnah (actions and behaviour) and from his Hadith (accounts of what he said and did)</p>	<p>Faith in action: Many Islamic organisations work to help people in need all over the world Locally: Lewisham mosque provides food for the homeless, free counselling services and a supported funeral fund to help aid the costs of burial. Individually: Muslims will act upon hadith that even a smile is an act of charity</p>



Key Stage 3 – Islam Core Unit

Ethics and relationships in Islam	Muslim attitudes to rights and responsibilities, global issues and interfaith dialogue	Muslim beliefs about religion and science
<p>‘Muslims take guidance from Allah’s words in the Qur’an and the Sunnah of prophet Muhammad in all aspects of life and behaviour.</p> <ul style="list-style-type: none"> • children - good name, education, love and affection • women – refer to 10 hadith about women • orphans – protect them • elderly 	<p>Muslims understand their responsibility to care and respect the environment and the natural world.</p>	<p>Muslims believe Islam and science are not incompatible. Throughout the Qur’an Allah says that he has given “signs for people who think”. Muslims understand this as a duty to investigate and gain knowledge of His creation.</p> <ul style="list-style-type: none"> • barrier between the two seas -the seas not mixing with each other (Qur’an 55:19-20 & 25:53) • development of the foetus in the womb – the three dark stages of the baby in the womb (Qur’an 23:12-14)
<p>Key Questions</p> <ol style="list-style-type: none"> 1) How do Muslims demonstrate their faith through their relationships with other people? 2) How is the Qur’an important for Muslims? 3) How do Muslims take guidance from the life of the Prophet Muhammad (pbuh)? 		

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Resources for this unit on the next page



Key Stage 3 – Islam Core Unit

What do Muslims believe?	Where do Muslims learn about their faith?	How do Muslims express/demonstrate their faith, beliefs and spirituality?
<p>https://99namesofallah.name Quran ref: surah al Hashr verse number 22,23,24 Youtube: Asma al husna 99 names of Allah Recitation – www.ealimtech.com</p>	<p>https://www.sunnah.com/nawawi40 hadith no. 13, 37 and 7</p>	<p>https://www.islamic-relief.org.uk/ https://donate.humanappeal.org.uk/ https://muslimhands.org.uk/ http://www.lewishamislamiccentre.com/</p>
<p>Ethics and relationships in Islam</p>	<p>Muslim attitudes to rights and responsibilities, global issues and interfaith dialogue</p>	<p>Muslim beliefs about religion and science</p>
<p>Women - http://www.the-faith.com/featured/10-hadiths-about-women/ Orphans – Quran chapter 4 verse 10 Elderly – Quran chapter 17 verse 23-24 Children – Raising children in Islam muslim-character">www.iqrasense.com>muslim-character www.ilmaeducation.com</p>	<p>Quran: chapter 6 verse 167 10 green hadith video - http://aboutislam.net/shariah/hadith/hadith-collections/10-green-hadiths-video/ http://www.ifees.org.uk/</p>	<p>YouTube:</p> <ul style="list-style-type: none"> • the seas not mixing with each other Quran and modern science • amazing Quran miracle talk Islam <p>Quran on human embryonic development – www.scienceislam.com</p>



Key Stage 3 – Judaism Core Unit

What do Jews believe	Where do Jews learn about their faith?	How do Jews express/demonstrate their faith, beliefs and spirituality?
<ul style="list-style-type: none"> • The Shema • Interpretations of relationship with God and beliefs across branches of Judaism 	<p>The Talmud</p> <p>The Rabbi and rabbinic traditions</p>	<p>The Pilgrim Festivals Pesach (Passover); Shavuot (Feast of Weeks); Sukkot (Tabernacles).</p> <p>Support for the elderly and vulnerable</p>
Ethics and relationships in Judaism	Jewish attitudes to rights and responsibilities, global issues and interfaith dialogue	Jewish beliefs about religion and science
<p>Family Responsibilities</p> <p>Honouring parents</p> <p>Making a new family at marriage</p>	<p>The Holocaust and learning the lessons of the past</p> <p>Promised Land/Israel and significance of Jerusalem to Jews.</p> <p>The work of the CCJ</p>	<p>Stewardship</p> <p>Attitudes to medical advances, and spare part surgery</p>
<p>Key Questions</p> <ol style="list-style-type: none"> 1) What does the covenant mean to Jews? 2) What is the importance of the Pilgrim Festivals? 3) How do Jews promote learning the lessons of the Holocaust across the wider interfaith community? 4) How was the Holocaust allowed to happen? 		



Key Stage 3 – Sikhism Core Unit

What do Sikhs believe?	Where do Sikhs learn about their faith?	How do Sikhs express/demonstrate their faith, beliefs and spirituality?
<p>One God - Satnaam Waheguru, (eternal reality) and the Mool Mantar as an expression of the nature of God.</p>	<p>Rehat Nama as the main authority for living including external appearance and rules for day to day observations.</p> <p>Guru Granth Sahib has the philosophy of Sikh faith, their relationship to God and the core principles for Sikhs to live by.</p> <p>Janam Sakhi (the life story) has teachings of Guru Nanak including story of the rich man and the needle.</p>	<p>Daily prayers</p> <p>The Khalsa</p> <ul style="list-style-type: none"> • The birth of Khalsa and relationship to Hinduism. • The taking of Amrit • Keeping the 5 Ks
<p>Ethics and relationships in Sikhism</p>	<p>Sikh attitudes to rights and responsibilities, global issues and interfaith dialogue</p>	<p>Sikh beliefs about religion and science</p>
<p>Honest living</p> <p>Sharing food</p> <p>Equality and equal status for women</p>	<p>Freedom to practice one's faith.</p> <p>Human rights and social responsibility</p> <p>Opposition to forcible conversions.</p> <p>All faiths to be respected as of equal worth</p>	<p>Avoiding superstitions.</p>
<p>Key Questions</p> <p>1) In what ways does the lifestyle of a Sikh reflect Sikh beliefs?</p> <p>2) What does the idea of honest living involve?</p> <p>3) In what ways does the idea of the equality of all humans underpin Sikh values and behaviour?</p>		

Key Stage 3 Optional Units

Baha'i

Buddhism

Christianity

Creation and Origins

Hinduism

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Humanism

Islam

Judaism

Non-religious World Views

Other World Faiths

Philosophy and Ethics

Sikhism

Expanded unit example

– Creation and Origins

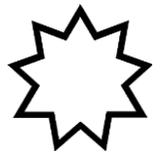




Key Stage 3 Baha'i Optional Unit

What do Bahá'ís believe?	Where do Bahá'ís learn about their Faith?	How do Bahá'ís express/demonstrate their faith, beliefs and spirituality?
<p>Progressive Revelation: all religion comes from one God. Different manifestations (Abraham, Krishna, Zoroaster, Moses, Buddha, Jesus Christ, Muhammad, the Báb and Bahá'u'lláh) came to bring a relevant message for humanity, according to humanity's capacity. Bahá'u'lláh is the manifestation of God for today.</p> <p>Unity of religion – unity of humanity: Civilization's advancement requires humanity to become united.</p> <p>Twin Manifestations: The Báb was the forerunner, who proclaimed that Bahá'u'lláh would arise in Persia.</p> <p>Abolishing extremes of wealth and poverty, equality of men and women, education as a universal right, integration of worship and service, spiritual development, centrality of justice to all endeavours.</p>	<p>Independent investigation of truth: Bahá'ís must investigate religious truth for themselves. They are encouraged to investigate all religions. To learn about the Bahá'í Faith, they can refer to Writings from the Báb, Bahá'u'lláh, <i>Abdu'l-Bahá</i> and <i>Shoghi Effendi</i>.</p> <p><i>There are no clergy in the Bahá'í Faith. No individual is considered to have more or lesser knowledge of the Faith.</i></p> <p><i>Kitáb-i-Aqdas</i> = <i>Book of Laws</i></p> <p><i>Universal House of Justice, National Spiritual Assemblies, Local Spiritual Assemblies - Institutions and Administrative bodies allow for systematic guidance across the Bahá'í world.</i> If Bahá'ís have doubts, they can turn to institutions for guidance.</p> <p>Administration/Covenant ensures no sects arise.</p>	<p>In most communities, friends come together every 19 days, to mark the 19 Day Feast.</p> <p>There are a number of Holy Days throughout the year, and Bahá'ís follow the Badí Calendar. Bahá'ís aged 15 years old and above fast for a period of 19 days, prior to the New Year/Naw Ruz.</p> <p>Bahá'ís are encouraged to let their deeds reflect their beliefs. They strive to be active protagonists of change in their communities and engage in acts of service.</p> <p>Bahá'ís, where possible, go to Haifa, Israel to the Bahá'í World Centre for Pilgrimage.</p> <p>Bahá'í Temples / Houses of Worship</p>
<p>Ethics and relationships in the Bahá'í faith</p>	<p>Bahá'í attitudes to rights and responsibilities, global issues and interfaith dialogue</p>	<p>Bahá'í beliefs about science and religion</p>

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Key Stage 3 Baha'i Optional Unit

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Bahá'ís are encouraged not to engage with **partisan politics**; Bahá'ís are permitted to vote but are warned against affiliating with any political party.

Bahá'ís strive to resolve conflicts using a method called **consultation**.

There are approximately 1,000 Bahá'ís in London, and there are Bahá'í communities in every borough in London.

Bahá'ís are involved in **core activities** all over the world (**children's classes, junior youth groups, study circles and devotionals**)

Bahá'ís are also involved in discourses in many levels of society. They are involved in **interfaith** activities throughout the world. They strive to raise awareness of the **persecution of Bahá'ís** in certain parts of the world.

The **Bahá'í International Community** have a consultative role within the **United Nations**. The **Bahá'í World Centre** located in Haifa, Israel, includes departments dedicated to research about Bahá'í involvement in global discourse, interfaith dialogue and social and economic development.

Harmony between science and religion is one of the central principles of the Bahá'í Faith.

Bahá'ís believe that religion, without science, can degenerate to fanaticism and superstition. Bahá'ís believe that science, without religion, becomes the instrument of crude materialism.

Bahá'ís believe that when harmonious, science and religion provide the impetus by which individuals, communities and institutions function and evolve.

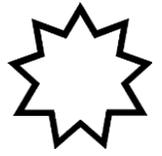
Key Questions

- What do Bahá'ís mean when they refer to the Twin Manifestations?
- What are some of the key features of the Revelation of Bahá'u'lláh?
- Explain what Bahá'ís believe about the relationship between science and religion.
- How does the Bahá'í Administrative Order maintain the principle of unity?

For further information, please see the following resources:

<http://www.bahai.org/> - Website of the world wide Bahá'í community

<http://www.bahai.org.uk/> - Website of the Bahá'í community in the United Kingdom



Key Stage 3 Baha'i Optional Unit

https://www.bahai-library.com/nakhjavani_ninth_cycle – Information on the *Badí* Calendar

<http://www.bahai.org/action/devotional-life/mashriqul-adhkar> - Information about Bahá'í Houses of Worship



Key Stage 3 – Buddhism Optional Unit

What do Buddhists believe?	Where do Buddhists learn about their faith?	How do Buddhists express/demonstrate their faith, beliefs and spirituality?
<p>The Three Marks of Existence</p> <ul style="list-style-type: none"> • Duhkha (suffering, unsatisfactoriness, anxiety, incompleteness) • Anitya (impermanence – everything changes) • Anatman (non-self and emptiness) <p>Arhat and Bodhisattva paths</p>	<p>Teachings of the Buddha (Buddha Dharma)</p> <p>Tripitaka (three baskets)</p> <p>Mahayana Sutras (Tibetan Kangyur) e.g. Heart Sutra (Discourse on Transcendent Wisdom)</p>	<p>Bodhisattva vow</p> <p>Meditation: Shamatha (calm abiding) and Vipasyana (insight) used to understand the deeper meaning of Buddha Dharma</p> <p>Pilgrimage</p> <p>Images of the Buddha & significance of the mudras (gestures)</p>
<p>Ethics and relationships in Buddhism</p>	<p>Buddhists attitudes to rights and responsibilities, global issues and interfaith dialogue</p>	<p>Buddhist beliefs about religion and science</p>
<p>The Four Boundless States:</p> <ul style="list-style-type: none"> • Loving kindness; • Compassion; • Joy; • Balance of mind 	<p>Peaceful protest and non-violence (e.g. Tibet)</p> <p>Dalai Lama as a living example of a Bodhisattva</p> <p>Buddhist rejection of caste.</p>	<p>Contemplative Buddhist psychology - mindfulness used for health and wellbeing</p> <p>Interaction between Buddhism and physics (e.g materiality as a dynamic space).</p>
<p>Key Questions</p> <p>1) What is the difference between the path of the Arhat and the way of the Bodhisattva?</p> <p>2) Why has Buddhism experienced less conflict with science than many other religions?</p>		



Key Stage 3 – Christianity Optional Unit

with links to the other units

What do Christians believe?	Where do Christians learn about their faith?	How do Christians express/demonstrate their faith, beliefs and spirituality?
<p>Core Christian beliefs from the Bible’s meta-narrative.</p> <p>Life everlasting.</p> <p>Differences in what Christians across the world believe. (<i>Links to core unit - The Bible</i>)</p> <ul style="list-style-type: none"> Western Belief and the Churches of the Eastern communion 	<p>The role of the ‘church leader’ in worship? (<i>Links to core unit - Christian Worship</i>)</p> <ul style="list-style-type: none"> Priests, pastors, worship leaders, etc. The role of the laity. 	<p>Why some Christians go on pilgrimages/retreats. (<i>Links to core unit - Rituals of Life.</i>)</p> <ul style="list-style-type: none"> Lourdes, Israel, Holy Land, Canterbury, Taizé, Iona, St. Alban’s, Camino de Santiago / Santiago de Compostela, Rome, Mount Athos, Georgia etc. Why are these places special to the Christian community?
<p>Ethics and relationships in Christianity</p>	<p>Christian attitudes to rights and responsibilities, global issues and interfaith dialogue</p>	<p>Christian beliefs about religion and science</p>
<p>Christian unity.</p> <p>Christian responses to other faiths.</p> <p>Local interdenominational and interfaith activities, e.g. responses to crises.</p>	<p>How do some Christians live out their faith when shopping? (<i>Links to core unit - Ethics</i>)</p> <ul style="list-style-type: none"> Fair Trade Recycling and upcycling Charitable gifts, e.g. sponsoring a child’s education in a Third World country. <p>Should Christians avoid single use plastic items? (<i>Links to core unit - Ethics.</i>)</p> <ul style="list-style-type: none"> Stewardship of the Earth and its resources 	<p>Compatibility – religion and science. (<i>Links to core unit - Ethics</i>)</p> <p>Can scientists be Christians? - How?</p>
<p>KEY QUESTIONS – see relevant statutory units.</p>		

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Key Stage 3 – Creation and Origins Optional Unit

Learning from and about the relationship between religion and science, especially Christianity, Hinduism, Islam and Humanism

What do people believe about creation and origins?	Where do Christians, Hindus, Muslims and Humanists learn about their faith?	How do Christians, Hindus, Muslims and Humanists express/demonstrate their faith, beliefs and spirituality?
<p>How have different people answered the questions humans have had over time about origins, meaning, purpose of the universe and human existence</p> <p>Can we know the truth and if we can, how?</p> <p>The world is very complex. Does this mean that it must have a creator God?</p> <p>Intelligent design</p>	<p>How do people account for their views about the origin of the universe?</p> <p>Sources of revelation / teachings / sacred texts, Creation stories</p> <p>Development of scientific theories and practice</p> <p>Philosophical arguments for the existence/ non-existence of God</p> <p>Diversity of belief within faith and belief traditions</p>	<p>How do beliefs about creation/ origins impact on how individuals of different faiths/ beliefs live their lives?</p>
Ethics and relationships	Attitudes to rights and responsibilities, global issues and interfaith dialogue	Beliefs about religion and science
<p>How do different views about the creation and origins of the universe impact our ethics, attitudes towards diversity and relationships with others?</p>	<p>Do humans have free will?</p> <p>Living alongside others understanding that knowledge is bounded in mystery and people have diverse truth claims.</p>	<p>Scientific theories about creation have changed over time.</p> <p>Creationists and evolutionists, advocates of intelligent design and philosophers of religion e.g. Anselm, Thomas Aquinas, Blaise Pascal and Francis Bacon</p> <p>There are a great many different creation stories and beliefs about the origins of the universe.</p>
<p>Key Questions:</p> <p>How do images of space inform or challenge beliefs?</p> <p>What is the relationship between Science and religion for believers?</p> <p>What do we mean by 'belief', 'knowledge', 'truth'?</p>		<p>Will humans ever know for sure how the universe came about?</p> <p>See also: https://understandinghumanism.org/</p>

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Key Stage 3 – Hinduism Optional Unit

What do Hindus believe?	Where do Hindus learn about their faith?	How do Hindus express/demonstrate their faith, beliefs and spirituality?
<p>Concept of God:</p> <ul style="list-style-type: none"> • Nature (Air, Fire, Water, Earth, Space) • Solar system – Sun, Moon and Planets <ul style="list-style-type: none"> ○ Navagraham – nine planets <p>Between Life & rebirth Ashramas & Moksha & fulfilling Dharma</p> <ul style="list-style-type: none"> • Brahmacharya (student life). • Grihastha (married life). • Vanaprastha (retired life). • Sannyasa (renounced life.) • Moksha (Relief from the cycle of birth and death) 	<ul style="list-style-type: none"> • 63 Nayanmars • Authors of scriptures Valmiki Thiruvalluvar / Tiruruval 	<ul style="list-style-type: none"> • Sainthood • Devotion towards the gods and towards family.
Ethics and relationships in Hinduism	Hindu attitudes to rights and responsibilities, global issues and interfaith dialogue	Hindu beliefs about religion and science
The importance of honesty and truthfulness.	Preservation of nature and animals	Astrology and Horoscopes Surya Namasakaram (Worship of the early morning sun)
<p>Key Questions</p> <ol style="list-style-type: none"> 1) What is detached attachment and when does a Hindu start following it? 2) Why do Astrology and Horoscopes play a vital role in Hinduism? 3) Hindu couples take an oath before the Fire during their wedding, what is the purpose of this aspect of the ceremony? 4) Why is Ganesh a very important god for Hindus? 		



Key Stage 3 – Humanism Optional Unit

What do humanists believe?	Where do humanists learn about their belief?	How do humanists express/demonstrate their belief?
<ul style="list-style-type: none"> • A non-religious worldview or approach to life • Atheism (not believing in a god) and agnosticism (believing we cannot know whether a god exists or not) • The one life we have; focus on the here and now • Without some external or 'ultimate' meaning to life, we can make our lives meaningful • Celebrating human capabilities: consciousness, reasoning, empathy, creativity, problem solving 	<ul style="list-style-type: none"> • Importance of freedom to choose one's own beliefs • The absence of scripture or authority, instead diverse sources of human wisdom (science, literature): 'The best that's been thought and said' • A work in progress, forward-looking • The existence and diversity of humanist thought throughout human history: ancient China (Mencius), India (Charvaka), and Greece (Epicurus, the Stoics), the Renaissance, the Enlightenment (Hume), 20th century (Russell) 	<ul style="list-style-type: none"> • Making the most of the one life we have • Personal autonomy: authors of our own lives • Human flourishing: 'The good life' – can be found through creativity, connections (with others, with the natural world, with a cause), flow (activities that enable us to get lost in the moment), awe and wonder (at the natural world, at human achievements), sensory pleasures (not to be avoided but enjoyed responsibly) • Celebration of human achievements: intellectual, technological, and creative/artistic • Humanist ceremonies: namings, weddings and funerals.



Key Stage 3 – Humanism Optional Unit

Ethics and relationships in humanism	Humanist attitudes to rights and responsibilities, global issues, and interfaith dialogue	Humanist beliefs about religion and science
<ul style="list-style-type: none"> • The origins of morality lie inside human beings: evolved naturally and culturally • Shared human values • Our capacity for reason and empathy • Consideration of the consequences • Accepting individual responsibility • The Golden Rule 	<ul style="list-style-type: none"> • Human responsibility for our own destiny • The importance of practical action; judging not what people say but what they do • Secularism: freedom of belief • Human rights and freedom of expression • Dialogue • Care for the natural world 	<ul style="list-style-type: none"> • Science, reason, and evidence • Scepticism, curiosity, and recognising the progressive nature of knowledge (wisdom comes through enquiry not authority) • The rejection of the supernatural and supernatural explanations for events • A scientific understanding of human beings as physical, mortal, and evolved beings
<p>Key Questions:</p> <ol style="list-style-type: none"> 1) Why do humanists believe in the importance of subjecting all beliefs to questioning? 2) How does the belief this is the one life we have affect the way humanists choose to live? 3) How do humanists believe we can make our lives meaningful? 4) Where do humanists think morality comes from? Can reason, empathy, and shared values help us decide how we should act? 5) How important is freedom of belief? <p>For teaching resources on all the above see understandinghumanism.org.uk and for support with planning see understandinghumanism.org.uk/planning-guidelines</p>		



Key Stage 3 – Islam Optional Unit

What do Muslims believe?	Where do Muslims learn about their faith?	How do Muslims express/ demonstrate their faith, beliefs and spirituality?
<p>The key belief of Islam is Tawhid – The Oneness of Allah, who has no partners Surah 112. People try to comprehend Allah through his attributes:</p> <ul style="list-style-type: none"> • The Omnipotent – Al Jabbar nothing happens except what He wills • The Omniscient – Al Aalim nothing is missing from his knowledge • The Omnipresent – Al Qayyoom who remains and does not end 	<p>Allah gave people guidance throughout time this is in the form of messengers and revealed books. (Qur’an surah 5:46 & 3:3-4)</p> <p>The line of prophets is from Adam the first man to the final prophet Muhammad (peace be upon him) (Qur’an surah 2:136)</p> <p>Muslims take their authority from the Qur’an which they believe is continuously relevant from the time of its revelation till the end of time.</p>	<p>Hajj – is an important aspect of Islamic faith and practise. It is obligatory upon all those who have the ability and means to perform it. It commemorates aspects of the lives of prophets Muhammad and Ibrahim.</p> <ul style="list-style-type: none"> • It is an international journey • The impact of hajj at a personal level
<p>Ethics and relationships in Islam</p>	<p>Muslim attitudes to rights and responsibilities, global issues and interfaith dialogue</p>	<p>Muslim beliefs about religion and science</p>
<p>Muslims learn about how to conduct business and trade fairly and honestly from the Qur’an and hadith and not charge interest on loans. (Qur’an 2:275)</p> <p>Transactions must obey the rules of equity and justice and be fully understood by those involved.</p> <p>Zakaah – a wealth tax which is obligatory upon Muslims for the benefit of the ummah (worldwide Muslim community)</p>	<p>The remarkable Hajj stories of:</p> <ul style="list-style-type: none"> • Mansa Musa – Sultan of Mali took thousands of his people to hajj with him 1324 • Zubaidah – wife of Harun Rashid who financed and planned the pilgrimage from Baghdad to Makkah to make the journey easier for pilgrims • Ibn Batuta – the greatest Muslim traveller who visited over 40 countries studied with religious teachers and completed the hajj four times before returning to write a famous book about his travels. 	<ul style="list-style-type: none"> • Muslims follow a Lunar calendar • They must also be aware of the position of the sun for their prayer times • Muslims should know the Qiblah (direction of Makkah) from wherever they are in the world • The study of astronomy became a vital part of Islamic scientific knowledge
<p>Key Questions</p> <ol style="list-style-type: none"> 1) In what ways does the lifestyle of a Muslim reflect Islamic beliefs? 2) How is the Qur’an important for Muslims? 3) How do Muslims take guidance from the life of the Prophet Muhammad (pbuh)? 		

Resources for this unit on the next page



Key Stage 3 – Islam Optional Unit

What do Muslims believe?	Where do Muslims learn about their faith?	How do Muslims express/ demonstrate their faith, beliefs and spirituality?
<p>www.99namesofallah.name – recitation of the names with translation</p>	<p>See Quran quotes in the unit</p>	<p>Youtube:</p> <ul style="list-style-type: none"> • World’s largest pilgrimage – Hajj documentary • NFL players go on hajj (NBC news – Rock centre) • Malcolm X explains his pilgrimage to Mecca 1964 • Malcolm X his letter from Mecca
<p>Ethics and relationships in Islam</p>	<p>Muslim attitudes to rights and responsibilities, global issues and interfaith dialogue</p>	<p>Muslim beliefs about religion and science</p>
<p>The value of trade by Quran – www.123muslim.com</p> <p>What is zakat and why should Muslims pay it? – www.humanappeal.org.uk</p>	<p>Wikipedia.</p> <p>The life of Mansa Musa the richest person in history – www.uk.businessinsider.com</p> <p>Meet Mansa Musa the richest person of all time – www.allthatisinteresting.com</p> <p>Zubaidah – addicted to Ramadan: Ramadan challenge day 5: Zubaidah bint Jaafar bal Mansur – www.addictedtoramadan.blogspot.co.uk</p> <p>Ibn Batuta – Muslim heritage – www.muslimheritage.com</p> <p>Youtube – Ibn Batuta: the greatest traveller in history</p>	<p>Islamic astronomy – www.explorables.com</p> <p>Muslim astronomers in the Islamic golden age – electrum magazine – www.electrummagazine.com>2012/11</p> <p>Youtube – science in golden age – Astronomy the science of the stars</p>



Key Stage 3 – Judaism Optional Unit

What do Jews Believe	Where do Jews learn about their faith?	How do Jews express/ demonstrate their faith, beliefs and spirituality?
<ul style="list-style-type: none"> • The Shema • Interpretations of relationship with God and beliefs across branches of Judaism 	<p>The Talmud</p> <p>The Rabbi and rabbinic traditions</p>	<p>The Pilgrim Festivals Pesach (Passover); Shavuot (Feast of Weeks); Sukkot (Tabernacles).</p> <p>Support for the elderly and vulnerable</p>
<p>Ethics and Relationships in Judaism</p>	<p>Jewish attitudes to rights and responsibilities, global issues and interfaith dialogue</p>	<p>Jewish beliefs about religion and science</p>
<p>Family Responsibilities</p> <p>Honouring parents</p> <p>Making a new family at marriage</p>	<p>The Holocaust and learning the lessons of the past</p> <p>Promised Land/Israel and significance of Jerusalem to Jews.</p> <p>The work of the CCJ</p>	<p>Stewardship</p> <p>Attitudes to medical advances, and transplant surgery</p>
<p>KEY QUESTIONS</p> <p>1) What does the covenant mean to Jews?</p> <p>2) What is the importance of the Pilgrim Festivals?</p> <p>3) How do Jews promote learning the lessons of the Holocaust across the wider interfaith community?</p>		



Key Stage 3 – Non-Religious World Views Optional Unit

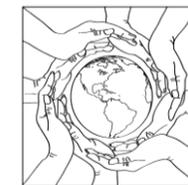
What do the non-religious believe?	Where do the non-religious learn about their beliefs?	How do the non-religious express/demonstrate their beliefs?
<ul style="list-style-type: none"> • Positive beliefs: the non-religious don't see themselves defined by what they don't believe in • Examples of non-religious worldviews: E.g. Humanism, Existentialism, Stoicism • Atheism and agnosticism • Variety of beliefs and answers to big questions • Areas of consensus • The complex picture of religion and belief: diversity within (as well as between) both religions and non-religious worldviews 	<ul style="list-style-type: none"> • Growing up without religion or finding reasons for leaving the religion one has grown up with • Learning from parents, teachers, community • Taking wisdom from a variety of sources: philosophers, scientists, writers – 'the best that's been thought and said' • Freedom to choose and change one's own beliefs 	<ul style="list-style-type: none"> • Variety of expression: charity work, celebration and ceremonies (Humanist ceremonies), campaigning work for freedom of belief and expression, community • Living a fulfilling life: the belief that there is nothing 'missing' from the non-religious life • Different ways of finding meaning and value in life: e.g. relationships with other humans and the natural world; personal, social and global goals; creativity • Non-religious spirituality • Similarities and differences to religious ways of life

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Key Stage 3 – Non-Religious World Views Optional Unit

Ethics and relationships in non-religious worldviews	Non-religious attitudes to rights and responsibilities, global issues, and interfaith dialogue	Non-religious beliefs about religion and science
<ul style="list-style-type: none"> • Morality's independence from religion • Shared human values as a foundation for morality • Variety of philosophical theories: utilitarianism, Kantian ethics (deontology), Virtue ethics 	<ul style="list-style-type: none"> • Non-religious origins of human rights • Secularism: freedom of religion and belief and freedom to be non-religious • Dialogue: between the religious and non-religious • Persecution of the non-religious around the world (see International Humanist and Ethical Union) 	<ul style="list-style-type: none"> • The impact of human scientific understanding on the decision to be non-religious (Charles Darwin) • Beliefs about the supernatural (afterlife, karma, alternative medicine): some reject, some embrace • Different attitudes towards religion
<p>Key Questions</p> <ol style="list-style-type: none"> 1) What does it mean to be non-religious? 2) What diversity is there amongst the non-religious, and where is there much consensus? 3) What are the main differences between being religious and non-religious? 4) Where can one find similarities in their approaches to life? 5) Does a non-religious life lack anything important or not? 6) Why might people decide to be non-religious? <p>Key Vocabulary</p> <p>Atheism, agnosticism, humanism, diversity, freedom, spirituality, shared human values, utilitarianism, deontology, secularism, human rights, dialogue</p>		



Key Stage 3 – Other World Faiths Optional Unit

In groups or as individuals students should research the following areas in relation to one or more of the following: Baha’i, Zoroastrianism, Jainism, Paganism, Alevism.

What do they believe?	Where do they learn about their faith?	How do followers express/demonstrate their faith, beliefs and spirituality?
Beliefs about God / the numinous Origins of the belief system historically and geographically Does this faith have links to any others?	What are the ‘sources of authority’ in this faith system? How are the teachings interpreted for modern life?	How are beliefs demonstrated in personal and corporate worship and daily life? How do symbolic actions (e.g. in regular worship, life events such as marriage and pilgrimage) figure in this belief system?
Ethics and relationships in this faith system	Members’ attitudes to rights and responsibilities, global issues and interfaith dialogue	Faith beliefs about religion and science
How do religious beliefs and teachings in this faith impact on relationships with other believers or members of other belief systems? Attitudes to technology, crime and punishment, war and peace, living in a pluralist society.	Faith attitudes to: Freedom to practice one’s faith. Human rights and social responsibility Conversion. Teachings and practices about other faiths and beliefs in terms of respect, worth and value. e.g. connection to Fundamental British Values	Teachings and practices related to creation, the universe and stewardship. Attitudes and teachings about medical ethics.
Key Questions 1) In what ways does the lifestyle of an adherent reflect their beliefs? 2) What does this faith teach about a good life? 3) In what ways do faith teachings underpin values and behaviour?		



Key Stage 3 – Philosophy and Ethics Optional Unit

Beliefs	Learning about faith	Expressions of faith and belief
<p>Where do beliefs come from?</p> <p>What is the difference between belief and knowledge? e.g. Plato, Socrates</p> <p>What could cause you to change your beliefs?</p>	<p>What is meant by ‘a leap of faith’?</p> <p>What is the difference between faith and belief? e.g. Argument for the existence of God – Descartes</p>	<p>How do expressions of faith and belief impact on others? e.g. connection to Fundamental British Values</p>
Ethics and relationships	Attitudes to rights and responsibilities/ global issues and interfaith dialogue	Beliefs about religion and science
<p>How do religious beliefs impact relationships?</p> <p>Where do your ethics come from?</p> <p>How do your ethics impact your relationships? e.g. connection to PSHE curriculum</p>	<p>How do religious beliefs impact history, politics and society? e.g. J S Mill Utilitarianism</p> <p>Should a political party have a religious affiliation? e.g. Irish politics</p>	<p>What is the difference between religion and science? e.g. creation stories and evolution</p> <p>What is ‘truth’? e.g. Schrodinger’s cat</p>



Key Stage 3 – Sikhism Optional Unit

What do Sikhs believe?	Where do Sikhs learn about their faith?	How do Sikhs express/ demonstrate their faith, beliefs and spirituality?
Beliefs about life and death: <ul style="list-style-type: none"> • Birth and death at the command of God • Reincarnation and achievement of nirvana through prayer and good deeds. 	The values of Sikhism as expressed through the lives and teachings of the ten Gurus.	Worship in the Gurdwara and the home Pilgrimage to the Golden Temple and other historic Gurdwaras. Melas (especially Baisakhi) Rites of passage
Ethics and relationships in Sikhism	Sikh attitudes to rights and responsibilities, global issues and interfaith dialogue	Sikh beliefs about religion and science
Family responsibilities	Historical and on-going relationship between Sikhism and Hinduism	Creation Stewardship
Key Questions <ol style="list-style-type: none"> 1) In what ways does the lifestyle of a Sikh reflect Sikh beliefs? 2) What, where and how, do Sikhs worship? 3) In what ways are the relationships between Sikhism and Hinduism similar to / different from the relationships between Judaism and Christianity? 		



Creation and Origins

Learning from religion and science: Christianity, Hinduism, Islam and Humanism

About the unit

This unit focuses on creation and origins of the universe and human life and the relationship between religion and science. It aims to deepen pupils' awareness of ultimate questions through argument, discussion, debate and reflection and enable them to learn from a variety of ideas of religious traditions and other worldviews. It specifically explores Christianity, Hinduism and Islam and also considers the perspective of those who do not believe there is a god (humanists and atheists). It considers beliefs and concepts related to authority, religion and science as well as expressions of spirituality. Pupils have opportunities to discuss, question and evaluate important issues in religion and science. They also have opportunities to reflect on and evaluate their own beliefs and values, and the beliefs and values of others, in relation to questions of truth and purpose.

This unit can be adapted for other religions and beliefs - using responses from other religious traditions to the key questions, including accounts from scientists who are members of that religious tradition and sources of authority such as sacred texts. This unit suggests work on four perspectives – probably more than enough for most pupils - but you might consider introducing the viewpoint of agnosticism (a principled and argued 'don't know' stance), which could also be useful.

The unit should take six to seven hours.

Prior learning

It is helpful if pupils have been encouraged to think about religion and science and the relationship between them, for example as portrayed in the media.

Future learning

Pupils could go on to:

- investigate and role-play particular disputes between religion and science, e.g. Galileo, Darwin and Dawkins, and particular meeting points between science and religion, e.g. Einstein, Teilhard de Chardin;
- explore and write about attitudes to science and religion in Islamic and other cultures;
- study a GCSE unit on an aspect of religion and philosophy.

Where the unit fits in

This unit could build on what pupils might have already learnt about creation stories from sacred texts.



Creation and Origins

Attitudes and Fundamental British Values in the unit

This unit helps pupils develop:

Self-awareness

- Feeling confident about their own beliefs and identity and sharing them with others without fear of embarrassment or ridicule, e.g. articulating and reflecting critically on their own religious, philosophical and moral beliefs about science and religion.

Respect for all

- Being prepared to recognise and acknowledge their own bias, e.g. when discussing religious and other views of the world.

Open-mindedness

- Distinguishing between opinions, viewpoints and beliefs in connection with issues of conviction and faith, e.g. in relation to questions about creation and origins.

Appreciation and wonder

- Recognising that knowledge is bounded by mystery, e.g. in relation to the origin of the universe and of human beings.

Vocabulary

In this unit pupils have an opportunity to use words and phrases related to:

- religion in general, e.g. creation, God as creator of the universe, intelligent design, sacred story, purposeful design;
- a religion specifically, e.g. Bible, Rig Veda, Qur'an;
- religious and human experience, e.g. agnostic, atheist, Big Bang, cause, controversy, evidence, evolution, literal interpretation, meaning, myth, origins, partnership, probability, proof, purpose, revelation, truth.



Creation and Origins

Theme1: Can we know the truth? If we can, then how?

Learning objectives	A T 1	A T 2	Teaching and Learning	Learning outcomes	Points to note
<p>Pupils should:</p> <ul style="list-style-type: none"> know that people use the terms 'know' and 'true' in different ways; understand that people have always had questions about the origins, meaning and purpose of the universe and human existence; reflect on their own and others' questions about truth when viewing images of the universe. 		<p>✓</p>	<p>Ask pupils to write any sentence with the phrase 'I know' in it, e.g. 'I know that England will win the World Cup'. Then ask them to swap sentences with their neighbour and replace 'know' with another verb, e.g. 'I hope that England will win the World Cup.'</p> <p>Together as a class make a list of different meanings of 'know': knowledge as certainty, as hope, as belief, as personal encounter, etc, illustrating with examples from the paired activity. Through discussion, analyse how scientists and religious people use the expression 'I know', e.g. 'I know the universe started with a big bang', when often they mean 'I have a theory' or 'I believe'.</p> <p>What did people really mean when they said 'I know'? Explain that, when scientists make a scientific assertion they usually mean, 'the best explanation given the evidence is that "X" is true'.</p> <p>This is one reason why scientific theories change over time. Explain that, for religious people, there is often a source of truth that comes from revelation, or from the teachings of those who claim their insight comes from the attainment of higher states of consciousness, perhaps through a religious experience, prayer or meditation.</p> <p><i>Continued on next page.</i></p>	<p>Pupils:</p> <ul style="list-style-type: none"> suggest how people use the terms 'know' and 'true'; suggest comments and questions raised by the images for the content of a website, exploring questions about meaning, purpose, origins and destiny; reflect on their own understanding of 'truth'. 	<p>Link to Science curriculum: Consider inter- departmental teaching, enabling pupils to benefit from interdisciplinary expertise.</p> <p>ICT: There are many web-based resources about the 'wonders of the universe' and firsthand accounts of different perspectives on religious and science questions. Pupils should use and develop ICT skills, particularly in interpreting information from the web. They should weigh the ways in which people's perspectives can impact on interpretation and on their presentation. Pupils can exchange and share information in ways appropriate to the task, refining and presenting information, ideas and questions through well-chosen media.</p> <p><i>Continued on next page.</i></p>



Creation and Origins

Theme 1: Can we know the truth? If we can, then how? cont'd

Learning objectives	A T 1	A T 2	Teaching and Learning	Learning outcomes	Points to note
Page 618	□	□	<p><i>Continued from previous page.</i></p> <p>How do we identify beliefs typical of different groups of people? Give each pair of pupils some statements that scientists, religious and non-religious people might hold. Ask them to decide which groups of people made each statement and explain their choices to their partners. Do any statements fit in more than one category? What does this tell them? Lead pupils in a class discussion about which statements they believe to be true and why.</p>		<p><i>Continued from previous page.</i></p> <p>Links to key aims and values of the curriculum: this unit is about the pursuit of truth and mutual understanding.</p>
	□	□	<p>Looking at the universe: What do we see? Examine images of space from a website; ask pupils to respond to some of the images. Encourage them to describe what they see and how they feel about the images, including those who want to describe the universe as beautiful and those for whom it generates feeling of appreciation and wonder and even surprise. Ask pupils to speculate about what Christians, Hindus, Muslims or humanists might say about the images.</p>		
		□	<p>Ask pupils to compose a statement about what they 'know' is 'true' about the universe. Then ask them to swap statements and ask if they can 'know' that it is 'true?' Ask pupils to design a series of web pages for a website that aims to explore spiritual questions (about meaning and purpose, origins and destiny). They should choose two or more images and suggest comments and questions raised by each image which would form part of the design.</p>		



Creation and Origins

Theme 2: Does a complexly functioning world imply a creator God?

Learning objectives	A T 1	A T 2	Teaching and Learning	Learning outcomes	Points to note
<p>Pupils should:</p> <ul style="list-style-type: none"> know that, for many people, contemplation of the universe raises important questions about its origin and purpose; reflect on the extent to which the existence of the universe provokes the question of the existence of a creator God. 	<p>☐</p> <p>☐</p> <p>☐</p> <p>☐</p>	<p>☐</p>	<p>What questions does the existence of the universe and human beings raise for us? Ask pupils to work in groups, looking at some examples / images of the complexity in the universe, and of the humanity. Ask them to record their group’s questions about the origins and purposes of human existence raised by these examples. Then, lead a class discussion about the questions the pupils identify, or ask the pupils to give presentations about them. Display pupils’ questions as reference points through the rest of the lesson.</p> <p>To what extent does a world that functions in a very complex way imply a creator God? In pairs or small groups, make some initial responses to this key question. Responses should be imaginative and should begin to argue their case.</p> <p>Ask pupils to share their initial thoughts, asking them to think carefully about the points they contribute. Introduce pupils to the ways in which Christians, Hindus, Muslims and atheists might answer this question, if such views have not already been expressed by the pupils themselves.</p> <p>Ask the pupils to write a response to the following question: The world is very complex. Does this mean that it must have been the work of a creator God?</p> <p>Pupils should show that they have thought about more than just their own, initial response. You might wish to make use of a pre-prepared bank of statements or a writing frame to help the pupils plan their responses.</p>	<p>Pupils:</p> <ul style="list-style-type: none"> Investigate what ultimate questions are raised for people when looking at the universe; suggest what meaning might be drawn from various responses to: To what extent does a world that functions in a very complex way imply a creator God? reflect on the beliefs and feelings of others in their responses to: Does the world imply God? 	<p>The groups’ questions about the origins and purposes of human existence will need duplicating for the assessment task in Theme 6.</p> <p>Suggest to the pupils that their responses contain the phrase ‘I believe this because...’.</p>

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Creation and Origins

Theme 3: How do people account for their views about the origin of the universe?

Learning objectives	A T 1	A T 2	Teaching and Learning	Learning outcomes	Points to note
<p>Pupils should:</p> <ul style="list-style-type: none"> know Christian and Islamic accounts of creation; know the ways in which Hindus think about the origin of the world; know the ways in which atheists think about the origin of the world; understand the significance of accounts of creation for many believers; reflect on the question: Why are we here?, from what they have learnt. 	<p>□</p>	<p>□</p>	<p>What accounts of origins are found in the sacred texts of Christians and Muslims? What do Hindu sacred texts say about the origins of the universe? Ask the pupils to consult different creation stories and to complete a tick chart that helps them to note similarities and differences between the accounts of the origins of the universe found in the Christian Bible (e.g. Genesis:1-3), Hindu scriptures (e.g. Rig Veda X 129) and the Qur'an (e.g. in Surah 25:59, 7:54-56, 21:30-33). Consider presenting versions of these stories in a variety of media, e.g. CD-ROMs, children's books, original texts or web based versions. Ask the pupils to consider why the stories are so important to people in religious traditions and analyse what they understand to be the significance of these accounts to believers.</p> <p>What accounts of the origins of the universe do atheists hold? Ask the pupils to create a mind-map of what they already know about evolution and the Big Bang Theory as individuals, in pairs or as a whole class.</p> <p><i>Continued on next page.</i></p>	<p>Pupils:</p> <ul style="list-style-type: none"> Investigate different creation accounts; interpret what these accounts mean for believers; analyse how believers' understanding about the origins of the world might affect their other attitudes and beliefs; evaluate answers to the questions: Where do we come from? Why are we here? found within Christian, Hindu, Muslim and atheist thinking. 	<p>For the continuum discussion, organise the class so that they are seated in circles of six with empty floor space or two tables between them. Give each group a set of cards containing statements about the origins and possible purposes of life. In the middle of the floor place two cards some distance apart, with one reading 'I totally agree with this statement' and the other 'I totally disagree with this statement'. Explain to the pupils that these cards represent a continuum that ranges from totally agree to totally disagree. The pupils should take it in turns to read out the statement on their card, say how they feel about that statement and then place the card somewhere in the continuum where they feel it belongs. When everyone has placed the card somewhere in the continuum, discussion is opened for others to express their opinions on the placements of various cards. After listening to the views and opinions of the other pupils, explain that they each now have the opportunity to move the card from where they placed it to another place in the continuum, if they so wish.</p> <p><i>Continued on next page.</i></p>



Creation and Origins

Theme 3: How do people account for their views about the origin of the universe?

Learning objectives	A T 1	A T 2	Teaching and Learning	Learning outcomes	Points to note
<p>Page 621</p>	<p>□</p> <p>□</p>	<p>□</p> <p>□</p>	<p><i>Continued from previous page.</i></p> <p>Why is it that not all atheists believe in the ‘big bang’ and not all theists believe in the Biblical or Qur’anic accounts of God’s creation of the world? After the pupils have shared their knowledge, give an overview of both the evolution and big bang theories through a PowerPoint presentation.</p> <p>What do people say about questions of origins? Organise a ‘continuum discussion’ (see ‘Points to note’), in which the pupils evaluate some arguments for and against propositions such as: the universe began with an accident, and doesn’t have a purpose; humans are more like apes than angels; God is the creator of the world; love is the meaning of creation; if you don’t know where you came from, it is hard to know who you are; the meanings of human life can be found through thinking about sacred texts in scriptures; God is the power at work in the design of evolution; disagreement about the origins and purposes of life on earth are common.</p>		<p><i>Continued from previous page.</i></p> <p>Literacy: pupils should explain texts imaginatively and thoughtfully and develop their understanding of the contested status of texts in science and religion. Developing the key skills involved in understanding the function of religious texts within religious traditions are important learning outcomes for RE teaching.</p> <p>Be aware that Christians approach the creation accounts in various ways, all of which see the world as a gift of God’s creativity.</p> <p>Be aware that Islamic teaching about God sees him as a creator without partners.</p> <p>Be aware that Hindus interpret their creation accounts in various ways.</p> <p>Be aware that humanists do not believe in a transcendent meaning or purpose to life and respond to accounts of origins in various ways.</p>



Creation and Origins

Theme 4: What do people believe about the origins of the universe and human existence?

Learning objectives	A T 1	A T 2	Teaching and Learning	Learning outcomes	Points to note
<p>Pupils should:</p> <ul style="list-style-type: none"> know how people express a range of beliefs about whether the universe shows signs of having been designed; understand a range of responses to questions of origin and purpose; reflect on the strengths and weaknesses of a range of contrasting viewpoints. 	<p>□</p>	<p>□</p>	<p>Is the universe designed? Who could have designed it?</p> <p>Give the pupils opportunities to explore, through a website, DVD or written text (see Resources), a range of different answers to these questions, including answers given by members of different faiths. These answers should include the views of creationists, evolutionists, advocates of intelligent design and philosophers of religion, such as Anselm, Thomas Aquinas, Blaise Pascal and Francis Bacon.</p> <p>Ask the pupils to analyse these views, considering the question of truth, the strengths and weaknesses of the arguments including the evidence that supports them. Give the pupils time to develop and discuss their own ideas in relation to those they have discovered in the lesson.</p> <p>What is a human being: result of natural selection, child of God or mystery?</p> <p>Ask the pupils to complete a table of responses to: What is a human being?</p> <p>Ask the pupils to work in pairs to discuss their thoughts on the three alternatives presented above, and then work in larger groups, or as a class, to share their thoughts and reflections, taking note of good points made by other pupils that could enhance their own thinking.</p> <p><i>Continued on next page.</i></p>	<p>Pupils:</p> <ul style="list-style-type: none"> explain the concepts of creation, intelligent design and evolution, showing the ability to identify key elements of religious and secular thinking; compare and contrast different answers to questions about the origin of the universe and the purpose of human existence; evaluate the strengths and weaknesses of a range of contrasting viewpoints. 	<p>Pupils should understand the terms used in discussions of the origin and purpose of the universe and human existence. High-achieving pupils can research debates around creationism and intelligent design themselves. They should make use of published materials that seek to offer support in the teaching of science and religion at Key Stages 3 and 4, especially those that set out many of these views for classroom use.</p> <p>When evaluating contrasting viewpoints, encourage the pupils to recognise that positions held as a matter of faith, or as trust in the veracity of revealed scripture, should not be dismissed simply because they appear not to meet the criteria of rationality.</p> <p><i>Continued on next page.</i></p>



Creation and Origins

Theme 4: What do people believe about the origins of the universe and human existence?

Learning objectives	A T 1	A T 2	Teaching and Learning	Learning outcomes	Points to note
<p style="writing-mode: vertical-rl; transform: rotate(180deg);">Page 623</p>	<p>□</p>	<p>□</p>	<p><i>Continued from previous page.</i></p> <p>To help pupils plan their responses, a table might include columns entitled:</p> <ul style="list-style-type: none"> • Arguments and evidence for this view • Arguments and evidence against this view • My view of the strength and weaknesses of these arguments <p>Rows titled:</p> <ul style="list-style-type: none"> • Result of natural selection? • Child of God? • Mystery? <p>For homework: the pupils should use their table of notes to create an argument from the three points of view – result of natural selection, child of God and mystery – between different viewpoints, including their own, under the title ‘Human being: result of natural selection, child of God or mystery?’ In their answer they should remember to show an understanding of the question ‘What does it mean to be human?’; show they understand three different views of human origins, explain why each of the views is attractive to some people and express their own reflections and views.</p> <p>Ask the pupils to refer to ‘sources of authority’ from Christians, Hindus, Muslims and/or atheists.</p>		<p><i>Continued from previous page.</i></p> <p>Be aware that Francis Bacon said ‘A little philosophy inclineth man’s mind to atheism, but depth in philosophy bringeth men’s minds about to religion. . .’</p>



Creation and Origins

Theme 5: What is the relationship between religion and science for believers?

Learning objectives	A T 1	A T 2	Teaching and Learning	Learning outcomes	Points to note
<p>Pupils should:</p> <ul style="list-style-type: none"> know that there is a variety of perspectives on the relationship between religion and science within each of the religious and philosophical traditions they have considered; understand how their own world view can affect their understanding of information; reflect on one issue that religion and science tend to approach in different ways. 	<p>☐</p> <p>☐</p> <p>☐</p> <p>☐</p> <p>☐</p>	<p>☐</p> <p>☐</p> <p>☐</p> <p>☐</p>	<p>What do scientists say about religion? Watch a DVD or video extract (see Resources) that allows the pupils to encounter the views of scientists from various fields who are Christian, Hindu, Muslim or atheist. While watching the DVD or video pupils should note the diverse views expressed about questions of origins of the universe and of human existence held within the scientific community.</p> <p>Is it surprising to find people who have a religious belief who are scientists? Lead the pupils in a class discussion, asking the pupils to reflect on what their responses tell others about their own 'world views'. Raise issues of truth and knowledge for the pupils to think through again. Ask them to consider how they view the relationship between religion and science, and why they think that way.</p> <p>What do Christians, Hindus, Muslims and atheists say about topical issues in science? Using a recent newspaper, examine a news article concerning a scientific topic. Display a copy of the news article on an interactive whiteboard and ask the pupils to identify, by highlighting on the board, any religious and/or moral questions or problems raised by the article.</p> <p>Ask pupils to match ideas from religious sources, such as extracts from sacred texts including creation accounts studied in Theme 1, to the scientific, religious and moral questions or problems raised by the article. Ask them to annotate their own copy of the text to identify the matched ideas and to consider the different ways in which science and religion might interact or come into conflict. News articles might be about pictures from space, discoveries about genetics and the relationship between humans and the great apes.</p> <p>Encourage pupils to see that, for many religious people, core beliefs and values about the universe and human existence are derived from their understanding of creation stories.</p>	<p>Pupils:</p> <ul style="list-style-type: none"> Analyse accounts from scientists who are Christians, Hindus, Muslims or atheists about the importance of religious belief; identify how their own world views and assumptions can affect their understanding of religion and questions about origins of the universe and human existence; interaction between scientific and religious ideas in discussions about one topical issue. 	<p>Note that this activity builds on the work in the first part of this unit, in which the pupils discuss the question of truth and how to identify it.</p>



Creation and Origins

Theme 6: Will humans ever know for sure how the universe came about?

There are opportunities for assessment for learning throughout this unit. However, in this activity, there are particular opportunities to collect evidence of what children know, understand and can do, using the learning objectives and outcomes.

Learning objectives	A T 1	A T 2	Teaching and Learning	Learning outcomes	Points to note
<p>Pupils should:</p> <ul style="list-style-type: none"> know a range of responses to the question 'How can we answer questions about origins?' understand some of the reasons for similarities and differences between the views of creation and origins considered in this unit; reflect on the boundaries to human knowledge and on how religion and science might contribute to our awareness of these boundaries. 	□	□	<p>Design a multimedia presentation with the title: Will humans ever really know for sure how the universe came about?</p>	<p>Pupils:</p> <ul style="list-style-type: none"> explain a range of responses to the question 'How can we answer questions about origins?' suggest possible reasons for similarities and differences between the views of creation and origins considered in this unit; express their own views on the boundaries to human knowledge and how religion and science might contribute to our awareness of these boundaries. 	<p>Consider organising this task so that the pupils complete their presentations either individually, in pairs or in small groups. In each case, the pupils will need to undertake peer assessment and make clear who is credited with each aspect of the work!</p>



Creation and Origins

Resources

A guide to science and belief, by M Poole (1997) – this publication addresses the view that science and belief are in conflict.

Bitesize revision – supported by the BBC, this website includes a ‘Religious Education’ section, which contains materials on religion, science and the environment. <https://www.bbc.com/education/subjects/zh3rkqt>

Humanism UK – this association’s website offers materials for teaching and learning about Humanism.

God talk, Science talk: Teacher’s guide to science and belief, by M Poole et al (1997) – this pack includes ideas for teaching RE in secondary schools.

HubbleSite – this website includes images of space taken from the Hubble telescope. <http://hubblesite.org/images/gallery>

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IslamiCity.com – the ‘Science’ section of this website provides information and articles about the relationships between science and Islam.
<http://www.islamicity.org/explore/nature/>

‘Picturing Creation’ – <http://www.westhillendowment.org/picturing-creation> images by the artist Kate Neal, depicting each of the seven days of creation.

Religion and science, by B Russell – this publication offers a brief study of the debates between science and traditional religion during the last four centuries.

Science and Religion in Schools – this web-based project offers guidance on teaching science and religions, including a guidebook, CD-ROM and other materials for download. <http://www.srsp.net>

The Christian Bible: Genesis:1 - 3 Includes the text that Christians associate with the creation of the universe.

The Qur’an: Surah 25:59, 7:54-56, 21:30-33 Some of the texts that Muslims associate with the creation of the universe.

Key Stage 4

Introduction

Programme of Study

What schools should do

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Key Stage 4 Religious Education

Introduction

During Key Stage 4, all students should extend and deepen their knowledge and understanding of religions and other worldviews, reflecting personal, local, national and global contexts. Building on prior learning, they should interpret and analyse the expressions of beliefs that they encounter.

Students should be able to research and investigate the influence and impact of religions and beliefs on the values and lives of both individuals and groups, evaluating their impact on current affairs. They should be able to appreciate, compare and appraise the beliefs and practices of different religions and other worldviews, articulating well-reasoned positions.

Students should be able to use theological, philosophical and sociological approaches, including the analysis of texts. As an integral part of learning, students should be given the opportunity to engage with people and communities of faith within school or through visits outside school.

Programme of Study

At Key Stage 4 all pupils should fulfil their entitlement by following an accredited specification (from a recognised examination board) in Religious Studies to fulfil the requirement of the Agreed Syllabus. Schools should provide reasonable time for pupils to complete this and if appropriate, to attain a recognised qualification, such as a full or short course Religious Studies GCSE or special schools may wish to provide an Asdan Course in, for example, beliefs and values.

While there is no legal requirement that students must sit public examinations, students deserve the opportunity to have their learning in the statutory curriculum subject of religious education accredited. The decision therefore to enter pupils for an examination at the end of the course is at the schools' discretion.

What schools should do

Schools should provide religious education to every student in accordance with legal requirements. Religious education must be taught according to the locally agreed syllabus, which, in this case, specifies an accredited course as the programme of study at Key Stage 4.



Key Stage 5 – Sixth Form Religious Education

The contribution of Religious Education to the Post-16 Curriculum

Page 629

Attainment Targets

Delivering the agreed syllabus Religious Education requirements





Key Stage 5 – Sixth Form Religious Education

Introduction: The contribution of Religious Education to the Post-16 Curriculum

Religious Education is a statutory requirement for all students in Key Stage 5 who are registered in either a school with a sixth form, a sixth form college constituted as a school or registered in a school working as part of a consortium, except for those withdrawn by their parents. It must be made available in sixth form colleges to students who wish to take it. Although it is not a requirement in colleges of further education, similar arrangements should apply.

Schools should provide Religious Education to every student in accordance with legal requirements. It must be taught according to the locally agreed syllabus or faith community guidelines.

Religious Education courses broaden and enhance the curriculum by giving students the opportunity to consider a wide range of religious, philosophical, psychological, sociological and ethical issues and to develop their own codes of belief.

Sixth form Religious Education is intended to support and recognise the achievements of all students at Key Stage 5.

The flexible course of study explained in these requirements promotes the religious imagination and the development of key skills. It provides for students with a variety of aptitudes, abilities and needs that may not be fully met through current AS and A Level examination syllabuses and encourages all students to explore ways of communicating and presenting their knowledge and understanding of religion in a variety of media.

In this way sixth form Religious Education caters for and affirms a range of learning styles, individual interests and gifts and talents of students.

Religious Education at post-16 should be planned as carefully as in the statutory period of schooling and should give due consideration to:

- breadth and balance of knowledge, understanding and skills;
- differentiation to meet the needs and abilities of the full range of students;
- the spiritual and moral development of students;
- preparation for work and adult life;
- progression and continuity from Key Stage 4 and through the Sixth Form;
- assessment and accreditation wherever possible including self and peer assessment;
- challenge.



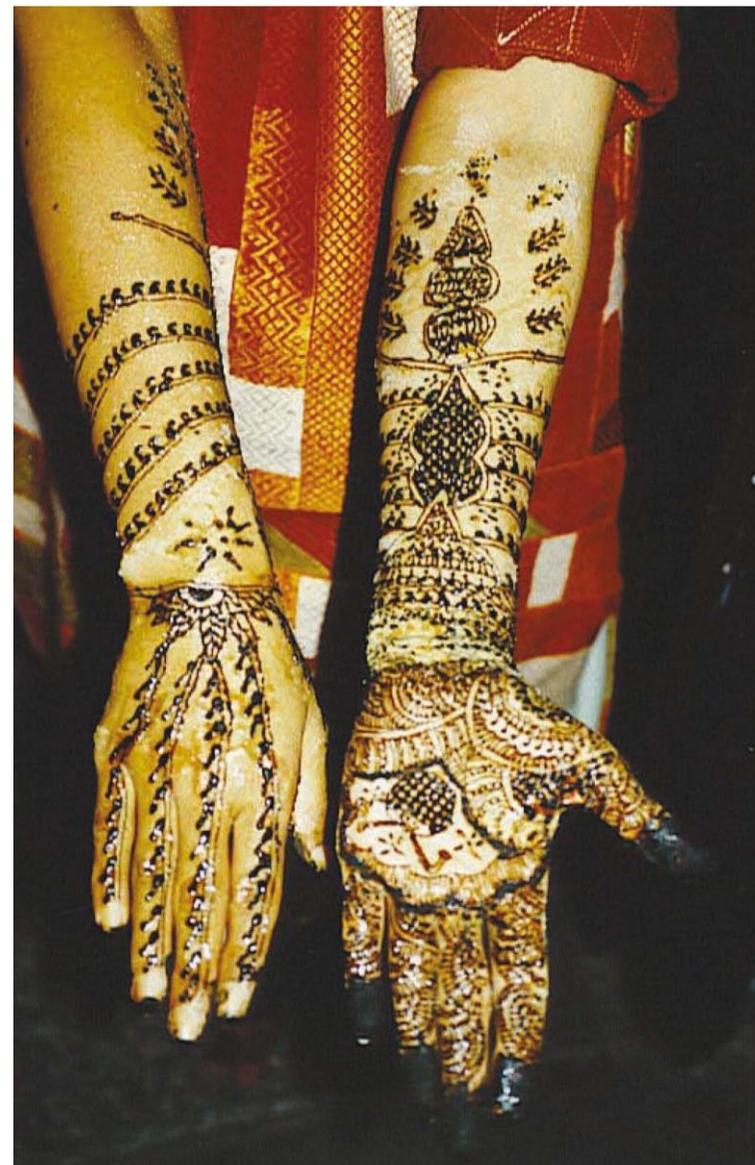
Key Stage 5 – Sixth Form Religious Education

The two Attainment Targets, 'Learning about Religions' and 'Learning from Religions' continue to underpin the syllabus at this stage and all planning should cater for both of these.

Attainment Target 1: Learning about religions

Students should be taught to:

- investigate, study and interpret significant religious, philosophical and ethical issues, including the study of religious and spiritual experience, in light of their own sense of identity, experience and commitments;
- think rigorously and present coherent, widely informed and detailed arguments about beliefs, ethics, values and issues, drawing well-substantiated conclusions;
- develop their understanding of the principal methods by which religions and spirituality are studied;
- draw upon, interpret and evaluate the rich and varied forms of creative expression in religious life;
- use specialist vocabulary to evaluate critically both the power and limitations of religious language.





Key Stage 5 – Sixth Form Religious Education

Attainment Target 2: Learning from religion

Students should be taught to:

- reflect on, express and justify their own opinions in light of their learning about religion and their study of religious, philosophical, moral and spiritual questions;
- develop their own values and attitudes in order to recognise their rights and responsibilities in light of their learning about religion;
- relate their learning in Religious Education to the wider world, gaining a sense of personal autonomy in preparation for adult life;
- develop skills that are useful in a wide range of careers and in adult life generally, especially skills of critical enquiry, creative problem-solving, and communication in a variety of media.

Learning about religion includes enquiry into and investigation of the nature of religion, its key beliefs, teachings and practices, their impact on the lives of believers and communities, and the varying ways in which these are expressed.

It also includes the skills of interpretation, analysis and explanation.

Pupils learn to communicate their knowledge and understanding using specialist vocabulary.

It also includes identifying and developing an understanding of ultimate questions and ethical issues.

Learning from religion is concerned with developing pupils' reflection on and response to their own experiences and their learning about religion. It develops pupils' skills of application, interpretation and evaluation of what they learn about religion, particularly to questions of identity and belonging, meaning, purpose and truth and values and commitments, and communicating their responses.



RE for Sixth Form - Examples of study visits / field trips / residentials

The Key Stage 5 section of the Lewisham Agreed Syllabus has been updated to reflect recent national curriculum developments and issues with a focus on encouraging young people to have enquiring minds, communicate ideas and develop their knowledge, skills and religious literacy.

As with the previous Agreed Syllabus, there is no prescription of content, curriculum design, methods of teaching and learning styles at this key stage so that schools can plan and deliver an appropriate curriculum that provides a coherent and meaningful experience for their students while meeting statutory obligations and contributing to other current priorities for all schools, e.g. Safeguarding, British Values, Prevent Strategy, provision for pupils' spiritual, moral, social and cultural development.

Links with the wider curriculum

There are a number of ways that schools could extend opportunities for students to engage with a wider thematic and issues-based curriculum. Those engaged in sixth form teaching are keen to provide opportunities for students to become more articulate and reflective. They are also mindful of the need for CV building so that all students can present themselves with some confidence when applying for Higher Education and careers. The longer-term aim is to prepare young people for adulthood, of course, not just to pass exams.

In a recent discussion with the Young Mayor's advisers, those young people believed it was important to find out about and debate issues around beliefs and values of those in the wider community and to consider how these are reflected in current affairs here and abroad.

Aims

This Key Stage 5 syllabus aims to:

- build on the previous educational experience of young people while recognising their maturity, status and interests at this stage of their education;
- engage young people in a systematic enquiry into significant human questions so that they can develop the understanding and skills needed to appreciate and appraise varied responses to these questions, as well as develop views of their own;
- enable young adults to engage with a wide range of ideas and beliefs in contemporary society through a range of disciplines including philosophy, psychology, sociology, science, the arts and literature;
- prepare students for a greater understanding of the role of belief and culture in the modern world, enabling them to develop more critical approaches to media and popular portrayals of religion, faith and belief; and
- provide a range of opportunities for investigation, personal research, discussion and presentation of views and ideas.



RE for Sixth Form - Examples of study visits / field trips / residentials

Opportunities

Schools should provide their students with the opportunity to:

- develop their knowledge and understanding of the nature, role and influence of religion and belief in the world;
- explore a personal sense of meaning and purpose in own their lives and how they relate to others;
- develop their skills and ability to arrive at a reasoned opinion and to handle controversial issues; and
- develop an understanding of and respect for different beliefs and life- styles.

Content

The following units are suggestions of the type schools might wish to offer either as stand-alone study/discussion units or through other approaches suggested below:

- Why do people believe in the existence of God?
- What impact do religious and other beliefs have on morality, behaviour, culture and politics?
 - Ethics – how does belief impact on medical ethics and practice e.g. abortion, euthanasia, cloning, organ donation, medical treatment?
 - Conflict – what part do religious and other belief systems play in conflict on a personal, community and global level? What enables different individuals and communities to live together respectfully for the wellbeing of everyone?
 - How have religious beliefs and practices changed over time? Are they still evolving? Is there a difference between a religion and a cult?
 - What has been (and continues to be) the impact of religion on science and the arts.
 - Personal faith and values – and their impact on individual behaviour, relationships, gender, sexuality and personal responsibility.
 - What are the ethical issues involved in global issues such as population growth, the environment, famine and thirst, migration, modern slavery, etc?
 - How do religions and beliefs deal with issues of good and evil?
 - What do we feel about how religions and beliefs are portrayed in the media?



RE for Sixth Form - Examples of study visits / field trips / residentials

Delivery

The Agreed Syllabus expectations for sixth form Religious Education are 18 hours per year to include at least one experiential opportunity such as a conference or field trip. This would be the equivalent of 3 full day or 6 half day conferences but it could be delivered in a variety of imaginative ways to engage all young people – visits, debates, film, exhibitions, theatre visits, etc.

The following are some suggestions as to how schools individually and collectively might move forward on this:

- a) Debates: There is already some experience of this within schools and there has been a strong tradition of Lewisham-wide debating for young people across different schools and colleges. One suggestion would be for there to be an inter sixth-form debate, open to all schools and colleges in the borough, to be held in the Civic Suite and hosted by the Mayor and the Young Mayor. A wide range of ethical /moral issues would make ideal subjects for debate.
- b) Schools could offer a half day conference for their own students, and possibly open to other students, with invited guest speakers on a topic that would have resonance for young people e.g. *Is nuclear war ever justified? What are the implications of AI for humanity? Should there be limitations on personal wealth?*
- c) There could be a joint conference – out of school hours – open to students from across the borough schools. Schools could take it in turns to host one of these each year.
- d) Universities might be approached to lead a small programme of expert seminars with the staff from a range of departments (e.g. philosophy, theology, politics, and religious literacy)
- e) Schools could arrange termly visits to significant places of worship or other venues like the Holocaust Centre - perhaps a role for a sixth form student council?
- f) A catalogue of good and reliable guest speakers could be drawn up for use by schools and colleges taking due consideration of the new rules for General Data Protection Regulation (GDPR) compliance.
- g) An annual essay competition could be established with an appropriate prize e.g. a visit hosted by a politician to the Lords or Commons. This could include meeting members of one of the All Party Parliamentary groups on issues around faith or belief.
- h) Volunteering and fund raising linked to a charity or hospice.
- i) Each taught A Level or vocational programme might, if they are not doing this already, consider moral and ethical considerations relevant to the subject.
- j) A Sixth Form Question Time – for Lewisham sixth form students – chaired by a student with invited guests including local MPs and organised and recorded with the help of A Level or Tec media students
- k) The school's programme should be published on the school 's website with other curriculum planning. It should clearly explain which faiths and beliefs will be included and be visible for parents and other interested bodies to examine

Glossaries

Introduction

Baha'i

Buddhism

Christianity

Hinduism

Humanism

Islam

Judaism

Sikhism



Religious Education – Glossaries of Terms

This glossary is based on: *Religious Studies – A Glossary of Terms*, GCSE which was published by the School Examination Council (SEC) in 1986. With the publication of the model syllabuses for religious education, and the work involving the faith communities in Britain, it was felt to be an appropriate time for its first revision. Since then many Agreed Syllabi have used it. For the Lewisham Agreed Syllabus 2018 additional sections on Baha’i and Humanism have been added and several other sections have been updated.

The glossary has been devised by the different faith and belief communities to:

Page 637 give guidance to teachers on key words and their meanings within religious traditions and Humanism

try to reach some form of consensus on spellings. This is almost an impossible task, due to the problems of transliterating from one script to another, for example from Gurmukhi with 35 characters into the Roman script of 26 characters.

It is important for pupils to build up a working knowledge of key words and technical terms which are used within each religion, and which are therefore central to Religious Education.

Publishers take note of the work that went into the original glossary which had the full backing of religious traditions represented in the UK, so that all resources produced thereafter to support Religious Education, adopted the preferred form emphasised in bold within the documents.

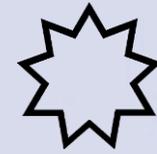
Words printed in red are themselves main entries and can be cross-referenced within this glossary. Literal translations into English are printed in italics.

Acknowledgements are due to:

- all those who produced the original glossary
- the faith communities and organisations consulted on this revision



PREFERRED FORM	EXPLANATION
'Abdu'l-Bahá*	Eldest son and appointed successor of Bahá'u'lláh. His title literally means Servant of Bahá (Arabic word for Glory). He lived from 23 May 1844 - 28 November 1921. 'Abdu'l-Bahá travelled to Europe and North America; when he was released from exile for His religious beliefs, He came to London, including Woolwich, in 1911 and again in 1913 and gave many talks about the need for unity and peace in the world.
Báb, The*	His title literally means The "Gate". The title was given to Siyyid 'Ali Muhammad, who lived from 20 October 1819 - 9 July 1850. The Founder of the Bábi Faith, and told of the coming of Bahá'u'lláh.
Baha'í Bahá'u'lláh*	Literally "one of Glory" or "follower of Bahá'u'lláh." The title translates as "The Glory of God". The title was given to Mirza Husayn-'Ali Nuri, the Founder of the Bahá'í Faith. He lived from 12 November 1817 - 29 May 1892. In spite of a life of imprisonment and persecution, Bahá'u'lláh wrote thousands of letters, including to monarchs and rulers – one was addressed to Queen Victoria. He also revealed many other documents, all based on the central themes of the Bahá'í faith, and about 15,000 originals still exist. Bahá'u'lláh is referred to by a variety of titles, including the Blessed Beauty, the Author of the Bahá'í Revelation, the Divine Physician and the Prince of Peace.
Local Spiritual Assembly (LSA)	A body of nine members, elected once per year, who are responsible for the spiritual and administrative affairs of a particular locality. In London, there is an LSA in each borough of the city. Elections take place during the Ridván festival, which happens between the end of April and the beginning of May every year. Campaigning and discussion of nominations is not allowed.
Manifestation of God	A Bahá'í term for the founders of the major world religions, who are seen as a voice of God. Bahá'í scripture identifies ten historic individuals as Manifestations: Abraham; Moses; Jesus Christ; Muhammad; Krishna; Zoroaster; Buddha; The Báb; and Bahá'u'lláh
National Spiritual Assembly	A body of nine members, elected once per year, who are responsible for the spiritual and administrative affairs of a particular country. The members are elected by the local spiritual assembly members in their country. Campaigning and discussion of nominations is not allowed.
Shoghi Effendi*	The title of Shoghi Rabbání, the great-grandson of Bahá'u'lláh, appointed by 'Abdu'l-Bahá as the Guardian of the Bahá'í Faith. Shoghi Effendi was a student at Oxford University. He is buried in the New Southgate Cemetery in North London.



PREFERRED FORM

EXPLANATION

Universal House of Justice

Supreme governing body of the **Bahá'ís** around the world. They are an elected body of nine individuals, who are responsible for the administration and spiritual advancement of the **Bahá'í** world. Each member is elected to serve a period of five years but can be re-elected to serve more than one term. The members are elected by the members of the **National Spiritual Assemblies** of each country. The seat of the Universal House of Justice is located in Haifa, Israel.

***Please note:** The titles given to each of the central Figures of the Faith are in the Arabic language.



SANSKRIT

PALI

EXPLANATION

The primary languages of Buddhism are Indian in origin, especially Sanskrit and Pali and technical terms are generally referenced using one or the other. As Buddhism spread throughout the East, it came to be expressed in the local languages and the Japanese, Tibetan or Chinese equivalents are often used in traditions that come from these cultures. There is no preferred form. Both Pali and Sanskrit are used here, as appropriate and terms in other languages are indicated by brackets (Chinese) etc.

Abhidharma

Abhidhamma

*Further or higher teaching. Systematic analysis of Buddhist doctrine, including analysis of mental states (sometimes referred to as Buddhist Psychology). The Abhidhamma Pitaka is the third of the **Three Baskets** and systematises the teachings found in the **Sutta Pitaka**.*

Anatman

Anatta

*Non self; no self. One of the **Three Marks of Existence**. The complete lack of substance or emptiness of our sense of self or 'me'.*

Anitya

Anicca

*Impermanence and change. A key quality of samsara and another of the **Three Marks**. The instability and insubstantiality of all things, including our sense of self.*

Arhat

Arahat, Arahant

*Enlightened disciple. The fourth and highest stage of realisation recognised by the **Theravada** tradition. One whose mind is free from all greed, hatred and ignorance.*

Arya Satya

Arya Satta

Four Noble Truths

Ashoka

Asoka

Emperor of India in the 3rd century BCE.

Atman

Atta

Self; soul.

Bhikshu

Bhikkhu

Fully ordained Buddhist monk.

Bhikshuni

Bhikkhuni

Fully ordained Buddhist nun

Bodhicitta Utpada

Bodhisattva Vow; Arousing Bodhicitta. The great aspiration to follow the bodhisattva path to its end, for the benefit of others.

Bodhicitta

Awakened heart/awakened mind. The union of Wisdom and Compassion.



SANSKRIT	PALI	EXPLANATION
Bodhisattva	Bodhisatta	<p>A person who has made the vow follow the bodhisattva path to complete awakening over many lifetimes. For example, Siddhartha Gautama, before his enlightenment as the historical Buddha.</p> <p>The inspiration of the bodhisattva vow is a central feature of Mahayana. The trainee bodhisattva works to give up any ambition to free themselves in order to help all other beings become liberated from suffering (see Mahayana).</p>
Maha Bodhisattva		<i>Great Bodhisattvas</i> like Avalokiteshvara, Tara and Manjusri are at the end of the path. They are more like Buddhas and have similar power and understanding.
Brahma Viharas	Brahma Viharas	The four immeasurable states: loving kindness, compassion, sympathetic joy, and evenness of mind.
Buddha	Buddha	<i>Awakened or Enlightened One</i> . Not the name of an individual but a title given to those who have become awakened.
Dalai Lama (Tibetan)		<i>Great Ocean</i> . Spiritual and temporal leader of the Tibetan people.
Dana	Dana	<i>Generosity, offering, giving</i> .
Dharma	Dhamma	Ultimate truth from the Buddhist perspective. The teachings of the Buddha . One of the Three Jewels.
Dharmapada	Dhammapada	Famous Pali scripture of 423 verses.
Dhyana	Jhana	Also Ch'an (Chinese) and Zen (Japanese). General term for meditation.
Duhkha	Dukkha	Normally translated as <i>suffering</i> , but actually a much broader term that implies the whole spectrum of unsatisfactory and frustrating experience, ranging from the most intense and claustrophobic pain to the most subtle sense of incompleteness. The first of the Four Noble Truths and one of the Three Marks .
Gompa (Tibetan)		Monastery; place of meditation.



SANSKRIT	PALI	EXPLANATION
Jataka	Jataka	<i>Birth story.</i> Accounts of the previous lives of the Buddha .
Kangyur (Tibetan)		<i>Translated Buddha Word.</i> Tibetan collection of Buddha's teachings.
Karma	Kamma	<i>Action.</i> Intentional actions that affect one's circumstances in this and future lives. Not the popular idea of the result of those actions.
Klesa	Kilesa	<i>Negative emotion; mental poison.</i> Hatred, desire and ignorance are the three fundamental kleshas. All the other kinds come from these three.
koan (Japanese)		A technical term used in Zen Buddhism referring to enigmatic or paradoxical questions used to develop spiritual intuition. Also refers to religious problems encountered in daily life.
Kshanti	Khanti	<i>Patience; forbearance; acceptance</i>
Kwan-yin (Chinese)		Also, Kannon (Japanese). Bodhisattva of Compassion, depicted in female form. Identified with Bodhisattva Avalokitesvara.
Lama (Tibetan)		<i>Teacher.</i> Tibetan translation of Sanskrit <i>Guru</i> .
Mahayana		<i>Great Way or Vehicle.</i> Teachings that spread from India into Tibet, parts of Asia and the Far East characterised by the Bodhisattva path and the prominence given to the development of both wisdom and compassion.
Maitri	Metta	<i>Loving kindness.</i> A pure love which is neither grasping nor possessive. The wish that others should have happiness and the cause of happiness.
Maitreya	Metteya	One who has the nature of loving kindness. Name of the future Buddha .
Maitri Sutra	Metta Sutta	Buddhist scripture which describes the nature of loving kindness.
Mala		Literally <i>garland</i> . Also, Juzu (Japanese). String of 108 beads used in Buddhist practice (like a rosary).



SANSKRIT	PALI	EXPLANATION
Marga	Magga	<i>Path</i> , leading to cessation of suffering. The fourth Noble Truth
Mudita	Mudita	<i>Sympathetic joy</i> . Welcoming the good qualities and good fortune of others.
Mudra	Mudda	Ritual gesture, as illustrated by the hands of Buddha images
Nirodha	Nirodha	<i>Cessation</i> (of suffering). The third Noble Truth.
Nirvana	Nibbana	<i>Blowing out</i> of the fires of greed, hatred and ignorance.
Paramita	Parami	<i>Transcendent perfection</i> or <i>virtue</i> . There are six or ten paramitas that need be perfected on the bodhisattva path for the attainment of Buddhahood.
Parinirvana	Parinibbana	Final and complete nirvana reached at the passing away of a Buddha
Prajna	Panna	<i>Wisdom</i> . Understanding the true nature of things.
Prajnaparamita Hridaya Sutra		<i>Heart Sutra</i> . Buddha's heart teaching on transcendent wisdom.
Pratimoksha	Patimokkha	The training rules of a monk or nun - 227 in the case of a Theravada monk.
Samadhi	Samadhi	<i>Meditative absorption</i> . A state of deep meditation.
Samjna	Sanna	<i>Perception</i> . Third of the five Skandhas .
Samsara	Samsara	<i>Conditioned existence</i> ; the wheel of birth and death, driven by ignorance, desire and hatred, and characterized by dukkha, or suffering.
Samskara	Sankhara	<i>Mental/karmic formation</i> . The fourth of the five Skandhas .
Samudaya	Samudaya	<i>Arising; origin</i> (of suffering). The second Noble Truth.
Sangha	Sangha	<i>Community; assembly</i> . Often used for the order of bhikkhus and bhikkunis in Theravadin countries. More widely the community of practicing Buddhists.
Satori (Japanese)		<i>Awakening</i> . A term used in Zen Buddhism.



SANSKRIT	PALI	EXPLANATION
Shamatha	Samatha	<i>Calm abiding.</i> Meditation leading to a state of concentrated calmness; (see also Vipassana).
Shakyamuni	Sakyamuni	<i>Sage of the Shakyas</i> (the tribe of the Buddha). Epithet of the historical Buddha.
Shila	Sila	<i>Ethics and Discipline.</i> The Five Precepts are the basis for discipline in Buddhism. Monks and nuns follow a more elaborate form (Pratimoksha). In Mahayana the Bodhisattva vow has its own accompanying discipline and there are yet further elaborations in Vajrayana.
Siddhartha	Siddattha	<i>Wish-fulfilled.</i> The personal name of the historical Buddha when he was a prince.
Skandha	Khandha	<i>Heap; aggregate.</i> The Five skandhas together make up the 'person' (form, feeling, perception, mental formation and consciousness).
Sthaviravada	Theravada	<i>Way of the Elders.</i> Form of Buddhism prevalent in Thailand, Sri Lanka and South East Asia generally. Also found in the West.
Stupa	Thupa/Cetiya	<i>Reliquary</i> (including pagodas). Devotional structure containing Buddhist relics. See example in Battersea Park.
Sutra	Sutta	Text containing the word of the Buddha.
Sutra Pitaka	Sutta Pitaka	The second of the Three Baskets or collections that contains the Buddha's fundamental teachings on meditation and wisdom.
Tathagata	Tathagata	Another epithet for the Buddha .
Tri Lakshana	Tilakkhana	<i>The Three Marks of Existence; Three Signs of Being.</i> Anitya, Dhukha, Anatman.
Trishna	Tanha	<i>Thirst; craving; desire</i> (rooted in ignorance). Desire as the cause of suffering. The second Noble Truth.
Tripitaka	Tipitaka	<i>Three Baskets.</i> A threefold collection of texts (Vinaya, Sutta, Abhidamma).



SANSKRIT	PALI	EXPLANATION
Triratna	Tiratana	<i>The Three Jewels or Refuges.</i> Buddha, the Dharma and the Sangha.
Tulku (Tibetan)		Incarnate Lama in Tibetan Buddhism
Upaya		<i>Skillful means</i> , e.g. meditation on loving kindness, to overcome anger. Compassionate action.
Upeksha	Upekkha	<i>Equanimity; evenness of mind.</i>
Vaishaka	Wesaka, or Vesaka (Sinhalese)	Buddha Day. Name of a festival and a month. The birth, enlightenment and passing away of the Buddha are celebrated on the full moon of Wesak (in May or June). Some schools celebrate only the birth at this time, e.g. Zen.
Vajrayana		<i>Indestructible Vehicle, Diamond Way.</i> Form of Mahayana in which the Guru is central. Once widespread but now mostly found in Tibetan Buddhism.
Vedana	Vedana	<i>Feeling.</i> The second of the Five Skandhas.
Vihara	Vihara	<i>Dwelling place; monastery.</i>
Vijnana	Vinnana	<i>Consciousness.</i> The fifth of the Five Skandhas.
Vinaya	Vinaya	The rules of discipline of monastic life.
Vinayapitika	Vinayapitaka	The first of the Three Baskets of the Buddhist canon, containing mostly the discipline for monks and nuns, with many stories and some teachings.
Vipashyana	Vipassana	<i>Insight meditation.</i> Meditation into the true nature of things. One of a pair with Samatha.
Virya	Virya	<i>Energy; exertion.</i>
Zazen (Japanese)		Formal seated meditation, in Zen Buddhism.
Zen (Japanese)		Meditation. Derived from the Sanskrit 'dhyana'. A school of Mahayana Buddhism that developed in China and Japan.



PREFERRED FORM	MAIN VARIANT	EXPLANATION
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Unlike the other five world faiths included in this glossary, most of the terms given below are in English and will be familiar to many people. The historic languages of the Christian scriptures are Hebrew, Greek and Latin. The Old Testament was written largely in Hebrew, with some texts in Aramaic and Greek (Apocrypha). The whole of the Old Testament was translated into Greek, although many words and passages have their origin in Aramaic. Latin became increasingly the language of the Western Church from the 5th century AD when the Bible was translated into Latin.

Absolution		The pronouncement by a priest of the forgiveness of sins.
AD	Anno Domini	<i>In the Year of the Lord.</i> The Christian calendar dates from the estimated date of the birth of Jesus Christ .
Advent		<i>Coming.</i> The period beginning on the fourth Sunday before Christmas (40 days before Christmas in the Eastern Orthodox tradition). A time of spiritual preparation for Christmas.
Agape		<i>Love. Often the love of God.</i> New Testament word used for the common meal of Christians; a Love Feast.
Altar	Communion Table Holy Table	Table used for Eucharist, Mass, Lord's Supper . Some denominations refer to it as Holy Table or Communion Table.
Anglican		Churches in full communion with the See of Canterbury. They are part of the Anglican Communion. In England, the Anglican Church is called: The Church of England (Church in Wales in Wales; Church of Ireland in Northern Ireland and the Republic and Scottish Episcopal Church in Scotland)
Apocalyptic		(i) <i>Revelatory</i> , of God's present purposes and of the end of the world.(ii) Used of a literary genre, e.g. the Book of Revelation.
Apocrypha		Books of the Old Testament that are in the Greek but not the Hebrew Canon . Some Churches recognise the Apocrypha as part of the Old Testament Canon .
Apocryphal New Testament		A modern title for various early Christian books
Apostle		One who was sent out by Jesus Christ to preach the Gospel .



PREFERRED FORM	MAIN VARIANT	EXPLANATION
Ascension		The event, 40 days after the Resurrection , when Jesus ‘ascended into heaven’ (see Luke 24 and Acts 1).
Ash Wednesday		The first day of Lent . In some Churches , penitents receive the sign of the cross in ashes on their foreheads.
Atonement		Reconciliation between God and humanity; restoring a relationship broken by sin.
Baptism		Rite of initiation involving immersion in, or sprinkling or pouring of, water.
Baptist		(i) A member of the Baptist Church , which grew out of the Anabaptist movement during the 16 th century Reformation . (ii) A Christian who practices Believer’s Baptism . iii) Title used for Jesus’ cousin, John, which indicates that much of his ministry was about baptizing people.
Baptistry		(i) Building or pool used for baptism , particularly by immersion. (ii) Part of a church , where baptism takes place.
BC	Before Christ	Period of history before the estimated birth of Jesus Christ .
Believer’s Baptism		The baptism of people who are old enough to understand the meaning of the rite.
Benediction		(i) Blessing at the end of worship. (ii) late afternoon or evening service at the end of which the blessing is given with the consecrated host (generally displayed in a monstrance) usually in a Roman Catholic or Anglican context.
Blessed Sacrament		Bread and wine which have been consecrated and set aside for future use and to be taken to the sick and housebound. The blessed or reserved sacrament is usually kept in a tabernacle or aumbry. (usually in the Roman Catholic Church and the Anglican church).
Canon	Scripture	The accepted books of the Bible. Some add the deuterocanonical books to the OT Canon



PREFERRED FORM	MAIN VARIANT	EXPLANATION
Catholic		(i) <i>Universal</i> . (ii) Often used as an abbreviation for Roman Catholic . (iii) used to describe a particular wing of the Anglican Church (Anglo-Catholic, Liberal Catholic, Modern Catholic are all part of this wing).
Charismatic		A movement within the Church , emphasising spiritual gifts, such as healing or speaking with tongues.
Chrismation		(i) The Orthodox second sacrament of initiation by anointing with chrism (a special oil). Performed at the same time as baptism . (ii) Anointing with oil, e.g. healing or coronation.
Christ	Messiah	<i>The anointed one</i> . Messiah is used in the Jewish tradition to refer to the expected leader sent by God, who will bring salvation to God's people. Jesus' followers applied this title to him, and its Greek equivalent, Christ, is the source of the words Christian and Christianity.
Christmas		Festival commemorating the birth of Jesus Christ (25 December in most Churches, 6th January in Eastern Orthodox Churches)
Church		(i) The whole community of Christians. (ii) The building in which Christians worship (iii) A particular denomination (iv) local church
Confession		Contrition; penance; admitting your mistakes/sins (i) One of seven sacraments observed by some Churches (mainly Roman Catholic and Anglican). There is a general confession at the beginning of the Eucharist/Mass/Holy Communion. Some churches also offer private confession: a priest confidentially hears a person's confession. The purpose of confession is to receive God's forgiveness and to change one's life. (ii) An admission, by a Christian, of wrong-doing. (iii) A particular official statement (or profession) of faith.
Congregationalist		Member of a Christian body which believes that each local church is independent and self-governing under the authority of Christ.



PREFERRED FORM	MAIN VARIANT	EXPLANATION
Consubstantiation		Doctrine of the Eucharist associated with Luther, which holds that after consecration, the substances of the Body and Blood of Jesus Christ and of the bread and wine co-exist in union with each other.
Creed		Summary statement of religious beliefs, often recited in worship, especially the Apostles' and Nicene Creeds.
Crucifixion		Roman method of executing criminals and traitors by fastening them to a cross until they died of asphyxiation; used in the case of Jesus Christ and many who opposed the Romans.
Deuterocanonical		Books that some churches, but not all, include in the OT.
Easter		Central Christian festival which celebrates the resurrection of Jesus Christ from the dead.
Ecumenism	Oikoumene	Movement within the Church towards cooperation and eventual unity between denominations.
Episcopacy		System of Church government by bishops.
Epistle	Letter	From the Greek word for letter. Several such letters or epistles, from Christian leaders to Christian Churches or individuals, are included in the New Testament. Most of them were written by the apostle Paul.
Eucharist		<i>Thanksgiving.</i> A service remembering the death and celebrating the resurrection of Jesus Christ . During this service, Jesus' final supper with his friends is remembered and, in a small way, re-enacted 'in his memory' using elements of bread and wine (see Holy Communion).
Evangelical		Group, or church (or a wing within the Anglican Church) , placing particular emphasis on the Gospel and the scriptures as the sole authority in all matters of faith and conduct.
Evangelist		(i) A writer of one of the four New Testament Gospels; (ii) a preacher of the gospel .



PREFERRED FORM	MAIN VARIANT	EXPLANATION
Font		Receptacle to hold water used in baptism . Usually placed near the entrance of the church as baptism is seen as the spiritual entry into the church.
Free Churches		Non-conformist denominations, free from state control (used of 20 Churches).
Good Friday		The Friday in Holy Week . Commemorates Jesus dying on the cross.
Gospel	Evangel	(i) <i>Good news</i> (of salvation in Jesus Christ). (ii) An account of Jesus' life and work.
Grace		(i) The freely given and unmerited favour of God's love for humanity. (ii) A prayer said at the end of a service (The Grace) (iii) Prayer of thanks before or after meals.
Heaven		The place, or state, in which souls will be united with God after death.
Hell		The place, or state, in which souls will be separated from God after death.
Holy Communion		Central liturgical service observed by most Churches (see Eucharist, Mass, Lord's Supper, Liturgy). Recalls the last meal of Jesus and celebrates his saving death.
Holy Spirit		The third person of the Holy Trinity . Active as divine presence and power in the world, and in-dwelling in believers to make them like Christ and empower them to do God's will.
Holy Week		The week before Easter , when Christians recall the last week of Jesus' life on Earth.
Icon	/lkon	Painting or mosaic of Jesus Christ , the Virgin Mary, a saint, or a Church feast. Used as an aid to devotion, usually in the Orthodox tradition.
Iconostasis		Screen, covered with icons , used in Eastern Orthodox churches to separate the sanctuary from the nave.
Incarnation		The doctrine that God took human form in Jesus Christ . It is also the belief that God in Christ is active in the Church and in the world.



PREFERRED FORM	MAIN VARIANT	EXPLANATION
Jesus Christ		The central figure of Christian history and devotion. The second person of the Trinity .
Justification by Faith		The doctrine that we can be saved only by our faith in God, not by what we do.
Kerygma		The central message about Jesus proclaimed by the early Christians.
Kyrie (Greek)		<i>O Lord</i> . Addressed to God, as in 'Kyrie eleison' (<i>Lord have mercy</i>).
Lectern		(i) Stand supporting the Bible, sometimes in the shape of an eagle. (ii) stand used by people doing readings or giving sermons in church
Lectiory		List of scriptural passages for systematic reading throughout the year.
Pentecost		Penitential season. The 40 days leading up to Easter .
Parish		<i>work / public duty</i> (i) Service of worship according to a prescribed ritual such as Evensong or Eucharist . (ii) Term used in the Orthodox Church for the Eucharist.
Logos		<i>Word</i> . Pre-existent Word of God incarnate as Jesus Christ .
Lord		A way of addressing God or of addressing Jesus.
Lord's Supper		Alternative term for Eucharist in some Churches (predominantly Non-conformist).
Lutheran		A major Protestant Church that receives its name from the 16th century German reformer, Martin Luther.
Mass		Term for the Eucharist , used by the Roman Catholic and other Churches . The word mass comes from 'ita missa est' the sentence used at the end of the service to send people out into the world to do God's work.
Maundy Thursday		The Thursday in Holy Week . Commemorates the Last Supper And the institution of the Eucharist / Mass / Lord's Supper
Methodist		A Christian who belongs to the Methodist Church which came into existence through the work of John Wesley in the 18th century.
Missal		Book containing words and ceremonial directions for saying Mass .



PREFERRED FORM	MAIN VARIANT	EXPLANATION
Mother of God		The title given to the Virgin Mary, mainly in the Orthodox, Anglican and Roman Catholic Churches , to underline the Trinitarian belief that Jesus was truly God (in this context, God refers to God incarnate as seen in Jesus Christ).
New Testament		Collection of 27 books forming the second section of the Canon of Christian Scriptures.
Non-conformist		Protestant Christian bodies which became separated from the established Church of England in the 17th century.
Old Testament		That part of the Canon of Christian Scriptures which the Church shares with Judaism, comprising 39 books covering the Hebrew Canon, and in the case of certain denominations, some Deuterocanonical books.
Ordination		In episcopal Churches , the 'laying on of hands' on priests and deacons by a bishop. In non-episcopal Churches, the 'laying on of hands' on ministers by other representatives of the Church.
Orthodox		(i) The Eastern Orthodox Church consisting of national Churches (mainly Greek or Slav), including the ancient Eastern Patriarchates. They hold the common Orthodox faith and are in communion with the Patriarchate of Constantinople. (ii) Conforming to the creeds sanctioned by the ecumenical councils, eg Nicaea, Chalcedon.
Palm Sunday		The Sunday before Easter , commemorating the entry of Jesus into Jerusalem when he was acknowledged by crowds waving palm branches.
Paraclete	Comforter	<i>Advocate</i> . Term used for the Holy Spirit .
Parousia		Generally used to refer to Jesus' second coming (which has not happened yet)
Passion		The sufferings of Jesus Christ , especially in the time leading up to his crucifixion .
Patriarch		(i) Title for principal Eastern Orthodox bishops. (ii) early Israelite leaders such as Abraham, Isaac, Jacob.



PREFERRED FORM	MAIN VARIANT	EXPLANATION
Pentecost	Whitsun	(i) The Greek name for the Jewish Festival of Weeks, or Shavuot, which comes seven weeks ('fifty days') after Passover. (ii) Celebration of outpouring of the Holy Spirit on the disciples on the day of Pentecost .
Pentecostalist		A Christian who belongs to a Church that emphasises certain gifts which were granted to the first believers on the Day of Pentecost (such as the power to heal)
Pope		The Bishop of Rome, head of the Roman Catholic Church .
Presbyterian		A member of a Church that is governed by elders or 'presbyters'; for instance, the national Church of Scotland.
Protestant		That part of the Church which became distinct from the Roman Catholic and Orthodox Churches when their members professed (or 'protested' - hence Protestant) the centrality of the Bible and other beliefs. Members affirm that the Bible, under the guidance of the Holy Spirit , is the ultimate authority for Christian teaching. Great emphasis put on the importance of the local church (rather than the centralized church)
Pulpit		An elevated platform from which sermons are preached (not always used these days).
Purgatory		In some traditions, a condition or state in which good souls receive spiritual cleansing after death, in preparation for heaven .
Quaker		A member of the Religious Society of Friends, established through the work of George Fox in the 17th century.
Redemption		Derived from the practice of paying the price of a slave's freedom; and so, the work of Jesus Christ in setting people free through his death.
Reformation		A 16th century reform movement that led to the formation of Protestant Churches . It emphasized the need to recover the initial beliefs and practices of the Church .



PREFERRED FORM	MAIN VARIANT	EXPLANATION
Resurrection		(i) The rising from the dead of Jesus Christ on the third day after the crucifixion . (ii) The rising from the dead of believers at the Last Day. (iii) The new, or risen, life of Christians.
Roman Catholic		That part of the Church owing loyalty to the Bishop of Rome, as distinct from Orthodox, Anglican and Protestant Churches.
Sacrament		An outward sign of an inward blessing, as in baptism or the Eucharist .
Salvationist		A member of the Salvation Army founded by William and Catherine Booth in the 19th century.
Sanctification		The process by which a believer is made holy, to become like Jesus Christ .
Sin		(i) Act of rebellion or disobedience against the known will of God. (ii) An assessment of the human condition as disordered and in need of transformation.
Synoptic		<i>Having a common viewpoint.</i> It is applied to the presentation of Jesus' life in the first three gospels of Matthew, Mark and Luke in contrast with that given in the Gospel of John.
Tabernacle		(i) A receptacle for the Blessed Sacrament or Reserved Sacrament , not immediately consumed but set aside or 'reserved' (mainly in Roman Catholic, Anglican and Eastern Orthodox Churches). The presence of the consecrated elements is usually signalled by a continuously burning light. (ii) Term used by some denominations of their building.
Transubstantiation		Roman Catholic doctrine concerning the Mass , defined at the Lateran Council of 1215, and confirmed at the Council of Trent in 1551. This states that in the Eucharist , at the words of consecration, the substance of the bread and wine becomes the substance of the Body and Blood of Jesus Christ , and that he is thus present in the bread and the wine.
Trinity		Three persons in one God; doctrine of the threefold nature of God - Father, Son and Holy Spirit .



PREFERRED FORM	MAIN VARIANT	EXPLANATION
<p>Unction</p> <p>United Reformed Church</p>	<p>Sacrament of the Sick</p>	<p>The anointing with oil of a sick or dying person.</p> <p>A Church formed by the union of English Congregationalists with the Presbyterian Church of England, and subsequently the Reformed Association of the Churches of Christ.</p>
<p>Vatican</p>		<p>The residence of the Pope in Rome, and the administrative centre of the Roman Catholic Church. The chief building of the Vatican is St Peter's Basilica, built on the traditional site of St Peter's tomb.</p>
<p>Virgin Birth</p>		<p>The doctrine of the miraculous conception of Jesus Christ by the Virgin Mary through the power of the Holy Spirit and without the agency of a human father.</p>



PREFERRED FORM MAIN VARIANT EXPLANATION

The main references are to Sanskrit terminology, although variants are found and used in other Indian languages. Lakshmi, Laksmi, Vishnu or Vis Visnu type variants are not always included because of their frequency. Many of these terms will also be found in books on Buddhism and Sikhism, but with somewhat different meanings. Proper names and place names are only included in this list if variant forms are commonly used.

Acharya	Acarya	<i>One who teaches by example.</i> Usually refers to a prominent or exemplary spiritual teacher.
Advaita	Adwaita	<i>Non-dual.</i> Refers to the impersonalistic philosophy which unqualifyingly equates God, the soul and matter.
Ahimsa	Ahinsa	<i>Not killing.</i> Non-violence; respect for life.
Artha		Economic development. The second aim of life.
Arti	Arati	Welcoming ceremony in which auspicious articles such as incense and lamps are offered to the deity or to saintly people.
Aryan		<i>Noble.</i> Refers to those who know the spiritual values of life. Scholars say it refers to the original inhabitants of the Sindhu region in India.
Ashram	Asram	A place set up for spiritual development.
Ashrama	Asrama	A stage of life (of which there are four) adopted according to material considerations, but ultimately as a means to spiritual realisation.
Atharva Veda		The fourth of the Vedas .
Atman	Atma	<i>Self.</i> Can refer to body, mind or soul, depending on context. Ultimately, it refers to the real self, the soul.
Aum	Om	The sacred symbol and sound representing the ultimate; the most sacred of Hindu words.



PREFERRED FORM	MAIN VARIANT	EXPLANATION
Avatar	Avatara, Avtara	<i>One who descends.</i> Refers to the descent of a deity, most commonly Vishnu. Sometimes it is translated as incarnation which, although inaccurate, may be the best English word available.
Ayodhya		Birthplace of Rama.
Bhagavad Gita		<i>The Song of the Lord.</i> Spoken by Krishna , this is the most important scripture for most Hindus. Tradition dates it back to 3,000 years BCE, though most scholars attribute it to the first millennium BCE. Considered an Upanishad .
Bhajan	Bhajana	Devotional hymn or song.
Bhakti		<i>Devotion; love.</i> Devotional form of Hinduism.
Bhakti-yoga		The path of loving devotion, aimed at developing pure love of God.
Brahma		A Hindu deity, considered one of the Trimurti , and in charge of creative power; not to be confused with Brahman or Brahmin .
Brahmachari	Brahmacari Brahmacharin Brahmcarin	One in the first stage of life, a celibate student of Vedic knowledge.
Brahmacharya	Brahmacarya Brahma ch(c)ari Brahma ch(c)arin	The first ashrama or stage of life.
Brahman		The ultimate reality, or the all-pervading reality; that from which everything emanates, in which it rests and into which it is ultimately dissolved.
Brahmin	Brahman	The first of the four varnas , the principal social Brahmana groupings from which priests are drawn. Some writers, rather confusingly, use the spelling 'brahman', and the meaning only becomes clear in the context of a few sentences (see also Brahman and Brahma).



PREFERRED FORM	MAIN VARIANT	EXPLANATION
Darshan Shastras		Six systems of Hindu philosophy – Nyaya, Vaisheshika, Sankhya, Yoga , Vedanta and Meemansa.
Dassehra	Dussehra, Dassera, Dashara (Other variants also found)	<i>Ten days</i> . Also called Vijay Dashami . Celebrates the victory of Rama on the tenth day of the bright half of the lunar month of Jyeshtha. As is often the case with Hindu festivals, followers may interpret the festival differently, eg in connection with Durga (see Navaratri).
Dharma		<i>Religion or religious duty is the usual translation into English, but literally it means the intrinsic quality of the self or that which sustains one's existence.</i>
Dhoti		A garment made of natural fibre (usually cotton or silk), worn by males, which covers the lower body and legs.
Dhyana		Meditation.
Diwali	Diwali, Dipavali, Deepavali	Festival of lights at the end of one year and beginning of the new year, according to one Hindu calendar.
Durga		<i>Female deity</i> . A form of the goddess Parvati ; wife of Shiva .
Dvaita	Dwaita	<i>Dual</i> . Refers to the personalistic philosophy that differentiates between God, the soul and matter.
Dwarka	Dvarka Dvaraka Dwaraka	Pilgrimage site on the west coast of India.
Ganesha	Ganesh Ganupati Ganapati	A Hindu deity portrayed with an elephant's head – a sign of strength. The deity who removes obstacles.
Ganga		<i>The Ganges</i> . Most famous of all sacred rivers of India.



PREFERRED FORM	MAIN VARIANT	EXPLANATION
Gangotri		Source of the river Ganges.
Gotra		Exogamous group within Jati
Grihastha	Gristhi Grhastha	The second stage of Hindu life; one who belongs to that stage, ie, the householder (grihasti).
Guna		<i>Rope; quality.</i> Specifically refers to the three qualities of sattva (goodness), rajas (passion) and tamas (ignorance), which permeate and control matter.
Guru		Spiritual teacher, preceptor or enlightener.
Hanuman		The monkey warrior who faithfully served Rama and Sita . Also called Pavansuta (son of the wind God).
Havan		Also known as Agnihotra. The basis of many Hindu rituals used at weddings and on other ceremonial occasions; the ceremony or act of worship in which offerings of ghee and grains are made into fire.
Havan kund		The container, usually square or pyramid shaped, in which the havan fire is burned.
Hitopadesh		Stories with a moral.
Holi		The festival of colours, celebrated in Spring.
Homa		Term often used interchangeably with havan .
The International Society for Krishna Consciousness (ISKCON)		A religious group of the Vaishnava tradition.
Janeu	Jenoi	Sacred thread worn by Hindus who study under a guru .
Janmashtami	Janmashtmi	The birthday of Krishna , celebrated on the eighth day of the waning moon in the month of Badra.



PREFERRED FORM	MAIN VARIANT	EXPLANATION
Japa	Jap	The quiet or silent repetition of a mantra as a meditative process.
Jati		<i>Caste</i> is the usual translation, meaning occupational kinship group.
Jnana	Gyan	<i>Knowledge</i> .
Jnana-yoga	Gyan-yoga	The path of knowledge, that aims at liberation.
Kali	Kaali	Name given to that power of God which delivers justice - often represented by the Goddess Kali (a form of Durga).
Kali yuga		The fourth of the ages; the iron age or the age of quarrelling and hypocrisy.
Kama		The third of the four aims of life – regulated sense of enjoyment.
Karma		<i>Action</i> . Used of work to refer to the law of cause and effect.
Karma-yoga		The path of self-realisation through dedicating the fruits of one's work to God.
Kirtan		Songs of praise; corporate devotional singing, usually accompanied by musical instruments.
Krishna		Usually considered an avatar of Vishnu . One of the most popular of all Hindu deities in contemporary Britain. His teachings are found in the Bhagavad Gita .
Kshatriya	Khatri	Second of the four varnas of traditional Hindu society, the ruling or warrior class.
Lakshmi	Laksmi	The goddess of fortune.
Mahabharata		The Hindu epic that relates the story of the five Pandava princes. It includes the Bhagavad Gita
Mala	Maala	Circle of stringed beads of wood or wool used in meditation.
Mandala	Mandal	A circle, area or community/group.
Mandir		<i>Temple</i> .



PREFERRED FORM	MAIN VARIANT	EXPLANATION
Mantra		That which delivers the mind. Refers to a short sacred text or prayer, often recited repetitiously.
Manusmriti		The laws of Manu. An ancient and important text on Dharma, including personal and social laws.
Marg		Path (see Jnana yoga , Karma yoga and Bhakti yoga).
Mata		<i>Mother</i> . Often associated with Hindu goddesses who represent shakti (power).
Mathura		Holy place connected with Krishna
Maya		Not this. Usually, it refers to illusion, particularly where the permanent soul identifies itself with temporary matter, eg the body, etc. It can also mean power.
Moksha	Moksa	Ultimate liberation from the process of transmigration, the continuous cycle of birth and death.
Mundan		The head-shaving ceremony. Performed in the first or third year of life.
Murti	Moorti	<i>Form</i> . The image or deity used as a focus of worship. 'Idol' should definitely not be used, and 'statue' may also cause offence.
Navaratri	Navaratra	The Nine Nights Festival preceding Dassehra , and held in honour of the goddess Durga
Nirvana		The cessation of material existence.
Panchatantra		Part of the supplementary Vedic scriptures, composed of animal stories with a moral.
Parvati		The consort of Shiva , also known by other names such as Durga , Devi, etc.
Prahlada	Prahalada	A great devotee of Vishnu , connected with the festival of Holi . Regulation of breath as a means of controlling the mind.
Pranayam	Pranayama	Regulation of breadth as a means of controlling the mind.



PREFERRED FORM	MAIN VARIANT	EXPLANATION
Prashad	Prasad Prasada Prashada	Sacred or sanctified food.
Pravachan		A lecture or talk, usually based on the scriptures.
Puja	Pooja	<i>Worship</i> . General term referring to a variety of practices in the home or Mandir.
Purana		<i>Ancient</i> . Part of the Smriti scriptures. Contains many of the well-known stories of Hinduism. Raja
Yoga Raj	Yoga	Path of self-control and meditation to realize God.
Rajas		Passion or creative potency, one of the three gunas (qualities of material nature).
Rakhi	Raakhi	A bracelet, usually made out of silk or cotton, tied to give protection and to strengthen the bond of mutual love.
Raksha Bandhan		The festival when women tie a decorative bracelet on their brothers' wrists.
Rama		The incarnation of the Lord, and hero of the Ramayana (avoid using the variant 'Ram' for obvious reasons).
Ramayana	Ramayan	The Hindu epic that relates the story of Rama and Sita, composed by the sage Valmiki thousands of years ago.
Ramnavami	Ramnavmi	The birthday festival of Rama.
Rig Veda	Rg or Rc Veda	The first scripture of Hinduism, containing spiritual and scientific knowledge.
Rishi	Rsi, risi	A spiritually wise person. More specifically, one of the seven seers who received the divine wisdom.
Sadhana	Sadhan	One's regulated spiritual practices or discipline.
Sadhu	Saddhu	Holy man, ascetic.



PREFERRED FORM	MAIN VARIANT	EXPLANATION
Sama Veda		The Veda of chanting; material mainly from the Rig Veda, arranged for ritual chanting in worship.
Samsara	Sansara	The world - the place where transmigration (the soul's passage through a series of lives in different species) occurs.
Samskar	Sanskar, Samskara	Sacraments designed to initiate a new stage of life. There is usually a total of sixteen such rites of passage (though many schools of thought do not practise them all).
Sanatan Dharma		The eternal or imperishable religion; also known as Vedic Dharma. Adherents often prefer this term to Hinduism since it characterises their belief in the revealed and universal nature of religion.
Sannyasa		The state of renunciation, the fourth stage of life.
Sannyasin	Samyasin, Samnyasin	A renunciate who, having given up worldly affairs and attachments, has entered the fourth stage of life, often as a mendicant.
Sanskrit		Sacred language of the Hindu scriptures.
Saraswati		The power of knowledge, often represented by the goddess Saraswati , the goddess of learning.
Sattva	Sattwa	<i>Goodness</i> , or the potency to sustain and nourish; one of the three gunas.
Seva	Sewa	Service, either to the divine or to humanity.
Shaivism	Saivism	The religion of Hindus who are devotees of Shiva .
Shakti	Sakti	Energy or power, especially of a Hindu feminine deity.
Shiva	Siva (many variants – even Civa - have been found).	<i>A Hindu god</i> . The name means kindly or auspicious



PREFERRED FORM	MAIN VARIANT	EXPLANATION
Shivaratri	Sivaratri	The annual festival celebrated in February/March in honour of Shiva . Also called Mahashivaratri.
Shraddha	Shraddha	Ceremony in which sanctified food is offered to the poor and needy in memory of departed ancestors.
Shri	Sri	<i>Illustrious</i> . Used as a title of respect, eg, Shri Krishna. Also a respectful title for men. The feminine form is Shrimati (Mrs).
Smriti	Srti	<i>That which is remembered</i> . Scriptures less ancient than the Vedas . Includes the Ramayana & Mahabharata .
Sita	Seeta	The divine consort of Rama .
Shruti	Srti, Sruti	<i>That which is heard</i> . A term specifically applied to the four Vedas , including the Upanishads .
Sutra	Sutta	Short sayings or verses relating to various rituals, or encapsulating profound philosophical meaning.
Swami	Svami	<i>Controller</i> . Sometimes, more specifically, Goswami (one who can control his/her senses). An honorific title applied to a religious teacher or holy person, particularly the sannyasi .
Swastika	Svastika	From the Sanskrit for well-being; a mark of good fortune. The four arms signify the four directions (space), the four Vedas (knowledge), and the four stages (time) in the life cycle. Not to be confused with the Nazi symbol.
Tamas		Ignorance or destructive potency; the lowest of the three gunas.
Trimurti		The three deities. Refers to Brahma , Vishnu and Shiva , who personify and control the three gunas . They



PREFERRED FORM	MAIN VARIANT	EXPLANATION
		represent and control the three functions of creation, preservation and destruction. 'Trinity' should be avoided.
Upanayana		Ceremony when the sacred thread is tied – to mark the start of learning with a guru.
Upanishad	Upanisad	<i>To sit down near.</i> A sacred text based on the teaching of a guru to a disciple. The Upanishads explain the teachings of the Vedas .
Vaishnavism	Vaisnavism	The religion of Hindus who are devotees of the god Vishnu .
Vaishya	Vaisya	The third of the four varnas of Hindu society, composed of merchants and farmers.
Vanaprastha		The third stage of life, typified by retirement and asceticism.
Vanaprasthi	Vanaprastha	<i>Forest dweller.</i> One who is in the third stage of life.
Varanasi	Kashi, Kasi	Banares, Benares, City on the river Ganges, sacred to Shiva . It is one of the holiest pilgrimage sites and also an ancient centre of learning.
Varna		<i>Colour.</i> The four principal divisions of Hindu society. It is important to note that the word 'caste' refers strictly to sub-divisions within each varna , and not to varnas themselves.
Varnashrama	Varnasrama	Dharma. The system whereby society is divided into four varnas (divisions) and life into four ashramas (stages).
Varsha Pratipada		The day of Creation, celebrated as New Year's Day by many Hindus.
Veda		<i>Knowledge.</i> Specifically refers to the four Vedas , though any teaching which is consistent with the



PREFERRED FORM	MAIN VARIANT	EXPLANATION
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Vijay Dashmi	Vijaya Dashami	conclusions of these scriptures is also accepted as Vedic. Another name for Dassehra .
Vishnu	Visnu	A Hindu god. With Brahma and Shiva forms the Trimurti
Vrat	Vratam	Vow. Often including abstention from certain foods
Vrindavan	Brindavan Vrindavana, Brindaban	The sacred village connected with Krishna's pastimes as a youth.
Yajur Veda		One of the four Vedas , dealing with the knowledge of Karma .
Jamuna	Jamuna, Jumna	Tributary of the river Ganga (Ganges) considered by many Hindus to be the most sacred of all holy rivers.
Yatra	Jatra	Pilgrimage. Usually to important sacred places in India.
Yoga		Communion; union of the soul with Supreme, or a process which promotes that relationship. The English word 'yoke' is derived from yoga.
Yuga		Age, or extended period of time, of which there are four.



PREFERRED FORM	EXPLANATION
Agnosticism	The belief that we cannot know for certain whether or not any god or gods exist
Atheism	The absence of belief in the existence of any god or gods, or living one's life as though there were no gods
Celebrant (Humanist)	A person who writes and conducts humanist ceremonies (e.g. namings, weddings, funerals)
Ceremonies (Humanist)	Personal and meaningful non-religious ceremonies (e.g. namings, weddings, funerals) conducted by a humanist celebrant: https://humanism.org.uk/ceremonies/
Consequentialism	The belief that the goodness of an action depends on its consequences (not all humanists are consequentialists but many will argue that consequences need to be taken into account when considering how we should act)
Democracy	A system in which every person has a say in how a society should be organised and run, not just a powerful few
Dialogue	Engagement between people with different approaches to life to build mutual understanding, identify common ground and, where it makes sense, engage in shared action.
Dignity	Being of value and worthy of respect (e.g. treating someone with dignity is to take their rights and wishes into account in how we treat them)
Doubt	To remain sceptical about the truth of a claim (normally due to the absence of persuasive evidence)
Empathy	The natural capacity to recognise, understand, and share the feelings of others, and can therefore support us in considering how we should treat others



PREFERRED FORM	EXPLANATION
Equality	The goal that everyone should receive equal treatment and opportunities regardless of their gender, race, religion or belief, sexual orientation, disabilities, age, or marital status
Evidence	The available body of facts or information indicating whether a belief or claim is true
Evolution by natural selection	The scientific theory introduced by Charles Darwin that all life, including human beings, have evolved naturally over millions of years
Page 68 Fallibility	The tendency to make mistakes or be wrong
Page 68 Flourishing	To live a happy, personally meaningful, and fulfilling life
Freedom of thought, belief, and religion	The right to decide for oneself what one believes. This right includes freedom to change one's religion or belief. (For many humanists it includes the freedom to form one's own beliefs through a broad and balanced education.)
Freedom of expression	The right of every individual to hold opinions without interference and to seek, receive and impart information and ideas
Golden Rule	To treat other people the way you would wish to be treated. To not treat other people in a way that you would not wish to be treated.
Good life	To live a happy, personally meaningful, and flourishing life (there is no one single answer to what makes a good life)
Happy human	The symbol used by many humanist organisations to represent humanism (designed by Dennis Barrington in 1965): http://happyhuman50th.org.uk/



PREFERRED FORM	EXPLANATION
Humanity	(i) All human beings collectively. (ii) The quality of showing compassion, kind-heartedness, and respect for others.
Human rights	Moral principles that describe standards of how human beings should be treated. They are commonly understood to be held simply in virtue of being a human being.
Liberty	The state of being free within society from oppressive restrictions imposed by authority on one's behaviour or beliefs
Mortality	The state in which death is the end of one's personal identity
Naturalism	The belief that there are only natural laws and forces (as opposed to supernatural)
The One Life	Seeking to make the best of the one life we know we have, by creating meaning and purpose, finding happiness, and supporting others to do the same
Personal autonomy	The capacity and freedom to decide for oneself how one is going to live and the course of action one wishes to pursue
Quality of life	That which makes a life feel worth living, e.g. health, happiness, relationships, freedom, potential (this is important for humanists when considering ethical questions, e.g. assisted dying)
Reason	The capacity for consciously making sense of things, establishing and verifying facts, applying logic, and changing or justifying practices and beliefs based on new or existing information



PREFERRED FORM	EXPLANATION
Rationalism	The practice or principle of basing opinions and actions on reason, science, and verifiable evidence, rather than on religious belief or emotional response
Responsibility	(i) The state of being responsible for one's own destiny and the choices one makes. (ii) The state of being responsible when making decisions about how to act for taking into consideration the needs and wishes of other people, animals, and the environment
Respect	To show regard for something's qualities (e.g. for a human being's feelings)
Scepticism	To approach knowledge from a position that recognises we are capable of making mistakes when deciding what we believe is true and to therefore begin from a position of doubt when it comes to extraordinary claims
Science	The intellectual and practical activity that seeks truth through the systematic study of the structure and behaviour of the natural world through observation and experiment, an enterprise that builds and organises knowledge in the form of testable explanations and predictions
Secularism	The principle that state institutions are separate from religious institutions, the state is neutral on matters of religion or belief, and the guarantees the freedom of belief for all. In such a state, no one should be privileged nor disadvantaged on grounds of their religious or non-religious beliefs.
Shared human values	The almost universal values shared by human beings that can support us to judge whether an action is right or wrong



PREFERRED FORM

EXPLANATION

ﷺ - This Arabic ‘logo-type’ is composed of the words ‘Salla-llahu alaihi wa sallam’ - peace and blessings of Allah upon him. They are used by Muslims every time the Prophet Muhammad ﷺ is mentioned. Similar respect is accorded to the other Prophets. The Qur’an was revealed in Arabic, therefore Arabic is the language of Islam, Islamic worship, theology, ethics and jurisprudence. Islam is inextricably linked with the Arabic language despite the variety of languages spoken by the believers. For British teachers and pupils who have not encountered Islamic terms, this transliteration is a simplified version of that used by contemporary scholars. An apostrophe is used to indicate a pause. The reader will note that the words salah and zakah end in ‘h’ when they appear alone. When part of a phrase, these words are written with a ‘t’ at the end, eg Salat-ul-Zuhr, Zakat-ul-Fitr, as a guide to pronunciation.

<p>Abd Abu Bakr Adam Adhan Aishah Aakhirah Akhlaq al-Amin al-Aqsa al-Fatihah al-hamdu-li-Llah al-Kafi</p>	<p><i>Servant.</i> As in Abdullah, servant of Allah.</p> <p>The first Khalifah, successor to the leadership of the Muslim community after the death of the Prophet Muhammad ﷺ.</p> <p>Adam (peace be upon him). The first man, and first Prophet of Allah.</p> <p>Call to prayer. From the same root, Mu’adhin (one who makes the call to prayer).</p> <p>One of the wives of the Prophet Muhammad ﷺ, and daughter of Abu Bakr (Radhi-Allahu-anhum – <i>may Allah be pleased with them</i>).</p> <p>Everlasting life after death – the hereafter.</p> <p>Conduct, character, attitudes and ethics.</p> <p><i>The Trustworthy.</i> The name by which Prophet Muhammad was generally known, even before the revelation of Islam.</p> <p><i>Masjid-ul-Aqsa (The Farthest Mosque) in Jerusalem, located near the Dome of the Rock.</i></p> <p><i>The Opener. Surah 1 of the Qur’an. Recited at least 17 times daily during the five times of salah. Also known as ‘The Essence’ of the Qur’an.</i></p> <p><i>The Opener. Surah 1 of the Qur’an. Recited at least 17 times daily during the five times of salah. Also known as ‘The Essence’ of the Qur’an.</i></p> <p><i>The title of the books of Hadith compiled by Muhammad ibn-Yaqub Koleini, a Shi’ah scholar.</i></p>
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PREFERRED FORM	EXPLANATION
al-Khulafa-ur-Rashidun	<i>The Rightly Guided Khalifahs. The first four successors to the leadership role the Prophet Muhammad. They were Abu Bakr, Umar, Uthman and Ali (Radhi-Allahu-anhum - may Allah be pleased with them).</i>
al-Madinah	<i>Madinatu'n Nabi (The City of the Prophet). The name given to Yathrib after the Prophet Muhammad migrated there in 622 CE and founded the first Islamic state.</i>
Ali	<i>Cousin and son-in-law of the Prophet Muhammad ﷺ; husband of Fatimah Zahrah; father of Hassan, Hussein, and Zainab; the fourth of 'al-Khulafa ur-Rashidun' according to Sunnis, and the first successor accepted by Shi'ah Islam (Radhi-Allahu-anhum - may Allah be pleased with them).</i>
Allah	<i>The Islamic name for God in the Arabic language. Used in preference to the word God, this Arabic term is singular, has no plural, nor it is associated with masculine, feminine characteristics</i>
Allahu Akbar	<i>Allah is most great.</i>
Angels	<i>Beings created by Allah from light. They have no free will and are completely obedient to Allah.</i>
Ansar	<i>Supporters. The Muslims of al-Madinah, who welcomed, helped and supported the Muslims who migrated from Makkah.</i>
Arafat	<i>A plain, a few kilometres from Makkah, where pilgrims gather to worship, forgiveness. This takes place on the ninth day of the Islamic month of Dhul-Hijjah, the day before Id-ul-Adha.</i>
Asr (Salat-ul-Asr)	<i>Mid-afternoon salah which may be performed from late afternoon until a short while before sunset.</i>
As-Salamu-Alaykum	<i>Peace be upon you. An Islamic greeting.</i>
Ayah (sing.)	<i>A unit within a Surah of the Qur'an.</i>
Barakah	<i>Blessings</i>
Bilal	<i>The first Mu'adhin of Islam (see Adhan), a companion of Prophet Muhammad, formerly an Abyssinian slave (Radhi-Allahu-anhu - may Allah be pleased with him).</i>
Bismillah	<i>In the name of Allah.</i>



PREFERRED FORM	EXPLANATION
Bismillah-ir-Rahman-ir- Rahim	<i>In the name of Allah - All Gracious, All Merciful. The preface to all Surahs of the Qur'an except the ninth one. It is usually said by Muslims before eating or beginning any action.</i>
Dar-ul-Islam	<i>House or abode of Islam. Sometimes used to refer to lands ruled by Islamic Shari'ah.</i>
Da'wah	<i>Call. Inviting people to Islam, whether by literal invitation and preaching, or by the example of good actions.</i>
Dawud	<i>David (peace be upon him). A Prophet of Allah to whom the Zabur (the Book of Psalms) was given.</i>
Dhikr	<i>Remembrance. Remembrance of Allah in one's heart or by reciting His names or sections from the Qur'an.</i>
Dhimmi	<i>A non-Muslim living freely under the protection of an Islamic state.</i>
Dhul-Hijjah	<i>The month of the Hajj, last month of the Islamic year.</i>
Din	<i>Way of life, religion together with its practices.</i>
Din-ul-Fitrah	<i>A description of Islam as the natural way of life.</i>
Du'a	<i>Varying forms of personal prayer and supplication.</i>
Fajr (Salat-ul-Fajr)	<i>Dawn salah which may performed from dawn unit just before sunrise.</i>
Fard	<i>Obligatory duty according to divine law, eg, offering salah five times a day.</i>
Fatihah	<i>See al-Fatihah.</i>
Fatimah (al-Zahrah)	<i>Daughter of the Prophet Muhammad; wife of Ali; mother of Hassan, Hussein and Zainab (Radhi-Allahu-anhum – may Allah be pleased with them).</i>
Fatwa	<i>The legal guidance of a pious, just, knowledgeable Muslim scholar and jurist, based on the Qur'an, Sunnah and Islamic Shari'ah.</i>
Fiqh	<i>Understanding. Islamic jurisprudence</i>
Ghusl	<i>Greater ablution. Formal washing of the whole body prior to worship (see Wudu).</i>



PREFERRED FORM	EXPLANATION
Hadith	<i>Saying; report; account. The sayings of the Prophet Muhammad, as recounted by his household, progeny and companions. These are a major source of Islamic law. Some Hadith are referred to as Hadith Qudsi (sacred Haddith) having been divinely communicated to the Prophet Muhammad.</i>
Hafiz	<i>Someone who knows the whole Qur'an by heart.</i>
Hajar	<i>Hagar. Wife of the Prophet Ibrahim, and mother of the Prophet Isma'il (peace be upon them).</i>
Hajj	<i>Annual pilgrimage to Makkah, which each Muslim must undertake at least once in a lifetime if he or she has the health and wealth. A Muslim male who has completed Hajj is called Hajji, and a female, Hajjah.</i>
Halal	<i>Any action or thing which permitted or lawful</i>
Haram	<i>Anything unlawful or not permitted.</i>
Haram Sharif	<i>The grand mosque in Makkah, which encompasses the Ka'bah, the hills of Safa and Marwah and the well of Zamzam.</i>
Hijab	<i>Veil. Often used to describe the head scarf or modest dress worn by women, who are required to cover everything except face and hands in the sight of anyone other than immediate family.</i>
Hijrah	<i>Departure; exit; emigration. The emigration of the Prophet Muhammad from Makkah to Madinah in 622 CE. The Islamic calendar commences from this event.</i>
Hira	<i>The name of a place near Makkah, where the Prophet Muhammad went for solitude and worship. It was there that he received the first revelation of the Qur'an.</i>
Ibadah	<i>All acts of worship. Any permissible action performed with the intention to obey Allah.</i>
Iblis	<i>The Jinn who defied Allah by refusing to bow to Adam (peace be upon him), and later became the tempter of all human beings (see Shaytan).</i>
Ibrahim	<i>Abraham (peace be upon him). A Prophet of Allah to whom the 'scrolls' were given.</i>
Id	<i>Recurring happiness. A religious holiday; a feast for thanking Allah and celebrating a happy occasion.</i>
Id Mubarak	<i>Id blessings! Greeting exchanged during Islamic celebrations.</i>



PREFERRED FORM	EXPLANATION
Id-ul-Adha	<i>Celebration of the sacrifice, commemorating the Prophet Ibrahim's willingness to sacrifice his son Isma'il for Allah (peace be upon them). Also known as Id-ul-Kabir - the Greater Id - and Qurban Bayram (Turkish) feast of sacrifice.</i>
Id-ul-Fitr	<i>Celebration of breaking the fast on the day after Ramadan ends, which is also the first day of Shawal, the tenth Islamic month. Also known as Id-ul-Saghir - the Lesser Id - and Sheker Bayram (Turkish) - sugar feast.</i>
Ihram	<i>The state or condition entered into to perform either Hajj or Umrah. During this period, many normally permitted actions are placed out of bounds to Muslims. Also, the name of the two plain white unsewn cloths worn by male pilgrims to indicate the brotherhood, equality and purity of the pilgrim. For women, the dress of Ihram consists of their normal modest clothing.</i>
Ijma	<i>General consensus of scholars, expressed or tacit, on matters of law and practice.</i>
Imam	<i>Leader. A person who leads the communal prayer, or a founder of an Islamic school of jurisprudence. In Shi'ah Islam, Imam is also the title of Ali (Radhi-Allahu-anhu - may Allah be pleased with him) and his successors.</i>
Imamah	<i>Office and function of an Imam. Religious authority in Shi'ah Islam; successor to the Prophet Muhammad as leader of the Muslim community.</i>
Injil	<i>Gospel. A book given to Prophet Isa (peace be upon him).</i>
Iqamah	<i>Call to stand up for salah.</i>
Isa	<i>Jesus. A Prophet of Allah, born of the virgin Mary (peace be upon them).</i>
Isha (Salat-ul-Isha)	<i>Evening salah which may be performed from just over an hour after sunset, until midnight.</i>
Islam	<i>Peace attained through willing obedience to Allah's divine guidance.</i>
Isma'il	<i>Ishmael. A Prophet of Allah. Son of the Prophet Ibrahim and Hajar (peace be upon them).</i>
Isnad	<i>Chain of transmission of each Hadith.</i>
Jibril	<i>Gabriel. The angel who delivered Allah's messages to His Prophets.</i>



PREFERRED FORM	EXPLANATION
Jihad	<i>Personal individual struggle against evil in the way of Allah. It can also be collective defence of the Muslim community.</i>
Jinn	<i>Being created by Allah from fire.</i>
Jumu'ah (Salat-ul-Jumu'ah)	<i>The weekly communal salah, and attendance at the khutbah performed shortly after midday on Fridays.</i>
Ka'bah	<i>A cube-shaped structure in the centre of the grand mosque in Makkah. The first house built for the worship of the One True God.</i>
Khadijah	<i>First wife of the Prophet Muhammad. Mother of Fatimah Zahrah (Radhi- Allahu-anhum - may Allah be pleased with them).</i>
Khalifah	<i>Successor; inheritor; custodian; vice-regent (see al-Khulafa-ur-Rashidun).</i>
Khilafah	<i>The institution of the Khalifah.</i>
Khums	<i>Contribution (additional to zakah) of one fifth of surplus annual income paid by Shi'ah Muslims. Sunni Muslims only apply Khums to booty.</i>
Khutbah	<i>Speech. Talk delivered on special occasions such as the Jum'uah and Id prayers.</i>
Laylat-ul-Qadr	<i>The Night of Power, when the first revelation of the Qur'an was made to Prophet Muhammad. It is believed to be one of the last ten nights of Ramadan.</i>
Madinah	<i>See al-Madinah.</i>
Maghrib (Salat-ul-Maghrib)	<i>Sunset salah which is performed after sunset until daylight ends.</i>
Mahdi, al-Muntazar	<i>The (rightly) guided one who is awaited and will appear towards the end of time to lead the Ummah and restore justice on Earth. The one who is promised in the Judaic, Christian and Islamic traditions.</i>
Makkah	<i>City where the Prophet Muhammad was born, and where the Ka'bah is located.</i>
Maryam	<i>Mary. The virgin mother of the Prophet Isa (peace be upon them).</i>
Masjid	<i>Place of prostration. Mosque.</i>



PREFERRED FORM	EXPLANATION
Mihrab	<i>Niche or alcove in a mosque wall, indicating the Qiblah - the direction of Makkah, towards which all Muslims face to perform salah.</i>
Mina	<i>Place near Makkah, where pilgrims stay on the 10th, 11th and 12th of Dhul-Hijjah and perform some of the activities of the Hajj.</i>
Minbar	<i>Rostrum; platform; dais. The stand from which the Imam delivers the khutbah or speech in the mosque or praying ground.</i>
Miqat	<i>Place appointed, at which pilgrims enter into the state of ihram.</i>
Mi'raj	<i>The ascent through the heavens of the Prophet Muhammad.</i>
Mu'adhin	<i>Caller to prayer (see Adhan). Known in English as 'muezzin'.</i>
Muhammad	<i>Praised. Name of the final Prophet.</i>
Muharram	<i>First month in the Islamic calendar, which is calculated from the time the Prophet Muhammad migrated to Yathrib (Madinah).</i>
Musa	<i>Moses (peace be upon him). A Prophet of Allah to whom the Tawrah (Torah) was given.</i>
Mumin	<i>Faithful. A believer, a practising Muslim who wholeheartedly yields to Allah's guiding wisdom and is thus in harmony with His will and at peace with himself and fellow creatures.</i>
Muslim	<i>One who claims to have accepted Islam by professing the Shahadah.</i>
Muzdalifah	<i>Place where pilgrims on Hajj stop for a time during the night of the day they spend at Arafat.</i>
Nabi	<i>Prophet of Allah.</i>
Niyah	<i>Intention. A legally required statement of intent, made prior to all acts of devotion such as salah, Hajj or sawm.</i>
Qadar	<i>Allah's complete and final control over the fulfilment of events or destiny.</i>



PREFERRED FORM	EXPLANATION
Qiblah	<i>Direction which Muslims face when performing salah - towards the Ka'bah see Mihrab).</i>
Qur'an	<i>That which is read or recited. The Divine Book revealed to the Prophet Muhammad. Allah's final revelation to humankind.</i>
Rak'ah	<i>A unit of salah, made up of recitation, standing, bowing and two prostrations.</i>
Ramadan	<i>The ninth month of the Islamic calendar, during which fasting is required from just before dawn until sunset, as ordered by Allah in the Qur'an.</i>
Rasul	<i>Messenger of Allah.</i>
Sa'y	<i>Walking and hastening between Safa and Marwah, as part of the Hajj, in remembrance of Hajar's search for water for her son Isma'il (peace be upon them).</i>
Sadaqah	<i>Voluntary payment or good action for charitable purposes.</i>
Safa & Marwah	<i>Two hills in Makkah, near the Ka'bah, now included within the grand mosque (see Sa'y).</i>
Sahih al-Bukhari	<i>The title of the books of Hadith compiled by Muhammad ibn Isma'il al- Bukhari, a Sunni scholar. The collection is described as Sahih (authentic).</i>
Sahih Muslim	<i>The title of the books of Hadith compiled by Abul Husayn Muslim ibn al-Hajjaj, a Sunni scholar. The collection is described as Sahih (authentic).</i>
Salah	<i>Prescribed communication with, and worship of, Allah, performed under specific conditions, in the manner taught by the Prophet Muhammad, and recited in the Arabic language. The five daily times of salah are fixed by Allah.</i>
Sawm	<i>Fasting from just before dawn until sunset. Abstinence is required from all food and drink (including water) as well as smoking and conjugal relations.</i>
Shahadah	<i>Declaration of faith, which consists of the statement, 'There is no god except Allah, Muhammad is the Messenger of Allah'.</i>
Shari'ah	<i>Islamic law based upon the Qur'an and Sunnah.</i>



PREFERRED FORM	EXPLANATION
Shaytan	<i>Rebellious; proud. The devil (see Iblis).</i>
Shi'ah	<i>Followers. Muslims who believe in the Imamah, successorship of Ali (Radhi- Allahu-anhu - may Allah be pleased with him) after the Prophet Muhammad and 11 of his most pious, knowledgeable descendants.</i>
Shirk	<i>Association. Regarding anything as being equal or partner to Allah. Shirk is forbidden in Islam.</i>
Shura	<i>Consultation of the people in the management of religious and worldly affairs. A duty prescribed in the Qur'an to leaders at all levels, from family to government.</i>
Sirah	<i>Biographical writings about the conduct and example of the Prophet Muhammad.</i>
Subhah	<i>String of beads used to count recitations in worship.</i>
Sunnah	<i>Model practices, customs and traditions of the Prophet Muhammad. This is found in both Hadith and Sirah.</i>
Sunni	<i>Muslims who believe in the successorship of Abu Bakr, Umar, Uthman and Ali (Radhi-Allahu-anhum - may Allah be pleased with them) after the Prophet Muhammad.</i>
Surah	<i>Division of the Qur'an (114 in all).</i>
Takbir	<i>Saying 'Allahu Akbar!' Recited during salah, Id and other celebratory occasions.</i>
Tawaf	<i>Walking seven times around the Ka'bah in worship of Allah. Also, a part of Hajj and Umrah.</i>
Tawhid	<i>Belief in the Oneness of Allah - absolute monotheism as practised in Islam.</i>
Tawrah	<i>The Torah. The book given to the Prophet Musa (Moses) (peace be upon him).</i>
Ulama	<i>Scholars of Islamic law and jurisprudence (sing. Alim).</i>
Umar ibn ul-Khattab	<i>Second Khalifah of Islam.</i>
Ummah	<i>Community. World-wide community of Muslims; the nation of Islam.</i>
Umrah	<i>Lesser pilgrimage which can be performed at any time of the year.</i>
Uthman	<i>The third Khalifah of Islam.</i>



PREFERRED FORM	EXPLANATION
Wudu	<i>Ablution before salah.</i>
Yathrib	<i>Town to which the Prophet Muhammad migrated from Makkah (see al-Madinah).</i>
Zabur	<i>The Book of Psalms given to Prophet Dawud (David) (peace be upon him).</i>
Zakah	<i>Purification of wealth by payment of annual welfare due. An obligatory act of worship.</i>
Zakat-ul-Fitr	<i>Welfare payment at the end of Ramadan.</i>
Zamzam	<i>Name of the well adjacent to the Ka'bah in Makkah. The water first sprang in answer to Hajar's search and prayers (see Hajar and Sa'y).</i>
Zuhr (Salat-ul-Zuhr)	<i>Salah which can be performed after midday until afternoon.</i>



PREFERRED FORM	MAIN VARIANT	EXPLANATION
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Most of the terms included in this section are Hebrew in origin. However, since the Jewish diaspora, many terms reflect the different countries where Jews have settled. For example, many words are in Yiddish, a common language (a mixture of German, Russian and Hebrew) developed by Jews throughout Central and Eastern Europe. The preferred form in this glossary uses the Sephardic pronunciation, which is equivalent to Modern Hebrew as spoken in Israel today. As with all transliterations, there may be acceptable differences in the ways in which words are spelt.

Afikomen (Greek)		<i>Dessert.</i> Portion of a matzah eaten near the end of the Seder .
Agadah	Aggadah	<i>Telling.</i> Rabbinical teachings on moral values.
Aleinu		Key prayer at the conclusion of each service.
Aliyah		<i>To go up.</i> (i) Being called to read the Sefer Torah in the synagogue . (ii) The migration of Jews to Israel .
Amidah		<i>Standing.</i> The standing prayer said in silence during all services. Contains 18 blessings but with variations on Shabbat and festivals.
Aron Hakodesh		<i>Holy Ark.</i> The focal point of the synagogue , containing Torah scrolls.
Ashkenazim		Jews of Central and Eastern European origin.
Bar Mitzvah		<i>Son of Commandment.</i> A boy's coming of age at 13 years and a day, usually celebrated in the synagogue on the Shabbat following his Jewish birthday by the boy receiving his first Aliyah and often actually reading from the Torah and the weekly's reading from the profits. Some will also lead part or all of the service.
Bat Mitzvah	Bat Chayil	<i>Daughter of Commandment.</i> As above, but for girls from 12 years old. May be marked differently between communities.
Bet ha Knesset	Beit ha Knesset; Shul	<i>House of Assembly.</i> Synagogue .
Bimah		<i>Dais.</i> Raised platform primarily for reading the Torah in the synagogue . Where the leader of the service stands
Brit Milah	Berit Milah, Bris	<i>Covenant of Circumcision.</i> See <i>Circumcision</i> below.



PREFERRED FORM	MAIN VARIANT	EXPLANATION
Challah	Hallah	<i>Enriched bread used particularly on Shabbat and during festivals.</i>
Chazan	Hazan	<i>Cantor Leader of reading, singing and chanting in the services of some synagogues.</i>
Chumash		<i>Five. The Torah in book form, used in the synagogue and the home. Printed in Hebrew with vowels, punctuation and notes. Also usually with English translation and commentary.</i>
Circumcision		<i>Religious rite of Brit Milah, performed by a qualified mohel on all Jewish boys, on the eighth day after birth unless the infant is not well enough for the procedure.</i>
Gemara		<i>Gemarah Commentary on the Mishnah included in the Talmud.</i>
Genizah		<i>Storage place for damaged religious texts.</i>
Haftarah		<i>Completion. Passages from Nevi'im (Prophets) read in the synagogue (linked to weekly Torah and festival readings).</i>
Hagadah	Haggadah	<i>Telling. A book used at Seder.</i>
Halakhah	Halacha	<i>The Way. Jewish Laws. The code of conduct encompassing all aspects of Jewish life.</i>
Hanukiah	Chanukiah; Menorah	<i>Nine-branched Hanukkah lamp used at the festival of Hannukah</i>
Hannakah	Chanukah	<i>Dedication. An eight-day festival of lights to celebrate the re-dedication of the temple following the Maccabean victory over the Greeks.</i>
Hasid	Chasi; Hasidim (pl.); Chasidim	<i>Pious. Member of the Orthodox movement of Hasidism</i>
Hasidism	Chasidism	<i>A religious and social movement formed by Israel Baal Shem Tov (from the 18th century onwards).</i>
Havdalah		<i>Distinction. Ceremony marking the conclusion of Shabbat.</i>



PREFERRED FORM	MAIN VARIANT	EXPLANATION
Hebrew	Ivrit	<i>Ancient Semitic language; language of the Tenakh (Hebrew-Scriptures) and used by Jews for prayer and study. Also, everyday language in Israel. - modern Hebrew is known as Ivrit.</i>
Huppah	Chuppah	<i>Canopy used for a wedding ceremony, under which the bride and groom stand.</i>
Israel		<i>One who struggles with God. The phrase refers to the world-wide Jewish community; the land of Israel and the modern state of Israel. The name given by G-d to Jacob. Hence the term Children of Israel for the Jewish people.</i>
Kabbalah	Cabala	<i>Jewish mysticism.</i>
Kaddish		<i>Prayer publicly recited by mourners.</i>
Kashrut		<i>Laws relating to keeping a kosher home and lifestyle.</i>
Ketubah	Kettubah Ketuvim (pl)	<i>Document that defines rights and obligations within Jewish marriage. The Jewish marriage certificate which may have a decorative design.</i>
Kibbutz	Kibbutzim (pl.)	<i>Israeli collective village based on socialist principles.</i>
Kiddush		<i>Holy. A prayer sanctifying Shabbat and festival days, usually recited over wine or grape juice. Recited at the dinner table before the evening meal and another version before the midday meal.</i>
Kippah	Yamulkah; Capel	<i>Skull cap head covering worn by males during prayers, Torah study, etc. Orthodox males wear it constantly when awake.</i>
Knesset		<i>Assembly. Israeli parliament.</i>
Kol Nidrei	Kol Nidre	<i>All vows. Prayer recited on the evening of Yom Kippur.</i>
Korach		<i>Name of the leader who defied Moses in the wilderness</i>
Kosher	Kasher	<i>Fit; proper. Foods permitted by Jewish dietary laws. Also used to refer to items such as mezuzah or Torah Scroll that are fit for use.</i>
Ladino		<i>Language used predominately by Sephardim.</i>



PREFERRED FORM	MAIN VARIANT	EXPLANATION
Magen David		<i>Shield of David, popularly called Star of David. The 6 point star.</i>
Maimonides		<i>Rabbi Moses ben Maimon (1135-1204), a leading Jewish philosopher, medical writer and codifier of Jewish law.</i>
Mashiach	Moshiach; Messiah	<i>The anointed one who will herald in a new era for Judaism and all humankind.</i>
Matzah	Matzot (pl.)	<i>Flat cracker-like bread which has been baked before it rises; used at Pesach.</i>
Menorah		<i>Seven-branched candelabrum which was lit daily in the Temple initially by Aaron and then by the Cohanim.</i>
Mezuzah		<i>A small scroll placed on doorposts of Jewish homes, containing two paragraphs from the Torah hand written on parchment as the Torah. Enclosed in a metal; glass; wood or plastic case which is often decorative.</i>
Mikveh		<i>Ritual bath used for the immersion of people and objects.</i>
Minyan		<i>Quorum of ten men, over Bar Mitzvah age, required for a full service. Progressive communities may include women but do not always require a minyan.</i>
Mishnah		<i>First writing down of the Oral Tradition. An authoritative document forming part of the Talmud, codified about 200 CE.</i>
Mishkan		<i>Dwelling. The original travelling sanctuary used prior to the building of the permanent Temple in Jerusalem.</i>
Mitzvah	Mitzvot (pl.)	<i>Commandment. The Torah contains 613 Mitzvot. Commonly used to describe good deeds.</i>
Mohel		<i>Person trained to perform Brit Milah.</i>
Moshav	Moshavim (pl.)	<i>Collective village or farm in Israel.</i>
Ner Tamid		<i>Eternal light. The perpetual light above the Aron Hakodesh.</i>
Nevi'im		<i>Prophets. Second section of the Tenakh.</i>



PREFERRED FORM	MAIN VARIANT	EXPLANATION
Noachide Laws		<i>Seven laws given to Noah after the flood, which are incumbent on all humankind. These laws form the foundation for a just society.</i>
Parev	Parveh	<i>Neutral foods, which are neither milk nor meat, eg, vegetables, eggs, fish.</i>
Pesach	Passover	<i>Festival commemorating the Exodus from Egypt. One of the three biblical pilgrim festivals. Pesach is celebrated in the spring.</i>
Pikei Avot	Pirke Avoth	<i>Ethics of the Fathers. Part of the Mishnah containing ethics of Rabbinical sages in six chapters, read one per week at the end of the afternoon service each Shabbat from the end of Pesach to Rosh Hashanah.</i>
ט kuakh Nefesh		<i>Save a soul. The setting aside of certain laws in order to save a life.</i>
ס ogrom		<i>Organised attack on Jews, especially frequent in 19th and early 20th century Eastern Europe.</i>
פ urim		<i>Festival commemorating the rescue of Persian Jewry as told in the book of Esther.</i>
Rabbi		<i>My teacher. An ordained Jewish teacher. Often the religious leader of a Jewish community.</i>
Rashi		<i>Rabbi Shlomo ben Yitzhak (1040 -1105). A French rabbinical scholar and leading commentator on the Torah and Talmud.</i>
Rebbe		<i>Rabbi. The term used by Hasidim for their religious leader.</i>
Rosh Hashanah	Rosh Ha-Shanah	<i>Head of the Year. Jewish New Year.</i>
Seder		<i>Order. A home-based ceremonial meal in the first two nights of Pesach, at which the Exodus from Egypt is recounted using the Hagadah.</i>
Sefer Torah		<i>Torah scroll. The five books of Moses handwritten on parchment using a quill pen and rolled to form a scroll.</i>
Sephardim	Sefardim	<i>Jews originating from Mediterranean countries, especially Spain, North Africa and the Middle East.</i>



PREFERRED FORM	MAIN VARIANT	EXPLANATION
Shabbat	Shabbos	<i>Day of spiritual renewal and rest commencing at sunset on Friday, terminating at nightfall on Saturday.</i>
Shatnez	Shaatnez	<i>Garments containing a forbidden mixture of wool and linen.</i>
Shavuot		<i>Weeks. One of three pilgrim festivals. Shavuot is celebrated in the summer, seven weeks after Pesach. Also known as Pentecost as it is celebrated on the 50th day from the start of Pesach.</i>
Shekhina		<i>The divine presence.</i>
Shema		<i>Major Jewish prayer affirming belief in one God. The Shema is found in the Torah. and is said in the morning and evening services.</i>
Shemot		<i>Names. Seven holy names of God. The name of the 2nd book of the Torah.</i>
Shiva		<i>Seven days of intense mourning following the burial of a close relation. During this period, all ordinary work is prohibited.</i>
Shoah		<i>Desolation. The suffering experienced by European Jews at the hands of the Nazis, including the systematic murder of six million Jews between 1933 and 1945.</i>
Shofar		<i>Ram's horn blown during the morning service of Rosh Hashanah a total of one hundred notes per day. Also one blast at the end of the morning service each day during the Jewish month preceding Rosh Hashanah to herald in the New Year. It is not blown on Shabbat.</i>
Siddur		<i>Order. Daily prayer book.</i>
Simchat Torah		<i>Rejoicing of the law. Festival celebrating the completion and recommencement of the cycle of the weekly Torah reading occurring at the end of Sukkot.</i>
Sukkah	Sukkot (pl.)	<i>Tabernacle; booth. A temporary dwelling used during Sukkot</i>
Sukkot		<i>One of three biblical pilgrim (foot) festivals, Sukkot is celebrated in the Autumn. A harvest festival.</i>



PREFERRED FORM	MAIN VARIANT	EXPLANATION
Synagogue	Shul; Bet Haknesset; Bet Hamidrash	<i>Building for Jewish public prayer, study and assembly</i>
Tallit	Tallith	<i>Prayer shawl. Four-cornered garment with fringes (Tzitzis).</i>
Talmud		<i>Mishnah and Gemara, collected together.</i>
Tefillah	Tefila	<i>Self-judgement. Jewish prayer and meditation.</i>
Tefillin	Tephilin; T'filin; Phylacteries	<i>Small leather boxes containing passages from the Torah, strapped on the forehead and arm for morning prayers on weekdays.</i>
Tenakh	Tanakh	<i>The collected 24 books of the Jewish Bible, comprising three sections: Torah, Nevi'im, and Ketuvim (Te;Na;Kh).</i>
Teshuva		<i>Repentance. Returning to God.</i>
Tikkun Olam	Tikun	<i>Care for the world and environment.</i>
Torah		<i>Law; teaching. The Five Books of Moses.</i>
Tzedaka		<i>Righteousness. An act of charity.</i>
Tzitzit	Tzittit Tzitis	<i>Fringes on the corners of the Tallit. Also commonly refers to the fringed undervest worn by Jewish males.</i>
Yad		<i>Hand - pointer used in reading the Sefer Torah usually shaped like a hand with outstretched finger on the end.</i>
Yahrzeit		<i>Year-time. Anniversary of a death.</i>
Yeshiva		<i>College for study of the Torah and Talmud.</i>
Yiddish		<i>Language used predominantly by Ashkenazim. A combination of Hebrew and German.</i>
Yishuv		<i>Ingathering. The Jewish community of Israel.</i>
Yom Hashoah		<i>Day to commemorate the Shoah. The Jewish Holocaust Memorial Day set by the Israeli Parliament to be 5 days after the end of Pesach.</i>



PREFERRED FORM	MAIN VARIANT	EXPLANATION
Yom Kippur		<i>Day of Atonement. A twenty five hour fast day occurring on the tenth day after Rosh Hashanah; a solemn day of Tefillah and Teshuva. Starts at sunset the night before to nightfall.</i>
Zionism		<i>Political movement securing the Jewish return to the land of Israel.</i>



PREFERRED FORM

MAIN VARIANT

EXPLANATION

Sikh terms are drawn from the Punjabi language, and the versions below are based upon that language. Many of these terms will also be found in books on Hinduism and Buddhism but with somewhat different meanings. As with all transliterations, there are problems which are difficult to resolve. This is particularly true when moving from the Gurmukhi script, which has an alphabet of 35 letters, to the Roman alphabet, which has only 26 letters.

Names of persons and places are only included in this list if variant forms are commonly used.

Akal Purakh		<i>The Eternal One.</i> A designation frequently used of God by Guru Nanak .
Akal Takht	Akal Takhat	<i>Throne of the Eternal; throne of the Timeless One.</i> Building facing the Golden Temple in Amritsar, where Sikhs gather for political purposes.
Akhand Path		Continuous reading of the Guru Granth Sahib from beginning to end.
Amrit		<i>Nectar.</i> Sanctified liquid made of sugar and water, used in initiation ceremonies.
Amrit ceremony	Amrit Sanskar Amrit Pahul Khande di Pahul; Sometimes just 'Amrit' or 'Taking Amrit' ('Amrit Chhakna')	The Sikh rite of initiation into the Khalsa . 'Baptism' should not be used
Anand karaj	Anand Sanskar	<i>Ceremony of bliss.</i> Wedding ceremony.
Ardas		<i>Prayer.</i> The formal prayer offered at most religious acts.
Baisakhi	Vaisakhi	<i>A major Sikh festival celebrating the formation of the Khalsa, 1699 CE.</i>
Bangla Sahib		<i>The site of the martyrdom of Guru Har Krishan (Delhi).</i>
Bhai Khanaya		<i>A Sikh commended by Guru Gobind Singh for serving water to the enemy wounded.</i>



PREFERRED FORM	MAIN VARIANT	EXPLANATION
Bhai Lalo		<i>A humble carpenter who opened his house to Guru Nanak. The Guru preferred Bhai Lalo's simple food to the offerings of a local rich merchant.</i>
Chanani	Chandni	<i>Canopy over the scriptures, used as a mark of respect.</i>
Chauri	Chaur	<i>Symbol of the authority of the Guru Granth Sahib. Fan waved over scriptures, made of yak hairs or nylon. It should not be called a 'fly whisk'.</i>
Dasam Granth		<i>Collection of compositions, some of which are attributed to the tenth Sikh Guru, compiled some years after his death.</i>
Giani		<i>A person learned in the Sikh scriptures.</i>
Granthi		<i>Reader of the Guru Granth Sahib, who officiates at ceremonies.</i>
Gurbani	Bani, Vani	<i>Divine word revealed by the Gurus. The Shabads contained in the Guru Granth Sahib.</i>
Gurdwara	Gurudwara	<i>Sikh place of worship. Literally the 'doorway to the Guru'.</i>
Gurmat		<i>The Guru's guidance.</i>
Gurmukh		<i>One who lives by the Guru's teaching.</i>
Gurmukhi		<i>From the Guru's mouth. Name given to the script in which the scriptures and the Punjabi language are written.</i>
Gurpurb	Gurpurab	<i>A Guru's anniversary (birth or death). Also used for other anniversaries, e.g. of the installation of the Adi Granth, 1604 CE.</i>
Guru		<i>Teacher. In Sikhism, the title of Guru is reserved for the ten human Gurus and the Guru Granth Sahib.</i>
Guru Arjan		<i>The fifth Guru who was the first Sikh martyr (1563-1606).</i>
Guru Gobind Singh	Guru Govind Singh (Original name: Guru Gobind Rai)	<i>Tenth Sikh Guru. It is important to note that the title 'Guru' must be used with all the Gurus' names. Sikhs usually use further terms of respect, eg, Guru Gobind Singh Ji or Guru Nanak Dev Ji.</i>



PREFERRED FORM	MAIN VARIANT	EXPLANATION
Guru Granth Sahib	Adi Granth (Granth' by itself should be avoided)	<i>Primal collection of Sikh scriptures, compiled by Guru Arjan and given its final form by Guru Gobind Singh.</i>
Guru Har Gobind	Guru Hargobind; Guru Hargovind	<i>Sixth Sikh Guru.</i>
Guru Har Krishan	Guru Harkrishan	<i>Eighth Sikh Guru.</i>
Guru Nanak		<i>The first Guru and the founder of the Sikh faith (1469-1539).</i>
Guru Tegh Bahadur		<i>The ninth Guru who was martyred for the principle of religious tolerance (1622-1675).</i>
Haumai		<i>Egoism. The major spiritual defect.</i>
Hukam		<i>God' s will.</i>
Hukam	Vak	<i>Random reading taken for guidance from the Guru Granth Sahib.</i>
Ik Onkar		<i>There is only One God. The first phrase of the Mool Mantar. It is also used as a symbol to decorate Sikh objects.</i>
Janamsakhi	Janamsakhi	<i>Birth stories. Hagiographic life stories of a Guru, especially Guru Nanak.</i>
Japji Sahib		<i>A morning prayer, composed by Guru Nanak, which forms the first chapter of the Guru Granth Sahib.</i>
Jivan Mukht	Jivan Mukht	<i>Enlightened while in the material body; a spiritually enlightened person, freed from worldly bonds.</i>
Kachera		<i>Traditional underwear/shorts. One of the five K's (see panj kakke).</i>
Kakka	Singular of the Punjabi letter K (plural 'Kakke')	<i>See panj kakke.</i>
Kangha	Kanga	<i>Comb worn in the hair. One of the five K's (see panj kakke).</i>
Kara		<i>Steel band worn on the right wrist. One of the five K's (see panj kakke).</i>
Karah parshad	Karah Prasad	<i>Sanctified food distributed at Sikh ceremonies.</i>



PREFERRED FORM	MAIN VARIANT	EXPLANATION
Kaur		<i>Princess. Name given to all Sikh females by Guru Gobind Singh (see Singh).</i>
Kesh	Kes	<i>Uncut hair. One of the five K's (see panj kakke).</i>
Khalsa		<i>The community of the pure. The Sikh community.</i>
Khanda		<i>Double-edged sword used in the initiation ceremony. Also used as the emblem on the Sikh flag.</i>
Kirat karna		<i>Earning one's livelihood by one's own efforts.</i>
Kirpan Sword.		<i>One of the five K's (see panj kakke). 'Dagger' should be avoided.</i>
Kirtan		<i>Devotional singing of the compositions found in the Guru Granth Sahib.</i>
Kirtan Sohila		<i>A prayer said before retiring for sleep. It is also used at the cremation ceremony and when the Guru Granth Sahib is laid to rest.</i>
Kurahit		<i>Prohibitions, eg intoxicants.</i>
Langar	Guru ka Langar	<i>Guru's kitchen. The gurdwara dining hall and the food served in it.</i>
Mela		<i>Fair. Used of Sikh festivals which are not gurdwaras.</i>
Manji	Manji Sahib	<i>Small platform on which the scripture is placed.</i>
Manmukh	Munmukh	<i>Self-orientated (as opposed to gurmukh).</i>
Mool Mantar	Mul Mantar	<i>Basic teaching; essential teaching. The basic statement of belief at the beginning of the Guru Granth Sahib.</i>
Nam Simran	Nam Simaran; Naam Simran	<i>Meditation on the divine name, using passages of scripture.</i>
Nankana Sahib		<i>Birthplace of Guru Nanak. Now in Pakistan.</i>
Nishan Sahib		<i>Sikh flag flown at gurdwaras.</i>
Nit nem		<i>The recitation of specified daily prayers.</i>
Panj kakke		<i>The five K's. The symbols of Sikhism worn by Sikhs.</i>



PREFERRED FORM	MAIN VARIANT	EXPLANATION
Panj piare	Panj Pyare (other forms may also be found)	<i>The five beloved ones. Those first initiated into the Khalsa; those who perform the rite today.</i>
Panth		<i>The Sikh community.</i>
Patases	Patashas	<i>Sugar bubbles or crystals used to prepare Amrit.</i>
Punjab	Panjab	<i>Land of five rivers. The area of India in which Sikhism originated.</i>
Ragi		<i>Sikh musician who sings compositions from the Guru Granth Sahib.</i>
Rahit		<i>Sikh obligations, eg, to meditate on God.</i>
Rahit Maryada	Rehat Maryada	<i>Sikh Code of Discipline.</i>
Sadhsangat	Sangat	<i>Congregation or assembly of Sikhs.</i>
Sewa	Seva	<i>Service directed at the sadhsangat and gurdwara, but also to humanity in general.</i>
Shabad	Sabad Shabd	<i>Word. Hymn from the Guru Granth Sahib; the divine word.</i>
Sikh		<i>Learner; disciple. A person who believes in the ten Gurus and the Guru Granth Sahib, and who has no other religion.</i>
Singh		<i>Lion. Name adopted by Sikh males (see kaur).</i>
Sis Ganj Sahib		<i>The site of the martyrdom of Guru Tegh Bahadur (Delhi).</i>
Vak	Vask	<i>A random reading taken for guidance from the Guru Granth Sahib.</i>
Vand chhakna		<i>Sharing one's time, talents and earnings with the less fortunate.</i>
Waheguru		<i>Wonderful Lord. A Sikh name for God.</i>

Appendices

A The principles behind the Agreed Syllabus

B The legal position of the Agreed Syllabus

C Inclusion

D Learning outside the classroom

E Dealing with discussion, sensitive issues and pupils' questions and disclosures

F Contributors to the Agreed Syllabus

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Appendix A – Principles behind the Agreed Syllabus

At an early stage of their work, members of the Agreed Syllabus Conference (ASC) discussed the Aims of RE in Lewisham schools (to be found in the Introduction section to the syllabus) and the scope of the work they were engaged upon. The diagram that is set out on the next page illustrates the principles that they believe the syllabus is based upon.

Inside the triangle

The Agreed Syllabus Conference members want the Lewisham Agreed Syllabus for RE 2018 to support pupils as they acquire the knowledge, skills and understanding needed to play a full and active part in society. Teaching RE through the Syllabus should equip pupils with the necessary skills and knowledge to explore religious, spiritual and social issues sensitively, reflectively and critically, to consider evidence and personal experiences and to debate and make reasoned arguments. It should also prepare pupils to take their place in society as informed and reflective adults, able to live in respectful disagreement with those with different beliefs from their own.

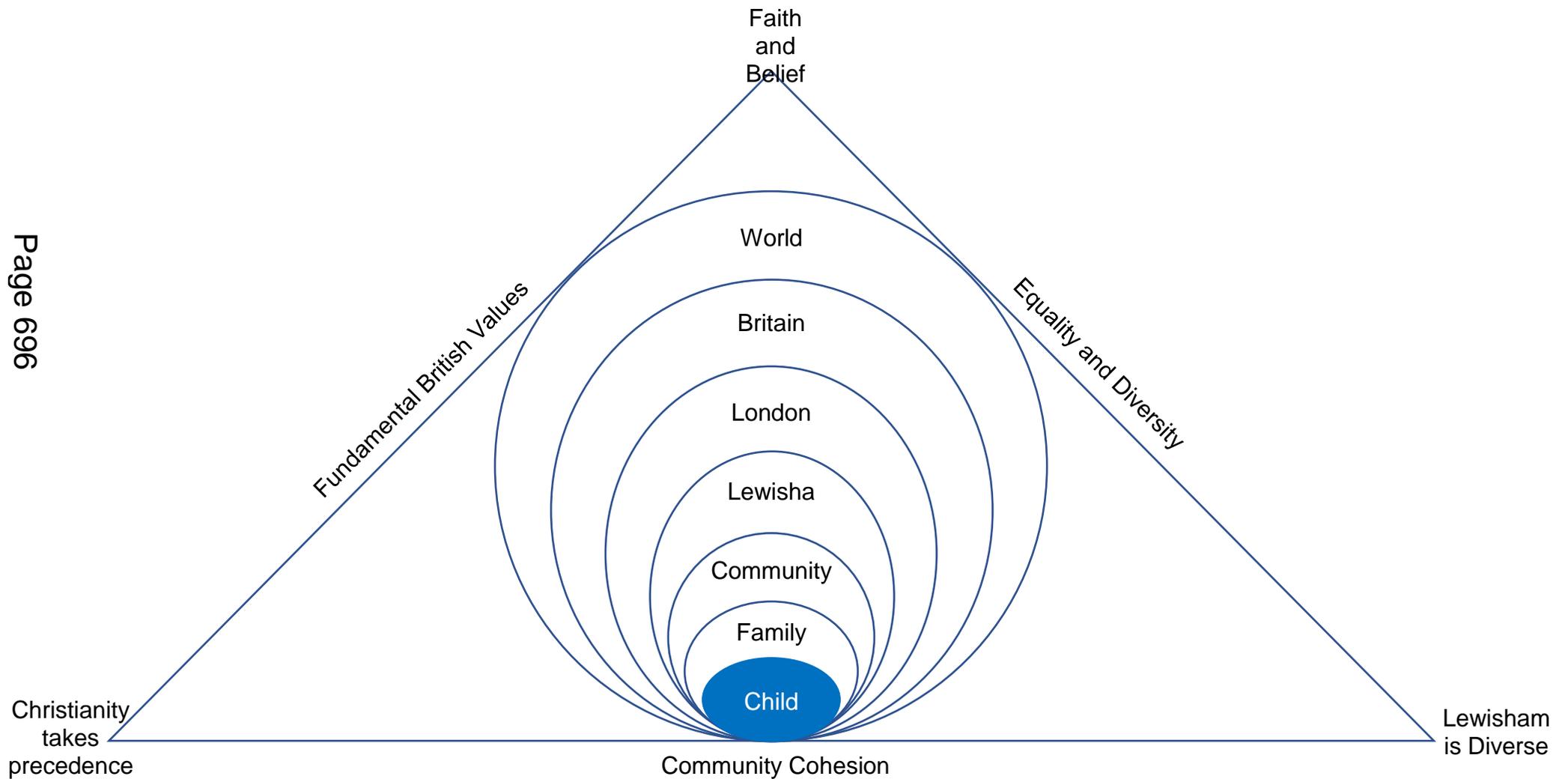
From the start of their educational journey RE should help pupils to learn about themselves as developing individuals and as members of their families and communities, building on their own experiences. As they grow this awareness and knowledge will develop to encompass the diversity of their Borough, their city, their country and the world. They will look at how faiths and beliefs hold some things in common and disagree about others, about how culture influences practices and about world families of faith and belief including those of the past.

Outside the triangle

Agreed Syllabus Conference members wanted the syllabus to include study of both faith and belief. The community of Lewisham includes people from a diverse range of faiths and beliefs including non-religious worldviews. Working within the legal framework underpinning their work members agreed the syllabus should ensure equal respect (not necessarily equal time allocation) should be paid to those faiths and beliefs featuring in the programmes of study whilst demonstrating that Christianity is the predominant religion in the UK. The diversity of the community of Lewisham and how it has developed and changed should also be a feature in the syllabus.

The syllabus has been written to support RE's Contribution to promoting Fundamental British Values - democracy, the rule of law, individual liberty and mutual respects for and tolerance of different faiths and beliefs - and should support and promote community cohesion.

Appendix A – Principles behind the Agreed Syllabus



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Appendix B – The legal position of the Agreed Syllabus

Religious Education is a component of the basic curriculum, to be taught alongside the National Curriculum in all maintained schools. In all maintained schools, other than voluntary aided schools with a religious character, it must be taught according to a locally Agreed Syllabus.

Each LA must convene an Agreed Syllabus Conference to produce a syllabus. Once adopted by the LA, the programme of study of the Agreed Syllabus sets out what pupils should be taught. The attainment levels set out the expected standards of pupils' performance at different ages.

The Education Act 1996 states that an Agreed Syllabus must reflect the fact that the religious traditions in Great Britain are in the main Christian, whilst taking account of the teachings and practices of the other principal religions represented in Great Britain.

Each LA must have a SACRE. The SACRE may require a review of the Agreed Syllabus at any time. This is in addition to the requirement on LAs to convene a conference to reconsider the Agreed Syllabus every five years.

Religious Education must be taught to all registered pupils in maintained schools, including those in the sixth form, except to those withdrawn by their parents. Parents have the statutory right to withdraw their child from RE. This requirement does not apply to nursery classes in maintained schools.

Academies must provide RE in accordance with the requirements for agreed syllabuses and have regard to the requirements of the non-statutory National Framework for RE (DFE, 2010) or, where the academy is designated as a school with a religious character, in accordance with the tenets of the specified religion or religious denomination (Academies Funding Agreement, DCSF, October 2006, pp.10-11)

In community, foundation or voluntary schools without a religious character, RE is taught in accordance with the local Agreed Syllabus.

For foundation and voluntary controlled schools with a religious character, RE must be taught according to the agreed syllabus unless parents request RE in accordance with the trust deed of the school. In voluntary aided schools RE must be taught in accordance with the trust deed.

RE must therefore be provided for:

- pupils in nursery schools or nursery classes in primary schools;
- any person aged nineteen or above for whom further education is being provided at school;
- any person over compulsory school age who is receiving part-time education; and
- A school prospectus and website must include details of:
 - the RE provided; and
 - the parents' right to withdraw their child from RE.

Pupils progress in RE should be reported to parents according to current yearly requirements. In all schools, the policy for teaching RE is the responsibility of the governing body and, as with all other curriculum subjects, the delivery is the responsibility of the teachers led by the head teacher.

This legal framework underpins the Agreed Syllabus and the process that has been undertaken to review it.

Appendix C – Inclusion

Providing effective learning opportunities for all pupils

Schools have a responsibility to provide a broad and balanced curriculum for all pupils. The National Curriculum and the local Agreed Syllabus for religious education are the starting points for planning a school curriculum that meets the specific needs of individuals and groups of pupils.

There are three principles that are essential to developing a more inclusive curriculum:

- Page 698
- Setting suitable learning challenges
 - Responding to pupils' diverse learning needs
 - Overcoming potential barriers to learning and assessment for individuals and groups of people.

Applying these principles should keep to a minimum the need for aspects of the National Curriculum or the Agreed Syllabus to be disapplied for a pupil. Schools are able to provide other curriculum opportunities outside the Curriculum to meet the needs of individuals or groups of pupils such as speech and language therapy and mobility training.

Three principles for inclusion.

In planning and teaching the Agreed Syllabus, teachers are required to have due regard to the following principles:

A. Setting suitable learning challenges

- 1 Teachers should aim to give every pupil the opportunity to experience success in learning and to achieve as high a standard as possible. The Agreed Syllabus sets out what most pupils should be taught at each key stage - but teachers should teach the knowledge, skills and understanding in ways that suit their pupils' abilities. This may mean choosing knowledge, skills and understanding from earlier or later key stages so that individual pupils can progress and show what they can achieve. Where it is appropriate for pupils to make extensive use of content from an earlier key stage, there may not be time to teach all aspects of the age-related programmes of study. A similarly flexible approach will be needed to take account of any gaps in pupils' learning resulting from missed or interrupted schooling [for example, that may be experienced by travellers, refugees, those in care with long term medical problems, such as head injuries, and those with degenerative conditions].
- 2 For pupils whose attainments fall significantly below the expected levels at a particular key stage, a much greater degree of differentiation will be necessary. In these circumstances, teachers may need to use the content of the Agreed Syllabus as a resource or to provide a context, in planning learning appropriate to the age and requirements of their pupils. For pupils whose attainments significantly exceed the expected level of attainment during a particular key stage, teachers will need to plan suitably challenging work. Teachers should plan to extend the breadth and depth of study with individually challenging tasks devised particularly to meet the needs of those pupils.

Appendix C – Inclusion

B Responding to pupil's diverse learning needs.

1 When planning, teachers should set high expectations and provide opportunities for all pupils to achieve, including boys and girls, pupils with special educational needs, pupils with disabilities, pupils from all social and cultural backgrounds, pupils of different ethnic groups, including travellers, refugees and asylum seekers, and those from diverse linguistic backgrounds. Teachers need to be aware that pupils bring to school different experiences, interests and strengths which will influence the way in which they learn. Teachers should plan their approaches to teaching and learning so that all pupils can take part in lessons fully and effectively.

To ensure that they meet the full range of pupils' needs, teachers should be aware of the requirements of the equal opportunities legislation that covers race, gender and disability.

- 3 Teachers should take specific action to respond to pupils' diverse needs by:
- creating effective learning environments;
 - securing their motivation and concentration;
 - providing equality of opportunity through teaching approaches;
 - using appropriate assessment approaches; and
 - setting targets for learning.

Examples for B/3a - creating effective learning environments in which:

- the contributions of all pupils are valued;
- all pupils feel secure and are able to contribute appropriately;
- stereotypical views are challenged and pupils learn to appreciate and view positively differences in others, whether arising from race, gender, religion, ability or disability;
- pupils learn to take responsibility for their actions and behaviours both in school and in the wider community;
- all forms of bullying and harassment, including racial harassment are challenged; and
- pupils are enabled to participate safely in clothing appropriate to their religious beliefs.

Appendix C – Inclusion

Examples for B/3b - securing motivation and concentration by:

- using teaching approaches to different learning styles;
- using, where appropriate, a range of organisational approaches such as setting, grouping or individual work, to ensure that learning needs are properly addressed;
- varying subject content and presentation so that this matches their learning needs;
- planning work which builds on their interests and cultural experiences;
- planning appropriately challenging work for those whose ability and understanding are in advance of their language skills;
- using materials which reflect social and cultural diversity and provide positive images, gender, religions and disability;
- planning and monitoring the pace of work so that they all have a chance to learn effectively and achieve success; and
- taking action to maintain interest and continuity of learning for pupils who may be absent for extended periods of time.

Examples for B/3c - providing equality of opportunity by:

- ensuring that boys and girls are able to participate in the same curriculum;
- taking account of the interests and concerns of boys and girls by using a range of activities and contexts for work and allowing a variety of interpretations and outcomes;
- avoiding gender stereotyping when organising pupils into groups, assigning them to activities or arranging access to equipment;

- taking account of pupils' specific religious or cultural beliefs relating to the presentation of ideas or experiences or to the use of particular types of equipment; and
- enabling the fullest possible participation of pupils with disabilities or particular medical needs in all subjects, offering positive role models and making provision, where necessary, to facilitate access to activities with appropriate support, aids or adaptations.

Examples for B/3d - using appropriate assessment approaches that:

- allow for different learning styles and ensure that pupils are given the chance and encouragement to demonstrate their competence and attainment through appropriate means;
- are familiar to the pupils and for which they have been adequately prepared;
- use materials which are free from discrimination and stereotyping in any form; and
- provide clear and unambiguous feedback to pupils to aid further learning.

Examples for B/3e - setting targets for learning that:

- build on pupils' knowledge, experiences, interests and strengths to improve areas of weakness and demonstrate progression over time; and
- are attainable and yet challenging and help pupils to develop their self-esteem and confidence in their ability to learn.

Appendix C – Inclusion

C Overcoming potential barriers to learning and assessment for individuals and groups of pupils

A minority of pupils will have particular learning and assessment requirements which go beyond the provisions described in sections A and B and, if not addressed, could create barriers to learning. These requirements are likely to arise as a consequence of a pupil having a special educational need or disability or may be linked to a pupil's progress in learning English as an additional language.

Teachers must take account of these requirements and make provision, where necessary, to support individuals or groups of pupils to enable them to participate effectively in the curriculum and assessment activities.

Pupils with special educational needs

Curriculum planning and assessment for pupils with special educational needs must take account of the type and extent of the difficulty experienced by the pupil. Teachers will encounter a wide range of pupils with special educational needs, some of whom will also have disabilities (see paragraphs C/4 and C/5). In many cases, the action necessary to respond to an individual's requirements for curriculum access will be met through greater differentiation of tasks and materials, consistent with school-based intervention. A small number of pupils may need access. Teachers should, where appropriate, work closely with representatives of other agencies who may be supporting the pupil.

- 2 Teachers should take specific action to provide access to learning for pupils with special educational needs by:
 - a. providing for pupils who need help with communication, language and literacy;
 - b. planning, where necessary, to develop pupils' understanding through the use of all available senses and experiences;
 - c. planning for pupils' full participation in learning and in physical and practical activities;
 - d. helping pupils to manage their behaviour, to take part in learning effectively and safely, and at key stage 4, to prepare for work; and
 - e. helping individuals to manage their emotions, particularly trauma or stress, and to take part in learning.

Examples for C/2a - providing for pupils who need help with communication, language and literacy through:

- using texts that pupils can read and understand;
- using visual and written materials in different formats, including large print, symbol, text and Braille;
- using ICT, other technological aids and taped materials;
- using alternative and augmentative communication, including signs and symbols; and
- using translators, communicators and amanuenses.

Appendix C – Inclusion

Examples for C/2b - developing pupils' understanding through the use of all available senses and experiences, by:

- using materials and resources that pupils can access through sight, touch, taste or smell;
- using word descriptions and other stimuli to make up for lack of first-hand experiences;
- using ICT, visual and other materials to increase pupils' knowledge of the wider world; and
- encouraging pupils to take part in everyday activities such as play, drama, class visits and exploring the environment.

Examples for C/2c - planning for pupils' full participation in learning and in practical activities through:

- using specialist aids and equipment;
- providing support from adults or peers when needed;
- adapting tasks or environments; and
- providing alternative activities, where necessary.

Examples for C/2d - helping pupils to manage their behaviour, take part in learning effectively and safely, and, at key stage 4, prepare for work by:

- setting realistic demands and stating them explicitly;
- using positive behaviour management, including a clear structure of rewards and sanctions;
- giving pupils every chance and encouragement to develop the skills they need to work well with a partner or a group; and
- teaching pupils to value and respect the contribution of others.

Examples for C/2e - helping individuals manage their emotions and take part in learning through:

- identifying aspects of learning in which the pupil will engage and plan short-term, easily achievable goals in selected activities;
- providing positive feedback to reinforce and encourage learning and build self-esteem;
- selecting tasks and materials sensitively to avoid unnecessary stress for the pupil;
- creating a supportive learning environment in which the pupil feels safe and is able to engage with learning; and
- allowing time for the pupil to engage with learning and gradually increasing the range of activities and demands.

Appendix C – Inclusion

Pupils with disabilities

3 Not all pupils with disabilities will necessarily have special educational needs. Many pupils with disabilities learn alongside their peers with little need for additional resources beyond the aids which they use as part of their daily life, such as a wheelchair, a hearing aid or equipment to aid vision. Teachers must take action, however, in their planning to ensure that these pupils are enabled to participate as fully and effectively as possible. Potential areas of difficulty should be identified and addressed at the outset of work.

4 Teachers should take specific action to enable the effective participation of pupils with disabilities by:

a. planning appropriate amounts of time to allow for the satisfactory completion of tasks;

b. planning opportunities, where necessary, for the development of skills in practical aspects of the curriculum;

c. identifying aspects of programmes of study and attainment targets that may present specific difficulties for individuals.

Examples for C/4a - planning appropriate amounts of time to allow pupils to complete tasks satisfactorily through:

- taking account of the very slow pace at which some pupils will be able to record work, either manually or with specialist equipment, and of the physical effort required;
- being aware of the high levels of concentration necessary for some pupils when following or interpreting text or graphics, particularly when using vision;

- allocating sufficient time, opportunity and access to equipment for pupils to gain information through experimental work and detailed observation, including the use of microscopes; and
- being aware of the effort required by some pupils to follow oral work, whether through use of residual hearing, lip reading or a signer, and of the tiredness or loss of concentration which may occur.

Examples for C/4b - creating opportunity for the development of skills in practical aspects of the curriculum through:

- providing adapted, modified or alternative activities and ensuring that these have integrity and enable pupils to make appropriate progress;
- providing alternative or adapted activities in practical activities for pupils who are unable to manipulate tools, equipment or materials or who may be allergic to certain types of materials;
- ensuring that all pupils can be included and participate safely in off-site visits, local studies, visits to museums, religious buildings and sites;

Examples for C/4c - overcoming specific difficulties for individuals presented by aspects of the programmes of study and attainment targets through:

- using approaches to enable hearing impaired pupils to learn about sound in worship;
- helping visually impaired pupils to learn about the use of symbolism and light in religions, visual resources and to evaluate images in work linked to art and design.

Appendix D – Learning outside the classroom

Every young person should experience the world beyond the classroom as an essential part of learning and personal development, whatever their age, ability or circumstances. To make this a reality, a national *Learning Outside the Classroom Manifesto* was launched that acted as a shared statement of intent for all who see the benefits to young people and want to help bring about this vision of high quality, meaningful learning experiences for all. The manifesto states that every young person should experience the world beyond the classroom as an essential part of learning and personal development, whatever their age, ability or circumstances.

These, often the most memorable learning experiences, help us to make sense of the world around us by making links between feelings and learning. They stay with us into adulthood and affect our behaviour, lifestyle and work. They influence our values and the decisions we make. They allow us to transfer learning experienced outside to the classroom and vice versa.

Learning outside the classroom is about raising achievement through an organised, powerful approach to learning in which direct experience is of prime importance. This is not only about what we learn but importantly how and where we learn.

Visits can be an excellent resource for religious education provided they are managed in a sensitive and thoughtful way. They can provide opportunities for pupils to learn by personal experiences that involve the sense of touch, smell, taste, hearing and sight:

- by meeting and talking to people from a faith community;
- by observing artwork created as a response to faith; and
- by acquiring the sensitivity to behave with appropriate respect.

Furthermore, visits provide an important link between schools and local faith communities.

Lewisham is fortunate in having a wealth and variety of places to visit available in the locality. It is also easy to organise excursions to places of worship further afield or galleries in London. Nevertheless, visits can raise issues for teachers, parents and faith leaders. Some of the pitfalls can be avoided by careful and thorough preparation and organisation.

The Agreed Syllabus includes many requirements where visits to local places of worship are recommended or are essential. However, teachers will appreciate that visits to places of worship are only one aspect of RE. They may be an interesting and helpful approach, but must be seen in the wider context of classroom activities rather than as a self-contained exercise. The purpose and value of suggested visits are clearly explained within each unit and ensure continuity and progression. There are opportunities to focus on different aspects, e.g. to look at internal and external features of a building, to explore symbols or to hear about the life and work of a community.

Appendix D – Learning outside the classroom

Practical Procedures and Preparation

When planning you must consider:

- The purpose of the proposed visit – what is the unit's precise aim and how does the visit contribute to this?
- Its place within the RE scheme of work/ Agreed Syllabus.
- Practical procedures, e.g. timing, travel, expense, etc. Teachers should check their school policy and consult their Educational Visits Co-ordinator. Letters to parents should explain the educational aims and the overall context and purpose of the visit. They should give details about times, expenses, dress, etc. and provide a reply slip for consent or refusal. They should also emphasise that the visit will not involve participation in any acts of worship. Wherever possible parents should be invited to accompany the pupils.
- The right of refusal – parents have the right to withdraw children from RE, and this includes visits to places of worship. However, there should always be an opportunity to discuss any issues, concerns and anxieties parents may have and to reassure them should their concerns be based on any misconceptions about the experience that has been planned. It is often useful to share planning with parents and to explain the context of this visit in the programme of visits that pupils will experience across the RE curriculum.
- How to prepare pupils to feel and show their respect to the place they are visiting and its community.

Risk Assessments

Risk Assessments should also be undertaken before every visit and should include consideration of potential exposure to promotion of political or religious extremism. Party leaders should conduct research and vetting ahead of the visit including checking of the published views of the place they are visiting. They could also obtain a letter of assurance from the site of the visit to ensure satisfaction that the place they are visiting will not undermine the school's duty to promote community cohesion.

Organising the experience

Phone or write to the nominated contact person at the place of worship. Remember that there may well not be someone available full time to speak to you and even if there is, they are often very busy, so allow them time to call back. Enquire about the possibility of a visit giving brief details, and where possible make arrangements for a preliminary visit. Remember that details about contacts at local places of worship change regularly so please check that you have the correct information about the person who will be able to host your visit.

Appendix D – Learning outside the classroom

A Preliminary visit

This is important as it enables you to discuss the possibilities and to decide whether the building is the most appropriate in relation to the aims. Have a look around the building with the host and take notes. Discuss whether seeing other rooms in the building, e.g. kitchens, rooms used for playgroups or religious classes etc., would be worthwhile. Pupils should understand that places of worship often serve their communities in a variety of ways, but this may not be your main focus for this visit. Discuss aims with the host and negotiate an understanding of the purpose of the visit and what is expected.

You must make it clear that the pupils' role is as observers rather than participators in an act of worship, and discuss any implications this may have regarding acceptable behaviour, e.g. bowing as a way of showing respect, eating food offered etc. There are issues here around interpretation - pupils and families from different faith backgrounds or none. Please give the prospective 'guide' a copy of the relevant unit of work so that they can see how the visit fits into the unit.

Appendix D – Learning outside the classroom

Information checklist

You need to tell the 'host':

- the specific focus of the visit and what you would like the pupils to be able to do;
- the age, ability range and approximate numbers of the pupils;
- range of their religious / non-religious backgrounds;
- whether there are likely to be members of their own community present;
- the pupils' level of prior knowledge about the religion concerned and the place of the visit in the overall topic or scheme of work; and
- what time you will arrive and when you will leave.

You will need to ask the host:

- if there are special requirements or sensitivities regarding dress and whether these apply to both genders;
- if there are any requirements regarding general behaviour, e.g. where or how they should sit and remember that attitudes towards sacredness of the building will vary in different traditions;
- if any activities are prohibited in the place of worship, e.g. taking photographs or sketching;
- who will be hosting the particular visit - it is important that the person has some experience of communicating with children;
- suitable times for visits - dates to avoid or those that might be particularly interesting;

- if there are any specific extra topics they can talk about that would be of particular interest in the context of this unit of work;
- about the facilities for the disabled; and
- about the availability of toilet facilities.

Always confirm details with the host and make sure that there is a contact telephone number in case of difficulties.

You will need to ensure that students:

- are aware of appropriate conduct and dress required in the place of worship visited; and
- understand the need to show respect to the building, traditions and contents of the place visited and its community.

Sensitivities

In all places of worship teachers need to be aware that their party may meet members of the community, some of whom may be experiencing times of great sadness or engaged in private worship. Pupils need to be prepared to behave sensitively.

Some places of worship welcome photographs whilst others find this intrusive. Ask beforehand.

N.B. Please avoid, wherever possible, taking all types of food into a place of worship.

Appendix E – Dealing with discussions, pupils’ questions and disclosures

Providing the opportunity for discussions about sensitive, controversial and challenging religious, philosophical, social and moral issues is vital to RE, as is the need to make sense of such issues in the context of pupils’ own life experiences. It is important that all class discussions take place in a climate of trust, cooperation and support.

Teachers need to create a safe environment in which pupils in all Key Stages can share their beliefs and feelings, explore their values and attitudes, express their opinions and consider those of others without attracting hostile comment directed to them personally or to their family or a community to which they belong. This will encourage open discussion, enhance pupils’ self-esteem and help them develop positive attitudes towards their learning and the beliefs and values of others.

Religious Education, and particularly the second attainment target, ‘Learning from religion’, might lead pupils to ask difficult questions or even make personal disclosures about their own beliefs or experiences. Understandably, teachers might find such situations difficult to handle; it would seem easy to say the wrong thing. Teachers might be tempted to focus on the first attainment target, ‘Learning about religion’, in order to avoid potentially difficult situations. However, this denies pupils access to those aspects of RE that are the most educationally rewarding.

Examples of difficult situations that might arise in the course of RE include pupils:

- asking questions to which different religions give different and/or opposing answers, e.g. ‘Was Jesus the Son of God?’;

- raising difficult philosophical or theological issues, e.g. ‘Why does a supposedly good God allow suffering?’, or a more specific or personal version of such a question;
- asking what the teacher believes, e.g. ‘Do you believe in God?’;
- raising spiritual or moral issues in a personal or political context, e.g. ‘we can’t always forgive people, can we?’;
- making comments or asking questions that reflect an offensive or unreflective approach to religion, e.g. ‘Are you one of the God squad?’;
- making inappropriate value judgements about the faith of other people, e.g. ‘People who believe that are stupid!’;
- making disclosures that reveal personal faith commitments, e.g. ‘I believe that the Qur’an is the absolute word of God’; and
- making personal disclosures, e.g. ‘My grandma died yesterday’.

Such situations might be difficult for one or more reasons:

- they might cause upset or offence to other pupils
- they might expose the pupil to upsetting comments
- they might reveal misunderstandings that seem in need of correction
- there might be no straightforward answer to pupils’ questions
- they might reveal an inability to cope with differences of opinion on the part of some pupils
- they might be embarrassing
- there might not be time to deal with them
- the teacher might not have the training or knowledge needed to deal with them.

Appendix E – Dealing with discussions, pupils’ questions and disclosures

There are no ‘off-the-shelf’ ways of dealing with such classroom incidents. Teachers will need to use their professional judgement and display sensitivity. The ethos of the school, and the contribution of RE to it, will be important in establishing the right climate for dealing with such questions and incidents. The following practical guidelines might help.

Suggestions

- Encourage the use of ‘owning and grounding’ language such as ‘in my opinion’ or ‘some Hindus would say’. This allows belief statements to be made in the classroom without everyone feeling they have to agree.
- Treat the difficult question or incident as a positive rather than negative event. Remember, it is the way the incident is dealt with and how the class response is managed that matters most.
- Affirm the importance of pupils’ contributions, even if you don’t agree with them, with phrases like ‘That is an excellent question – I’ve often wondered about that too’ or ‘You’re not the only one who doesn’t know the answer to that’.
- Help pupils to understand that diversity of opinion and the existence of unanswerable questions are aspects of life that we all have to accept, and that they do not disappear as they grow older or wiser.
- Encourage an awareness of diversity without undermining the pupil’s own beliefs. Allow for the possibility of a range of answers or opinions, e.g. use ‘most Christians would probably say...but some Muslims would think differently....’
- Encourage a ‘let’s explore this together’ approach in which the teacher is a participant, not an expert, e.g. use the situation to open up rather than close down conversation or thinking.

- Encourage further exploration by suggesting that pupils ask their questions of others, including faith community leaders, or look for help from the SACRE, the Diocese or other places. Advise pupils that their family, faith community and friends can play important roles in helping to provide answers and information.
- Correct factual misinformation factual errors or misinformation, wherever possible, without confrontation. At the same time, always respect the rights of pupils, their families and members of their communities to hold their own beliefs.
- Pupils might make personal disclosures out of a need for comfort. It might be possible in some cases to suggest a follow-up to the pupil’s disclosure (e.g. personal tutor) without ‘fobbing-off’ the importance of it. If this is not possible, assign the class an activity that provides time to attend to the pupil or gives the pupil some personal space.

Appendix E – Dealing with discussions, pupils’ questions and disclosures

Safeguarding with respect to religious practices (partially taken from NSPCC)

Understanding more about a child's faith and the role faith plays in family life is important for anyone working with children, families or communities. It can help when considering appropriate ways to approach conversations around child protection and child safety.

As well as education, safeguarding of children should still be the focus of all discussions as evidence of harmful practice may arise as part of these conversations. Staff must be aware that children need to be protected irrespective of cultural sensitivities. Under UK law, different practices are no excuse for child abuse or neglect and any concerns identified through classroom activities must be referred to the Designated Safeguarding Lead.

Safeguarding Children from bullying

Undermining or ridiculing another child’s beliefs is another potential issue that could arise and staff would have a responsibility to safeguard children from this behaviour, which can be done in a number of ways, including:

- Setting clear guidelines about respect and acceptance of differences that there may be between other faith and belief systems and the respective consequences of making poor choices in opportunities for discussion
- Acknowledgement that no view is superior to another
- Explaining that a difference of opinion is not wrong and using any differences of opinion to develop a healthy discussion

Staff should take particular care to monitor behaviour and make professional judgements about any behaviour which could be perceived as bullying if it is repeated, deliberate or continuous over time.

Agenda Item 11

COUNCIL		
Report Title	Secretary of State Approval Milford Towers	
Key Decision	Yes	Item No.
Ward	Rushey Green	
Contributors	Executive Director of Customer Services, Executive Director for Resources and Regeneration, Head of Law	
Class	Part 1	Date: 18 July 2018

1 Purpose of report

- 1.1 The purpose of this report is to recommend an extension of the leasing scheme that is currently in operation for the properties in Milford Towers in Catford that were previously Council homes and which are being decanted in advance of the regeneration of Catford Town Centre.

2 Overview

- 2.1 Mayor & Cabinet agreed in 2011 to decant the Milford Towers block above the shopping centre in Catford ahead of the long-term regeneration plans for the Catford town centre and subsequently agreed to enter into a leasing arrangement with Notting Hill Housing Trust (now Notting Hill Genesis) to re-let the 1 bed and studio properties on a short-term basis to local residents at an intermediate rent.
- 2.2 This initial leasing arrangement expired at the end of 2015 as demolition in advance of the long term regeneration of the town centre was expected to start in 2016. However due to on-going options reviews including the TFL review of the options for the location of the south circular road, this date was further moved back to December 2018. As a result of these delays, in July 2015 Mayor and Cabinet agreed that the leasing arrangements with Notting Hill be extended for a further three years until December 2018 subject to Secretary of State's consent being obtained under Section 32 of the Housing Act 1985. That consent was duly obtained and the leasing arrangements were extended.
- 2.3 Options for the south circular road have now been determined and agreed by Mayor and Cabinet in July 2017 and the master planning stage for Catford Town Centre will shortly commence.

- 2.4 Due to the time scales allotted to the master planning and development stage, it is envisaged that vacant possession of Milford Towers will not be required until December 2022.
- 2.5 As such, a decision needs to be made by Full Council regarding how Lewisham Council manages the ongoing decant whilst assuring it can ensure vacant possession prior to demolition.
- 2.6 The following recommendations will also be made to Mayor and Cabinet on the 11th July 2018; any comments from Mayor and Cabinet will be tabled at the Full Council meeting.
- 2.7 This report was also considered by Housing Select Committee on the 5th July 2018. At this meeting the committee noted the report and agreed with the recommendations which were being made to Mayor and Cabinet on the 11th July 2018.

3 Recommendations

It is recommended that Full Council:

- 3.1 notes the environmental and financial benefits of the leasing arrangement with Notting Hill Genesis and the rationale for extending the current arrangements;
- 3.2 subject to Secretary of State's consent being obtained under Section 32 of the Housing Act 1985, gives approval for the leasing arrangement to be extended for a further six years to December 2024, with reviews to be held annually, and the ability for both parties to end the arrangement at the annual review stage;
- 3.3 agrees to recommend to Full Council that the Council should apply to the Secretary of State for permission under Section 32 of the Housing Act 1985 to extend the leasing arrangement in the manner set out in this report;
- 3.4 subject to agreement of recommendations 3.2 and 3.3, note the proposed points 7.15 and 7.16 and agree that officers carry out the review as set out in paragraphs 7.16;
- 3.5 delegates authority to the Executive Director for Customer Services, in consultation with the Director of Regeneration and Resources and the Head of Law, to agree the final terms of the extension with Notting Hill and all associated legal documentation.

4 Summary

- 4.1 The process of decanting tenants from Milford Towers began in 2012 as part of the Council's long-term plans to regenerate Catford town centre. As an interim measure, a number of the properties that became

empty were leased to Notting Hill in March 2013 so that they could be let on a short term basis at sub-market rent.

- 4.2 This arrangement was entered into in order to prevent Milford Towers from becoming increasingly empty in advance of the longer term regeneration, whilst also reducing the risk of squatting and anti-social behaviour in the locality. It also provided a mechanism to minimise the amount of rent lost pending regeneration, while offering a housing solution for groups of local residents who may otherwise struggle to obtain self-contained accommodation locally, such as key workers and other people in work on relatively low incomes.
- 4.3 The latest monitoring data show that the scheme has been a success. The majority of the properties are let to residents who are in work but unable to afford full market rents (an estimated 70-75% are in work). 43% of the original tenants who moved in when the scheme started are still in occupation, and 94% of the 2017/18 new lettings were to residents previously living in the south-east sub region (Lewisham, Bromley, Greenwich, Southwark, Bexley). The location provides an excellent base for the number of the residents who work in service trades in London. Furthermore the scheme provides an income to the Council and retains an active income-earning resident base in Catford to help support the shopping centre.
- 4.4 The current short-term leases are due to expire in December 2018, as this was the revised timescale by which the demolition of Milford Towers was expected to commence. Although the options for the location of the South Circular have now been finalised, the master planning phases have just commenced and as such timescales for commencement of demolition have been pushed back further and it is envisaged that vacant possession of Milford Towers will not be required until some point in 2023. Given the success of the scheme to date, officers recommend that the leasing arrangement be extended in the manner set out in the body of this report.
- 4.5 Section 32 of the Housing Act 1985 requires the Council to apply to the Secretary of State for permission to extend the leases in the manner proposed, and the Council's Constitution requires any application to the Secretary of State for disposal consent under Section 32 to be approved by Full Council.

5 Policy context

- 5.1 The contents of this report are consistent with the Council's policy framework. It supports the achievements of the Sustainable Community Strategy policy objectives:
- Ambitious and achieving: where people are inspired and supported to fulfil their potential.

- Empowered and responsible: where people can be actively involved in their local area and contribute to tolerant, caring and supportive local communities.
 - Healthy, active and enjoyable: where people can actively participate in maintaining and improving their health and well-being, supported by high quality health and care services, leisure, culture and recreational activities.
- 5.2 The proposed recommendations are also in line with the Council policy priorities:
- Strengthening the local economy – gaining resources to regenerate key localities, strengthen employment skills and promote public transport.
 - Clean, green and liveable – improving environmental management the cleanliness and care for roads and pavements and promoting a sustainable environment.
- 5.3 Lewisham’s Housing Strategy for 2015 – 2020 identifies four priorities: helping residents at times of housing need; security and quality for private renters; improving our residents’ homes; building the homes our residents need. The Council’s assets can play a role in this, creating opportunities to develop new housing supply of all tenures, making land available for the construction of new homes and by using an understanding of the borough to improve the way service delivery connects with communities at a local level.

6 Background

- 6.1 The Council has been preparing long-term regeneration plans for Catford Town Centre for a number of years. In order to realise those plans it is necessary to achieve the full vacant possession of all of the Council’s assets in the area, including the Milford Towers block which sits above the Catford shopping centre.
- 6.2 Milford Towers comprises 276 residential units which were all previously Council homes let on social rents and managed by Lewisham Homes. The scheme has a preponderance of studio and one bed flats, limiting the range of household types and sizes which could be accommodated there, and creating a range of housing management pressures. In advance of the longer-term plans for regeneration, Mayor and Cabinet agreed in September 2011 that the decant of Milford Towers should commence, enabling officers to work with secure tenants to find alternative accommodation. At that time the Mayor also agreed to the implementation of a leasing scheme as the best mechanism for providing appropriate security measures, whilst maintaining a useful form of housing provision and also generating a small income stream for the Council.

6.3 In March 2013 a leasing scheme with Notting Hill Housing was approved, to enable Notting Hill Housing to provide short term housing for local people receiving low incomes, but who would not be eligible for social housing. At that time the following policy objectives were agreed for the project:

- To prevent Milford Towers becoming increasingly deserted during the development process and help maintain it as an occupied and thriving community
- To maintain security through the presence and occupation of tenants and thereby to reduce the risk of properties being squatted
- To help address the fear and risk of crime and anti-social behaviour that is associated with deserted estates
- To provide much needed low-cost rented accommodation to help meet housing need, and by promoting the scheme locally to target the opportunity to local people on low incomes.
- To maintain a revenue stream for the Council, helping to maintain the viability of the town centre and support the long term regeneration plans
- To maintain a number of homes to be available for use as temporary housing for homeless households, reducing the Council's reliance on more expensive forms of temporary accommodation
- To achieve all of these objectives in a manner that helps to ensure that full vacant possession of Milford Towers can be achieved in an orderly manner and at the time it is required to enable demolition.

6.4 The leasing scheme was originally framed to expire at the end of December 2015, and was then later extended to expire at the end of December 2018 as that was the time at which it was expected that vacant possession would be required in order to demolish the block. It is now no longer the case that demolition will take place early next year and as such this report presents a summary of the operation of the scheme to date and recommends that it be extended for up to a further four years, with an annual review process and the ability for both parties to end the arrangement at the annual review stage.

7 Operation of the scheme and rationale for extension

7.1 Over the past six years officers have been supporting the decant of the Council tenants and, since this leasing arrangement was finalised, an increasing number of the homes that have become vacant have been leased to Notting Hill Genesis. As at the end of May, the latest tenancy information for the 276 residential units was as follows:

Tenancy type	Number
Remaining social tenants	17
Remaining leaseholders	18
Decanted properties used for temporary housing for homeless households	49
Decanted properties leased to Notting Hill Genesis	191
Voids	1
Total	276

- 7.2 The properties that are used for temporary housing, as well as the remaining tenants and leaseholders, are managed on behalf of the Lewisham Council by Lewisham Homes, while the other units are managed by Notting Hill Genesis. In order to maintain the effectiveness of this mixed management approach Lewisham Council officers hold regular multi-agency meetings to monitor performance, ensure that the properties are let and managed in accordance with the contract, and to monitor anti-social behaviour in the locality. This group has effective working relationships with a range of local partners, such as the police, and has achieved significant success in resolving issues – such as crime, ASB and rough sleeping – as they arise.
- 7.3 As the table above shows, the scheme has achieved its first key policy objective, in ensuring that throughout the decant process Milford Towers remains fully let and occupied pending the regeneration. Furthermore the latest monitoring data that Notting Hill Genesis has for its tenants shows that the scheme is also achieving its objectives in relation to providing a housing option for local low income workers, and a recent survey of tenants has showed a high level of satisfaction.
- 7.4 In relation to providing a housing option for local low income workers, the monitoring data and analysis of housing benefit receipt shows that of the 191 flats that are leased through Notting Hill Genesis, between 70% and 75% of residents are in work. The majority of properties are let to residents who previously were resident in Lewisham or in Bromley, Bexley, Greenwich or Southwark which collectively make up the south east London “sub-region”. In 17/18 94% of new tenants moved to Milford Towers from south east London.
- 7.5 In advance of considering the merits of extending the lease arrangement, Notting Hill Genesis undertook a survey of its residents to ascertain their level of satisfaction with their homes and with Milford

Towers generally. A sample of 14% of the residents were surveyed and based on the results so far the main findings of this exercise were:

- Overall satisfaction levels are 70% overall, which is slightly higher than the overall satisfaction rate for all Notting Hill Genesis customers.
- 77% of the residents are satisfied with their homes. .
- 62% of the tenants are satisfied with the local area (31% happy or very happy).
- Their tenancy in Milford Towers has allowed many residents to maintain their jobs in London and maintain their links to local schools and hospitals. 85% would like to carry on living at Milford Towers and would welcome any extension of the lease

7.6 Lewisham Council have a positive working relationship with Notting Hill Genesis, and officers are pleased with the resources provided for the scheme. Two officers are allocated to Milford Towers full time, who maintain a regular on-site presence and have an in-depth knowledge of the area and residents. Notting Hill Genesis also provides to their tenancy sustainment and employment service, which includes in-depth benefits and welfare advice and assistance.

7.7 Rent levels have been maintained by Notting Hill Genesis throughout the leasing period at Local Housing Allowance rate or below, meaning that the properties continue to be accessible for low-income households and those in receipt of full Housing Benefit

7.8 There are currently 17 social tenants remaining on the estate and the decanting of these residents is ongoing. There are also 18 leaseholders, and the voluntary buy-back of these properties is currently underway.

7.7 The long term regeneration of the town centre was originally envisaged to commence in 2016 which was further extended, and as such the expected date for vacant possession – and therefore the current end date of the current lease arrangement – is December 2018. However, as a result of the on-going review of a range of long term options, and especially the options to re-site the South Circular – which would have significant effect on the development site available for regeneration – the expected date for the commencement of regeneration has been further pushed back.

7.8 The Council has been working in partnership with Transport for London to develop a scheme which marries the aspirations of the Council and TfL for reducing traffic dominance in the town centre, prioritising walking, cycling and public transport without causing significant problems elsewhere on the strategic transport network. After almost two years of collaboration in summer 2017 the Mayor agreed an outline

scheme which relocates the south circular to the edge of the town centre. £200k of council funding has also been committed into working up this design in partnership with TfL.

- 7.9 Work to develop a new master plan for the town centre could not commence until certainty on this critical infrastructure move had been achieved. Officers have now completed an assessment of bid submissions for the master planning role and an appointment report will be considered by Mayor & Cabinet Contracts at the end of June. Once the appointment is agreed a new master plan framework will be developed over the course of approximately 10 months (by April 2019).
- 7.10 Once the master plan has been completed, the timescales leading up to demolition of Milford Towers will become clearer. It is unlikely that demolition will be necessary until planning consent is achieved for the redevelopment of the site and agreement over decant is reached with the food store operator. The complicated stacked arrangement of uses with a Tesco food store underneath the Milford Towers housing means that agreement also needs to be reached with third party interests prior to demolition. It is unlikely that demolition could begin before the end of 2022 for these reasons.
- 7.11 Officers propose submitting an application to Secretary of State for an extension to the current lease arrangement, for a period of 6 years, which provides sufficient cover in the event that vacant occupation is not needed until further in to 2023, and also allows for a buffer as a mitigation against needing to seek approval for a shorter extension in the event of timescales being pushed back.
- 7.12 Given the need to continue to provide a secure and effective leasing scheme, as vacant possession will not be required this year as expected, officers have considered both re-tendering the lease arrangement and re-negotiating the existing arrangement, and believe that the latter offers the best balance of value for money and practical housing management benefits.
- 7.13 The alternatives – re-tendering – would require a significant amount of staffing input and financial costs to the Council, as 191 leases would need to be re-issued over a short period of time. This would be unsettling for the existing tenants, potentially require existing tenancies to be terminated and new tenancies entered into, and would also put at risk the existing successful arrangement by removing housing management team which has built up excellent knowledge and experience of the estate and its tenants, and replacing it with a new housing manager.
- 7.14 As such, officers have concluded in-principle negotiations with Notting Hill about a further extension to the existing arrangement pending the formal decision making that is required by Mayor and Cabinet and by Full Council.

- 7.15 Since the leasing arrangements commenced with Notting Hill Genesis, the operating environment and demand for affordable housing has changed. The Council has accepted a homeless duty to over 3,500 households during the past five years, and the Council faces an ever more challenging housing context with the number of households in Temporary Accommodation up 110% since 2010/11 and the number of social lets available down by 42% over the same period. With the implementation of the Homeless Reduction Act which came into force in March 2018 and the obligations it places on us as a Council to prevent homelessness, supply of properties for use for homelessness prevention and relief is less than the demand for such properties.
- 7.16 Due to these changes, officers have in-principle agreed with Notting Hill Genesis that, for all properties that become void in the coming period, both a low-cost PRS tenancy and a short term tenancy to a household that has presented as at risk of homelessness will be considered. This could equate to about 25 properties per year, and could provide a useful source of additional emergency local accommodation for residents at risk of homelessness.
- 7.17 Finally it should be noted that the original financial and investment model agreed with Notting Hill Genesis was designed to enable four years of use of the properties. This period has already been extended and by the end of the extension proposed here, the properties will have been in use for a further ten, not four years. As a result some cyclical and minor works are likely to be required throughout this period, and officers will agree the extent and cost implications of these on a case by case basis with Notting Hill Genesis.

8 Proposed terms of lease extension

- 8.1 There are two main factors for consideration in renewing the existing lease – firstly the timeframe it should be extended for, alongside any agreements to break the arrangement early, and secondly the financial arrangements including the balance of returns to each party.
- 8.2 On the former, both parties have agreed to the extension of the existing arrangement for a further four years up until the end of 2022, with an annual review process to enable either party to end the arrangement in an orderly and planned manner. Officers consider this to be an appropriate balance between ensuring that a successful project is retained and the potential need to seek vacant possession as regeneration plans are brought forward.
- 8.3 On the latter, the key considerations are the rent that is charged to tenants and the management and maintenance costs that Notting Hill Genesis will incur.
- 8.4 The income generated for the Council annually is estimated to be between £900k and £950k, for each of the four years that the scheme is proposed to be extended for.

9 Timetable and next steps

- 9.1 In making the decision to enter into a leasing arrangement with Notting Hill (now Notting Hill Genesis) in 2013, the Council relied on a general consent in the Housing Act 1985, which allowed it to grant a lease for up to seven years without seeking the consent of the Secretary of State for Local Government. However it has no such power to extend a lease arrangement as proposed here, and as such Secretary of State approval will be required to implement the recommended extension.
- 9.2 The Council's Constitution requires that Full Council approval is required in order for the Council to apply for Secretary of State approval, and as such the Mayor is recommended to request that Full Council should consider this issue and ratify the decision to apply for consent.
- 9.3 The current leases will expire in December 2018. The lead time on obtaining Secretary of State consent is currently estimated to be at least three months. It will therefore be necessary for this decision to be ratified by Full Council as quickly as possible. Consent must be obtained and the new leases put in place before the expiry of the existing leases, in order to avoid problems with the status of the existing Notting Hill tenants as their tenancies would otherwise automatically terminate on the expiry of Notting Hill's leases.

10 Comments of the Housing Select Committee

- 10.1 The Housing Select Committee (HSC) received and reviewed a draft of this report in advance of the Mayor and Cabinet meeting. Their comments have been provided as an addendum to this report.

11 Financial implications

- 11.1 Under the current arrangements with Notting Hill, the Council received approximately £954k in the last financial year.
- 11.2 It should be noted that the additional income will cease once the planned demolition of the block commences. This means that the additional income could be used to support short term pressures rather than form a part of the Council's longer term financial strategy.

12 Legal Implications

- 12.1 Under Section 32 of the Housing Act 1985 a local authority may not dispose of land held for housing purposes (Part II) without the consent of the Secretary of State. The grant of a lease of any length is a disposal for this purpose. If agreed, the extension of the existing leasing arrangements will need to be dealt with by granting new leases of all of the properties to Notting Hill. On 13 March 2013, the Secretary of State issued a series of General Disposal Consents under Section

32. General Consent A4.2.1 provides that a local authority may grant a lease of a term of less than 7 years and the Council was therefore able to rely on this General Consent to grant the original leases to Notting Hill and a specific disposal consent was not required. However, on the expiry of a tenancy covered by General Consent A4.2.1, the Council is not allowed to grant a further tenancy until one year after expiry of the original tenancy. There is no other General Consent that applies which means the Council is required to apply for a specific consent under Section 32 to enter into the new leases. Under the Council's Constitution, any application for disposal consent under Section 32 is required to be approved by Council. This was also required for the previous extension of the lease arrangements.

- 12.2 The Equality Act 2010 (the Act) brings together all previous equality legislation in England, Scotland and Wales. The Act includes a new public sector equality duty (the duty), replacing the separate duties relating to race, disability and gender equality. The duty came into force on 5 April 2011.
- 12.3 The duty consists of the 'general equality duty' which is the overarching requirement or substance of the duty, and the 'specific duties' which are intended to help performance of the general equality duty.
- 12.4 The duty covers the following nine protected characteristics: age, disability, gender reassignment, marriage and civil partnership, pregnancy and maternity, race, religion or belief, sex and sexual orientation.
- 12.5 In summary, the Council must, in the exercise of its functions, have due regard to the need to:
- eliminate unlawful discrimination, harassment and victimisation and other conduct prohibited by the Act.
 - advance equality of opportunity between people who share a protected characteristic and those who do not.
 - foster good relations between people who share a protected characteristic and those who do not.

These are often referred to as the three aims of the general equality duty.

- 12.6 As was the case for the original separate duties, the new duty continues to be a "have regard duty", and the weight to be attached to it is a matter for the Mayor, bearing in mind the issues of relevance and proportionality. It is not an absolute requirement to eliminate unlawful discrimination, advance equality of opportunity or foster good relations.
- 12.7 The Equality and Human Rights Commission (EHRC) have issued five guides for public authorities in England giving advice on the equality duty:

1. The essential guide to the public sector equality duty
2. Equality objectives and the equality duty
3. Equality information and the equality duty
4. Meeting the equality duty in policy and decision-making
5. Engagement and the equality duty

All the guides have now been revised and are up to date. The essential guide provides an overview of the equality duty requirements including the general equality duty, the specific duties and who they apply to. It covers what public authorities should do to meet the duty including steps that are legally required, as well as recommended actions. The other four documents provide more detailed guidance on key areas and advice on good practice. Further information and resources are available at:

<http://www.equalityhumanrights.com/advice-and-guidance/public-sector-equality-duty/guidance-on-the-equality-duty/>

- 12.8 The EHRC guidance does not have legal standing. Unlike the statutory Code of Practice on the public sector equality duty which was due to be produced by the EHRC under the Act. However, the Government has now stated that no further statutory codes under the Act will be approved. The EHRC has indicated that it will issue the draft code on the PSED as a non statutory code following further review and consultation but, like the guidance, the non statutory code will not have legal standing.

13 Crime and Disorder Implications

- 13.1 The leasing scheme is helping to manage crime and disorder by maintaining a presence of tenants on the estate, through effective housing management and through effective partnership working between housing providers, the police and other partners.

14 Equalities Implications

- 14.1 The proposals in this report will enable the low income worker tenants of the Milford Towers blocks to sustain their tenancies and avoid the need for short notice evictions as the leasing arrangement comes to an end.

15 Environmental implications

- 15.1 There are no environmental implications arising directly from this report.

16 Background documents and originator

16.1 The following sets out the background documentation that is relevant to this report:

Short Title of Document	Date	Location	Contact
Catford Town Centre – Phase 1 Next Steps – Part 1 Summary	13 July 2011	Available at this link	Jeff Endean 020 8314 6213

16.2 If you would like any further information on this report please contact Jeff Endean on 020 8314 6213.

COUNCIL			
Report Title	2017/18 FINAL ACCOUNTS AND EXTERNAL AUDITORS REPORTS		
Key Decision	No	Item No.	
Ward	ALL		
Contributors	EXECUTIVE DIRECTOR FOR RESOURCES AND REGENERATION		
Class		Date:	18 JULY 2018

1 PURPOSE

1.1 The purpose of this report is to present to Council the External Auditor's reports (Audit Findings and Value for Money) on the audit of the Council's 2017/18 Main accounts (including Group accounts) and Pension Fund accounts and to obtain members' approval of the Statement of Accounts for 2017/18 (including the Annual Governance Statement).

1.2 The Audit Findings Reports will follow at the meeting and will set out:

"... the key issues affecting the results of London Borough of Lewisham ('the Council') and the preparation of the Council's financial statements for the year ended 31 March 2018 ... (and) whether, in our opinion, the Council's financial statements give a true and fair view of the financial position of the Council and its income and expenditure for the year and whether they have been properly prepared ... (and) whether the Council has made proper arrangements to secure economy, efficiency and effectiveness in its use of resources ..."

1.3 The reports set out any issues arising from the audits that, in the opinion of the external auditor, are of sufficient significance to warrant informing and discussing with Members.

2. EXECUTIVE SUMMARY

2.1 As at the date of despatch of this report, the audits were substantially complete and the external auditor, Grant Thornton, anticipates that unqualified opinions on the financial statements will be issued. The external auditor's reports will have been discussed at Audit Panel on 12 July 2018.

2.2 This report sets out the recommendations necessary to ensure that the statutory requirements are met. The external auditor requests that Members:

- Note the adjustments to the financial statements in the reports
- Approve the letters of representation on behalf of the Council
- Agree the recommendations in the proposed action plans

2.3 Under the council's constitution these matters will be for Council to determine.

3. RECOMMENDATIONS

3.1 The Council are recommended to:

- i. Note the adjustments to the financial statements in the Audit Findings Reports
- ii. Agree the Action Plans set out in the Reports
- iii. Approve the Letters of Representation on behalf of the Council
- iv. Approve the Annual Governance Statement (AGS)
- v. Approve the 2017/18 audited Statement of Accounts (including Main accounts, Group accounts and Pension Fund accounts)

4. POLICY CONTEXT

4.1 Completing the audit of the council's accounts and receiving the auditor's report thereon contributes directly to the council's tenth corporate priority:

- **Inspiring efficiency, effectiveness and equity:** ensuring efficiency and equity in the delivery of excellent services to meet the needs of the community.

5. DETAIL

5.1.1 As at the date of despatch of this report, the audits were substantially complete and the external auditors, Grant Thornton, anticipate that subject to completing their outstanding work they will be giving an unqualified opinion on the financial statements; however, they are unable to issue a value for money conclusion at this time (pending further work on the transformation risks).

5.2 Under the terms of the Accounts & Audit Regulations 2015 ("The Regulations") the Council must, by no later than 31 July 2018:

- a. Consider either by way of a committee or by the members meeting as a whole the statement of accounts;
- b. Following that consideration, approve the statement of accounts by a resolution of that committee or meeting;
- c. Ensure that the statement of accounts is signed and dated by the person presiding at the committee or meeting at which that approval was given;
- d. Publish (which includes publication on the body's website), the statement of accounts together with any certificate, opinion, or report given or made by the auditor.

5.3 The Audit Panel have already considered the reports and officers' responses to them in detail and a short summary will be provided at the meeting. By considering that summary, Members will have discharged their duty under The Regulations.

- 5.4 The draft accounts have been amended for the agreed findings of the audit and the Letters of Representation by the Executive Director for Resources and Regeneration will be signed accordingly.
- 5.5 Members are therefore, by recommendation 3.1(v) to this report, recommended to approve the accounts.
- 5.6 Officers will ensure that the correct protocols for the signature and publication of the accounts are followed, to ensure compliance with the requirements of The Regulations.

6 ANNUAL GOVERNANCE STATEMENT

- 6.1 This document will have been considered at Audit Panel on 12 July 2018 and is now submitted for approval (with any changes as required).

7 FINANCIAL IMPLICATIONS

- 7.1 There are no direct financial implications in agreeing the recommendations in this report.
- 7.2 The total cost of external audit services in respect of 2017/18 is expected to be £234,000, including the cost of the audit of the accounts and the certification of grant claims and returns. The cost of the Pension Fund audit was £21,000.

8 LEGAL IMPLICATIONS

- 8.1 The key legal requirements are set out in paragraph 5.2 of this report. By agreeing the recommendations of this report Members will have put in place appropriate authority and arrangements to ensure that these are complied with.

9 EQUALITIES IMPLICATIONS

- 9.1 There are no equalities implications in this report.

10 CONSULTATION

- 10.1 The draft accounts have been published, and local electors have been able to exercise their rights to ask questions of the auditor in respect of them, and to inspect accounting records; also to make any objections if they wish.

11 ENVIRONMENTAL IMPLICATIONS

- 11.1 There are no environmental implications in this report.

12 CRIME AND DISORDER IMPLICATIONS

- 12.1 There are no crime and disorder implications arising from this report.

13 BACKGROUND PAPERS

None

APPENDICES

1. Draft audited 2017/18 Statement of Accounts (including Main Accounts, Group Accounts & Pension Fund Accounts)
2. 2017/18 Annual Governance Statement
3. Grant Thornton – The Audit Findings for the London Borough of Lewisham (including the Value for Money findings) (TO FOLLOW)
4. Grant Thornton – The Audit Findings for the Lewisham Pension Fund (TO FOLLOW)
5. Letter of Representation – Main Accounts (incl. Group Accounts) (TO FOLLOW)
6. Letter of Representation – Pension Fund Accounts (TO FOLLOW)

For further information on this report please contact:

Selwyn Thompson, Head of Financial Services, 020 8314 6932

LONDON BOROUGH OF LEWISHAM

2017/ 2018 PRE-AUDIT STATEMENT OF ACCOUNTS

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Narrative Statement

NARRATIVE STATEMENT BY THE EXECUTIVE DIRECTOR FOR RESOURCES AND REGENERATION

This Narrative Report provides information about Lewisham the place, together with the key issues affecting the Council and its accounts.

1. COUNCIL STRUCTURE AND PERFORMANCE

a) Corporate structure and governance

Lewisham Council is made up of one Mayor, elected by the whole borough, and 54 ward councillors, three elected by each of the 18 wards within the borough. The Mayor is Labour and there are 53 Labour councillors and 1 Green Party councillor. Details of the way that the Council governs itself are given in the Annual Governance Statement in section 9 of these accounts.

b) Management structure

Supporting the work of Councillors is the organisational structure of the Council headed by the Executive Management Team (EMT), led by the Chief Executive. EMT Members are:

- Chief Executive
- Executive Director Children and Young People
- Executive Director Community Services
- Executive Director Customer Services
- Executive Director Resources and Regeneration

EMT provides managerial leadership of the Council and supports elected members in:

- Developing strategies
- Identifying and planning the use of resources
- Delivering plans
- Reviewing the Authority's effectiveness

c) Service delivery

Including teachers, Lewisham employs approximately 5,800 full time equivalent staff to deliver services. The workforce generally reflects the diversity of Lewisham's population and a full staffing profile can be found on the Council's website.

The Council also provides services through two wholly-owned subsidiary companies:

- Lewisham Homes Ltd: An arms-length management organisation (ALMO) set up in 2007 as part of the Council's initiative to deliver better housing services and achieve the Decent Homes Standard. The company manages approximately 18,000 homes.
- Catford Regeneration Partnership Ltd: The company owns the Catford shopping centre and aims to drive forward a regeneration programme for the town centre and the surrounding area.

More detail concerning these companies is shown in the Group Accounts in section 8 of this document.

Narrative Statement

d) The Council's vision

Lewisham's vision is: 'Together, we will make Lewisham the best place in London to live, work and learn'. Our vision was developed following consultation with Lewisham residents, public sector agencies, local business, voluntary and community sector organisations. This vision is not just for the Council, it has been adopted by the Lewisham Strategic Partnership and continues to be a bold aspiration that stretches and motivates the Council and its partners to set priorities and deliver services that will achieve the vision. The key strategic document for Lewisham and for the Lewisham Strategic Partnership is "Shaping Our Future - Lewisham's Sustainable Community Strategy 2008-2020", which can be viewed on the Council's website.

e) Corporate priorities in achieving the vision

The Council's ten corporate priorities determine what contribution the Council will make towards the delivery of Shaping our Future. The priorities focus on the needs of local people and are geared towards ensuring that, in delivering services, the Council focuses on its citizens, is transparent and responds to changing needs and demands. The priorities are as follows:

- Community Leadership and Empowerment – Creating opportunities for people within the community to participate and become engaged.
- Young people's achievement and involvement – Increasing educational achievement, and through partnership working to improve facilities for young people within the borough.
- Clean green and liveable – Through improvement to environmental management, the maintained care for roads and pavements. Encouraging a sustainable way of life/sustainable environment.
- Safety security and visible presence – Through working with the police to reduce crime levels, prevention of anti-social behaviour through Council powers/resources.
- Strengthening the local economy – Through the gain of resources to redevelop key localities, strengthen employment skills and encouraging the use of public transport.
- Decent homes for all – The creation of housing that is social and affordable to achieve 'the decent homes standard', reducing homelessness.
- Protection of children – Improved safeguarding and for children at risk the presence of joined services.
- Caring for adults and older people – To provide support to the elderly and adults that require help by working with health services.
- Active healthy citizens – Providing leisure, sporting and learning activities for everyone.
- Inspiring efficiency, effectiveness and equity – Ensuring that the services provided to meet the communities needs is efficient.

f) Performance measurement

A management report is produced each month to place on record our performance against priorities. Each month we attempt to give a full account of what is being done, what has been achieved and which areas require additional management attention to secure future achievements. The report focuses on the Council's performance in line with our corporate priorities, drawing data from:

- performance indicators (PIs)
- project monitoring information
- risk register assessments
- Financial reports.

A dashboard summary gives an overall picture on one page using a red, amber, green rating. The full Management Report can be viewed on the Council's website.

Narrative Statement

2. FINANCIAL PERFORMANCE**a) 2017/18 Revenue Budget Setting and Funding**

The Council set a net budget requirement of £232.7m for 2017/18 at its meeting on 8th February 2017. This was a decrease of £3.5m or 1.5% on the previous year's net budget requirement of £236.2m. The main sources of income were Revenue Support Grant (RSG), Business Rates and Council Tax. With central RSG diminishing, Council Tax funds a higher proportion of the budget than it did last year, with bills increasing by 4.99%. A year on year comparison of revenue budget funding is shown in the following table.

2017/18 Revenue Budget Funding

	2017/18 £m	2016/17 £m
Revenue Support Grant	46.1	59.6
Business Rates	88.9	87.1
Council Tax	91.1	84.9
Social Care Precept	2.7	1.7
Surplus on Collection Fund	3.9	2.9
Budget Requirement	232.7	236.2

b) Council Tax

In 2017/18, in addition to an increase in Council Tax for general purposes, Councils were given the ability to raise Council Tax by up to a further 2% as a precept to fund Adult Social Care expenditure without the need for a referendum. This was in response to the concerns about the growing funding gap for Adult Social Care caused by an increase in demand and the introduction of the National Living Wage, which impacted directly on the cost of care provision.

The Council increased the general rate of Council Tax by 2.99% and agreed to levy the 2% Adult Social Care precept resulting in an overall 4.99% increase in 2017/18. The actual Council Tax charge is determined by dividing the net amount to be met from Council Tax by the tax base, which for Lewisham is 81,088 equivalent Band D properties for 2017/18 (78,528 for 2016/17).

The comparison of Council Tax Band D levels from 2016/17 to 2017/18 for Lewisham is shown in the following table, together with the Greater London Authority precept.

Band D Council Tax by Tax Raising Body

	2017/18 £	2016/17 £	Variation £	Variation %
Lewisham Council	1,157.68	1,102.66	55.0	5.0
Greater London Authority	280.02	276.00	4.0	1.5
Council Tax for Band D	1,437.70	1,378.66	59.0	4.3

Narrative Statement

c) 2017/18 Revenue Budget Outturn

The Council's 2017/18 revenue outturn position is shown in the following table. Further detail can be found in the Expenditure and Funding Analysis in section 3 of this document.

Directorate	Gross budgeted expenditure	Gross budgeted income	Net budget	Variance	Variance
	£m	£m	£m	£m	%
Children & Young People	66.7	(18.0)	48.7	15.6	32.0%
Community Services	167.0	(80.0)	87.0	(0.9)	-1.0%
Customer Services	102.7	(60.1)	42.6	5.0	11.7%
Resources & Regeneration	76.9	(51.8)	25.1	(1.9)	-7.6%
Directorate totals	413.3	(209.9)	203.4	17.8	8.8%
Corporate items	29.3	0.0	29.3	(1.3)	-4.4%
Net Revenue Budget	442.6	(209.9)	232.7	16.5	7.1%

During 2017/18, the overall overspend against the directorates' net controllable budgets was £17.8m. After applying the sum of £1.3m which was the residual sum set aside in setting the 2017/18 budget for 'risks and other budget pressures', this brought the final directorate overspend down to £16.5m. The reasons for these variances are being reported to the Mayor and Cabinet on the 27th June 2018. The level of overspend recorded at the close of the 2017/18 financial year is unprecedented for Lewisham. It would firmly suggest that these are budgetary pressures of an order not previously seen by the council and in particular with regards to children's social care.

Throughout the year, Mayor & Cabinet and Executive Directors have received regular financial monitoring reports and continued to implement measures to alleviate the Council's overall budget pressures and to control spending insofar as is possible. These measures have included the maintaining of local controls on particular expenditure in the short term.

With a new set of challenges in terms of the delivery of revenue budget savings, the council will continue to apply sound financial controls in 2018/19. It is clear that the short and medium-term outlook will remain difficult and exceptionally challenging. However, as the local authority's section 151 officer, the Executive Director for Resources and Regeneration will continue to work with directorate management teams across the council to effect the necessary continued actions to manage their services.

Budget overspends

There were significant overspends in 2017/18 in the placement budgets for the following areas:

For residential care the placements budget was overspent by £3.2m. These placements have grown throughout the year and totalled 42 as at the end of March 2018. At the end of 2017/18, the cost was on average £3,970 per week.

For services related to fostering both in-house and external, this overspend by £2m with the number of clients at the year-end being 357. The total number of external foster placements has moved from 171 in 2016/17 to 191 for 2017/18.

The schools transport budget within the partnerships and targeted services area overspent by £2.2m. The cost of travel assistance has been the main cause of the budget pressure due to the increased use of taxis for extra pupils being transported. This has resulted in overall additional costs of £1m on schools' transport for 2017/18.

Adult services is overspent by £0.8m. The main variances relate to (i) costs associated with deprivation of liberty safeguards (DOLS), (ii) placement budgets where existing pressures are compounded by the cost of new transition cases of £0.9m, by pressures from earlier discharges from hospital and (iii) by the difficulty in achieving the £4.5m savings required for 2017/18.

Narrative Statement

The environment service has overspent by £3.2m. This includes the refuse service overspend by £2.1m. Additional costs have been incurred by the service as a result of the delay in implementing the move to fortnightly collections and the introduction of a new service for food and garden waste collection, pertaining to staffing and equipment. Furthermore, part of this overspend relates to vehicle costs for the service, where an overspend of £0.7m relates to additional vehicle hire costs, as a result of a number of vehicles coming to the end of their useful life, with vehicle hire costs being at least three times the cost of council owned vehicles.

Dedicated Schools Grant

There were nine schools with licenced deficit budgets at the year end. Of these schools, three of them were granted loans in excess of £0.5m. At the end of the financial year there are a further six schools who have a deficit balances and will need to apply for a licensed deficit (See also Note 38 – Contingent Liabilities).

Total school balances increased by £5.8m in 2017/18. The final balance held by schools including external funds now stands at £18.6m. This should not detract from the fact that overall, secondary schools have a cumulative deficit of £0.3m, with four of the 11 secondary schools in deficit.

d) Balances and Reserves

After transfers to and from reserves the General Fund balance has been kept at £13.0m due to the proposed reduction in future Government funding and the corresponding requirement on the Council to make savings. This is an adequate level of cover and represents approximately 5.6% of Lewisham's Net Budget Requirement. The Council also has a number of earmarked reserves for specific on-going initiatives and these are shown in Note 9 to the Core Financial Statements.

The Housing Revenue Account (HRA) spent to budget after transfers to reserves as at 31st March 2018. It continues to build reserves up on an annual basis, mainly to ensure that there are sufficient resources available to fund the current 30 year business plan. This aims to continue to invest in decent homes and to significantly increase the supply of housing in the borough over the medium to long term. The business plan is reviewed each year to ensure that the resources available from HRA reserves can be profiled appropriately to meet the business needs. After transfers to and from reserves the HRA balance at the end of the year, including earmarked reserves, now stands at £108.7m (£97.0m as at 31st March 2017). These reserves include the Major Repairs Reserve and are for specific on-going projects as outlined in the notes to the HRA in Section 4 of the Accounts.

Narrative Statement

e) 2017/18 Capital Budget Outturn

The capital programme expenditure incurred during the year and how it was resourced is shown below. The percentage spent compared to the revised programme budget was 86%. Where programme slippage has occurred, the scheme budgets have been carried forward to 2018/19.

2017/18 Capital Programme

	2017/18 Final Outturn £m	2017/18 Budget Report £m	2016/17 Final Outturn £m
CAPITAL PROGRAMME EXPENDITURE			
General Fund	54.9	64.5	42.2
Housing Revenue Account	32.1	36.2	28.7
Total Spent	87.0	100.7	70.9
CAPITAL PROGRAMME FINANCING			
Borrowing	14.9	12.8	7.0
Capital Grants	18.5	25.0	18.2
Capital Receipts	18.8	10.7	19.2
Use of reserves and revenue financing	34.8	52.2	26.5
Total Financed	87.0	100.7	70.9

Major Projects of over £1m**General Fund**

Lewisham Homes – Property Acquisition
 School Places Programme
 Highways & Bridges (incl. TFL programme)
 Heathside & Lethbridge Estates
 Schools minor works

Housing Revenue Account

Decent Homes Programme

2017/18 Expenditure £m
12.0
10.5
10.0
6.7
1.1
24.3

3. LOOKING AHEAD**a) Revenue Budget Outlook**

When preparing the Council's Medium Term Financial Strategy (MTFS) the Council makes provisional spending plans for future financial years ensuring these are balanced against the expected funding from Government, Council Tax payers and Business Rate payers. The MTFS is a four year incremental process that builds on the work and achievements of previous years, taking into account demographic, legislative and other pressures; mitigated by a series of savings proposals to ensure a balanced budget can be achieved in the coming year, and that there is financial sustainability for future years.

Narrative Statement

The Council set a net budget requirement of £242.3m for 2018/19 at its meeting on 21 February 2018, which is £8.6m higher than the equivalent figure for 2017/18. The Council has made savings reductions of £4.8m to its budget and added £16.9m to provide for significant spending pressures which are being experienced and £5.0m to make up for one-off reserves used in 2017/18. An amount of £8.5m is being taken from reserves to fund the budget, but action is also being taken to ensure that expenditure is affordable in future years. The Council is maintaining adequate reserves to enable it to manage the significant funding risks it faces as the national programme of public sector expenditure reduction continues.

The report to Council projected that estimated savings of circa £35.0m are likely to be required by 2020/21. The Lewisham Future Programme (LFP) was established to carry out cross-cutting and thematic reviews to deliver ongoing savings and their work to date was presented in a report to the Mayor in December 2017. Some examples of the LFP's reviews include: smarter assessment arrangements and deeper integration of social & health care, including public health; approach to safeguarding and early intervention services; opportunities for asset rationalisation; a strategic review of income generation and the drive to make further reductions in management and corporate overheads. This work continues and further savings proposals may be brought forward in 2018/19 to help close the long term budget gap identified above.

The Council has prepared forecasts beyond 2019/20 to 2022/23, However, these are tentative at this stage as they are be subject to, amongst other things, the results of the next Comprehensive Spending Review, results of the delayed Fair Funding Review, any move to 100% business rates retention by local government in 2020, and possible changes to health and social care governance and funding arrangements. From the government's financial forecasts and outlook, further reductions to local government funding are to be expected into at least the mid-2020s.

b) Capital Budget Outlook

The Council set its capital programme budget at its meeting on 21 February 2018. This outlined the Council's programme of £271.5m for the years 2018/19 to 2020/21. The most significant parts of the programme are school expansion to provide additional pupil places, major regeneration schemes, including Catford town centre, improvement and restoration of Beckenham Place Park, plus acquiring additional housing stock under the Housing Matters programme, to be delivered by the Council's ALMO, Lewisham Homes.

The amount to be invested in 2018/19 is shown in the table below.

	2018/19 Budget £m
2018/19 Capital Programme	
General Fund	
Schools – Pupil Places Programme	17.7
Lewisham Homes – Property acquisition	10.0
Beckenham Place Park	5.5
Edward St. development	4.9
Catford town centre	4.8
Highways and bridges	3.1
Corporate estate	3.9
Fleet replacement	2.6
Other schemes	10.7
	63.2
Housing Revenue Account	
Decent Homes Programme	43.9
Housing Matters Programme	28.8
	72.7
Total Capital Programme	135.9

Narrative Statement

c) Corporate Risks

The Council has an embedded process to manage risks and assist the achievement of its objectives. The Risk Management Strategy was approved by EMT in July 2017 and noted by Audit Panel in December 2017. It is summarised as part of the Annual Governance Statement in section 9 of this document.

Risks are scored in terms of likelihood and impact, with a range from 1 to 5 (with 5 being the highest) and the result is plotted on a matrix to produce a Red/Amber/Green rating. The risks currently rated red for the Council are as follows:

- Loss of a strategic asset or premises through failure to maintain it in a safe and effective condition
- noncompliance with Health & Safety legislation
- Strategic programme to develop and implement transformational change does not deliver
- financial failure and inability to maintain service delivery within a balanced budget
- loss of income to the Council
- serious adult safeguarding concerns
- failure of child safeguarding arrangements

The risk register contains action plans to manage the risks to target and these are subject to regular review by Directorate Management Teams. The risk registers are reported to Heads of Service and Internal Control Board on a quarterly basis.

4. PENSION FUND VALUATION

The actuarial valuation of the Council's pension scheme liabilities and pension reserve shown on the Balance Sheet have decreased by £4.5m during the year, mainly as a result of changes to the financial assumptions used by the pension fund Actuary (Hymans-Robertson). The Council relies and places assurance on the professional judgement of the Actuary and the assumptions used to calculate this actuarial valuation.

It is important to understand that pension benefits do not become payable until employees retire, however the council is required to account for the future obligations at the same time as the employees earn their future entitlement, in accordance with proper accounting practices. Further details are given in Note 37.

5. THE COUNCIL'S STATEMENT OF ACCOUNTS

The statement of accounts reports the income and expenditure on service provision for the year and the value of the council's assets and liabilities at the end of the financial year. This is prepared in accordance with proper accounting practices as defined in the Chartered Institute of Public Finance and Accountancy (CIPFA) Code of Practice on Local Authority Accounting in the United Kingdom (the Code).

Local authorities are required to produce a comprehensive income and expenditure statement, a balance sheet and a cash flow statement, as a private sector company would. For 2016/17 an expenditure and funding analysis was introduced. However, as local authorities are also tax raising bodies (through council tax), they are required to produce an additional financial statement, accounting for movements to and from the general fund, through a movement in reserves statement. A review of materiality has also concluded that Group Accounts are required this year. A brief explanation of the purpose of each of financial statements is provided below:

Narrative Statement

Section 1 – The Core Financial Statements

Section 1a – Comprehensive Income and Expenditure Statement (CIES)

This statement shows the cost of providing services in the year in accordance with International Financial Reporting Standards, rather than the amount funded from Council Tax, and other Government grants. The amount funded from Council Tax and Government grants differ from this by a series of adjustments made in accordance with regulations. The taxation position is shown in both the Expenditure and Funding Analysis and the Movement in Reserves Statement.

Section 1b - Movement in Reserves Statement (MiRS)

This statement shows the movement from the start of the year to the end on the different reserves held by the authority, analysed into 'usable reserves' (i.e. those that can be applied to fund expenditure or reduce local taxation) and other 'unusable reserves'. The Movement in Reserves Statement shows how the movements in year of the authority's reserves are broken down between gains and losses incurred in accordance with generally accepted accounting practices and the statutory adjustments required to return to the amounts chargeable to council tax [or rents] for the year. The Net Increase/Decrease line shows the statutory General Fund Balance and Housing Revenue Account Balance movements in the year following those adjustments.

Section 1c - Balance Sheet

The Balance Sheet shows the value as at the Balance Sheet date of the assets and liabilities recognised by the authority. The net assets of the authority (assets less liabilities) are matched by the reserves held by the authority. Reserves are reported in two categories. The first category of reserves are usable reserves, i.e. those reserves that the authority may use to provide services, subject to the need to maintain a prudent level of reserves and any statutory limitations on their use (for example the Capital Receipts Reserve that may only be used to fund capital expenditure or repay debt). The second category of reserves are those that the authority is not able to use to provide services. This category of reserves includes reserves that hold unrealised gains and losses (for example the Revaluation Reserve), where amounts would only become available to provide services if the assets are sold; and reserves that hold timing differences shown in the Movement in Reserves Statement line 'Adjustments between accounting basis and funding basis under regulations'.

Section 1d - Cash Flow Statement

The Cash Flow Statement shows the changes in cash and cash equivalents of the authority during the reporting period. The statement shows how the authority generates and uses cash and cash equivalents by classifying cash flows as operating, investing and financing activities. The amount of net cash flows arising from operating activities is a key indicator of the extent to which the operations of the authority are funded by way of taxation and grant income or from the recipients of services provided by the authority. Investing activities represent the extent to which cash outflows have been made for resources which are intended to contribute to the authority's future service delivery. Cash flows arising from financing activities are useful in predicting claims on future cash flows by providers of capital (i.e. borrowing) to the authority.

Narrative Statement

Section 2 – Statement of Accounting Policies

These outline the accounting and measurement bases used for the recognition, measurement and disclosure of figures and events in preparing the financial statements in the accounts. Other accounting policies used that are relevant to an understanding of the financial statements are also included.

Section 3 – Notes to the Core Financial Statements

This section contains notes that help to explain or give more detail to the Core Financial Statements.

Section 4 – Housing Revenue Account (HRA)

This is a statutory account which shows the major elements of income and expenditure on Council Housing provision and associated services to Council tenants and leaseholders.

Section 5 – Collection Fund Accounts

This is a statutory account which shows the transactions relating to Council Tax and Non-Domestic Rates. It shows how the amounts collected have been distributed to the Council's General Fund, the Greater London Authority and Central Government.

Section 6 – Group Accounts

The Group Accounts combine the financial results of Lewisham Council with that of its subsidiaries, Lewisham Homes Ltd and Catford Regeneration Partnership Ltd. Transactions between the two subsidiaries and the Council are removed on merging the accounts of all parties. The Group Accounts therefore add the surpluses and balances and show the combined financial position for all three entities.

Section 7 - Glossary

This explains some technical and commonly used terms.

Section 8 – Pension Fund Accounts

The Lewisham Pension Fund is a separate entity from the Council and thus has its own accounts. These show the income and expenditure for the year, the value of the investments held and an assessment of the liabilities at the year end.

Section 9 – Annual Governance Statement (AGS)

This sets out the control and governance framework for all significant corporate systems and processes, cultures and values by which the Council is directed and controlled. It describes the activities with which the community is engaged and enables the monitoring of the achievement of the strategic objectives and the delivery of appropriate and cost effective services. It also reports any significant issues and the actions already taken and planned to be taken to address these.

Statement of Responsibilities & Independent Auditor's Reports

THE STATEMENT OF RESPONSIBILITIES FOR THE STATEMENT OF ACCOUNTS

The Authority's Responsibilities

The Authority is required:

- to make arrangements for the proper administration of its financial affairs and to ensure that one of its officers has the responsibility for the administration of those affairs. In this Authority, that officer is the Executive Director for Resources and Regeneration;
- to manage its affairs to secure economic, efficient and effective use of resources and safeguard its assets;
- to approve the Statement of Accounts.

Responsibility of the Executive Director for Resources and Regeneration

The Executive Director for Resources and Regeneration is responsible for the preparation of the Authority's Statement of Accounts in accordance with proper practices as set out in the CIPFA/LASAAC Code of Practice on Local Authority Accounting in the United Kingdom (the 'Code of Practice').

In preparing the Statement of Accounts as set out in this document, I certify that I have:

- selected suitable accounting policies and applied them consistently;
- made judgements and estimates that were reasonable and prudent;
- complied with the CIPFA Local Authority Code of Practice.

I certify that I have also:

- kept proper accounting records which were up to date;
- taken reasonable steps for the prevention and detection of fraud and other irregularities.

The Statement of Accounts gives a true and fair view of the financial position of the Authority at the accounting date and its income and expenditure for the year ended 31 March 2018.

The Statement of Accounts is unaudited and may be subject to change.



Janet Senior CPFA
Executive Director for Resources and Regeneration
31st May 2018

**INDEPENDENT AUDITOR'S REPORTS TO THE MEMBERS OF LONDON
BOROUGH OF LEWISHAM**

Statement of Responsibilities & Independent Auditor's Reports

Statement of Responsibilities & Independent Auditor's Reports

Statement of Responsibilities & Independent Auditor's Reports

Core Financial Statements

SECTION 1 - CORE FINANCIAL STATEMENTS

COMPREHENSIVE INCOME AND EXPENDITURE STATEMENT FOR THE YEAR ENDING 31ST MARCH 2018

2016/17				2017/18			Note
Gross Expenditure £000s	Gross Income £000s	Net Expenditure £000s	SERVICE	Gross Expenditure £000s	Gross Income £000s	Net Expenditure £000s	
379,729	(305,440)	74,289	Children & Young People Directorate	251,594	(310,848)	(59,254)	
174,877	(72,459)	102,418	Community Services Directorate	171,781	(92,334)	79,447	
333,855	(274,771)	59,084	Customer Services Directorate	330,008	(271,004)	59,004	
57,899	(45,189)	12,710	Resources & Regeneration Directorate	59,280	(46,343)	12,937	
90,852	(98,510)	(7,658)	HRA	105,107	(100,748)	4,359	
17,606	(11,078)	6,528	Corporate Services	7,305	(5,553)	1,752	
1,054,818	(807,447)	247,371	Cost of Services	925,075	(826,830)	98,245	1
			Other Operating Expenditure				
0	(9,823)	(9,823)	(Gain) / Loss on the disposal of non-current assets	0	(8,182)	(8,182)	
1,632	0	1,632	Levies	1,638	0	1,638	7
1,947	0	1,947	Contribution of housing capital receipts to Government Pool	1,927	0	1,927	19
3,579	(9,823)	(6,244)		3,565	(8,182)	(4,617)	
			Financing and Investment Income and Expenditure				
34,995	0	34,995	Interest payable and similar charges	34,169	0	34,169	
0	0	0	Loan Restructuring	23,314	0	23,314	
0	(3,002)	(3,002)	Interest and Investment Income	0	(3,050)	(3,050)	
57,359	(36,207)	21,152	Net interest on the net defined benefit liability	49,554	(32,512)	17,042	37
92,354	(39,209)	53,145		107,037	(35,562)	71,475	
			Taxation and non-specific Grant Income				
0	(89,527)	(89,527)	Income from Council Tax	0	(97,726)	(97,726)	
0	(74,920)	(74,920)	General Government Grants	0	(58,390)	(58,390)	
0	(15,577)	(15,577)	Recognised Capital Grants and Contributions	0	(18,474)	(18,474)	
0	(87,083)	(87,083)	Non-Domestic Rates income and expenditure	0	(92,188)	(92,188)	
0	(267,107)	(267,107)		0	(266,778)	(266,778)	
		27,165	Deficit/(Surplus) on provision of services			(101,675)	1
		(101,871)	Surplus on revaluation of non-current assets			(154,972)	21
		19,316	Remeasurement of the net defined benefit liability			(38,950)	20, 37
		(82,555)	Other Comprehensive Income and Expenditure			(193,922)	
		(55,390)	Total Comprehensive Income and Expenditure			(295,597)	

Core Financial Statements

MOVEMENT IN RESERVES STATEMENT - YEAR ENDING 31ST MARCH 2018

YEAR ENDING 31ST MARCH 2018	General Fund Balance £000	Earmarked Gen Fund Reserves £000	Sub-Total General Fund £000	Housing Revenue Account £000	Major Repairs Reserve £000	Capital Receipts Reserve £000	Capital Grants Unapplied £000	Total Usable Reserves £000	Unusable Reserves £000	Total Council Reserves £000	Note
Balance at 01 April 2017 Brought Forward	13,000	149,577	162,577	57,123	39,907	55,495	14,132	329,234	1,133,198	1,462,432	
Movement in Reserves during 2017/18											
Surplus or (Deficit) on the provision of services	106,322	0	106,322	(4,647)	0	0	0	101,675	0	101,675	
Other Comprehensive Income and Expenditure	0	0	0	0	0	0	0	0	193,922	193,922	
Total Comprehensive Income and Expenditure	106,322	0	106,322	(4,647)	0	0	0	101,675	193,922	295,597	
Adjustments between accounting basis and funding basis under regulations	(95,776)	0	(95,776)	17,733	(1,436)	(7,145)	3,167	(83,457)	83,457	0	8
Net Increase / (Decrease) before Transfers to Earmarked Reserves	10,546	0	10,546	13,086	(1,436)	(7,145)	3,167	18,218	277,379	295,597	
Transfers to / (from) Earmarked Reserves	(10,546)	10,546	0	0	0	0	0	0	0	0	9, HRA 14, HRA 15
Increase / (Decrease) in 2017/18	0	10,546	10,546	13,086	(1,436)	(7,145)	3,167	18,218	277,379	295,597	
Balance at 31 March 2018 Carried Forward	13,000	160,123	173,123	70,209	38,471	48,350	17,299	347,452	1,410,577	1,758,029	
Note		9		HRA 15	HRA 14	19			20, 21, 22 Coll Fd 3		

Core Financial Statements

MOVEMENT IN RESERVES STATEMENT - YEAR ENDING 31ST MARCH 2017

YEAR ENDING 31ST MARCH 2017	General Fund Balance £000	Earmarked Gen Fund Reserves £000	Sub-Total General Fund £000	Housing Revenue Account £000	Major Repairs Reserve £000	Capital Receipts Reserve £000	Capital Grants Unapplied £000	Total Usable Reserves £000	Unusable Reserves £000	Total Council Reserves £000	Note
Balance at 01 April 2016 Brought Forward	13,000	152,528	165,528	42,894	37,475	57,231	8,149	311,277	1,095,765	1,407,042	
Movement in Reserves during 2016/17											
Surplus or (Deficit) on the provision of services	(33,272)	0	(33,272)	6,107	0	0	0	(27,165)	0	(27,165)	
Other Comprehensive Income and Expenditure	0	0	0	0	0	0	0	0	82,555	82,555	
Total Comprehensive Income and Expenditure	(33,272)	0	(33,272)	6,107	0	0	0	(27,165)	82,555	55,390	
Adjustments between accounting basis and funding basis under regulations	30,321	0	30,321	11,399	(845)	(1,736)	5,983	45,122	(45,122)	0	8
Net Increase / (Decrease) before Transfers to Earmarked Reserves	(2,951)	0	(2,951)	17,506	(845)	(1,736)	5,983	17,957	37,433	55,390	
Transfers to / (from) Earmarked Reserves	2,951	(2,951)	0	(3,277)	3,277	0	0	0	0	0	9, HRA 14, HRA 15
Increase / (Decrease) in 2016/17	0	(2,951)	(2,951)	14,229	2,432	(1,736)	5,983	17,957	37,433	55,390	
Balance at 31 March 2017 Carried Forward	13,000	149,577	162,577	57,123	39,907	55,495	14,132	329,234	1,133,198	1,462,432	
Note		9		HRA 15	HRA 14	19			20, 21, 22 Coll Fd 3		

Core Financial Statements

BALANCE SHEET AS AT 31ST MARCH 2018

31/03/2017 £000		31/03/2018 £000	Note
	Property, Plant & Equipment		
1,229,068	Council Dwellings	1,255,843	10b, HRA 1a, 9
774,672	Other Land and Buildings	1,011,061	10b
27,865	Vehicles, Plant, Furniture and Equipment	25,170	10b
114,893	Infrastructure	117,424	10b
4,982	Community Assets	4,975	10b
76,893	Surplus Assets not Held for Sale	94,623	10b
23,115	Assets under Construction	23,690	10b
2,251,488		2,532,786	
257	Heritage Assets	257	41
0	Investment Property	0	11
2,049	Long Term Investments	2,076	
32,566	Long Term Debtors	44,948	14a
2,286,360	Total Long Term Assets	2,580,067	
280,731	Short Term Investments	310,648	12
0	Assets Held for Sale	0	
181	Inventories	152	
47,486	Debtors	45,541	14b
92,048	Cash and Cash Equivalents	104,250	15
3,637	Prepayments	3,941	
424,083	Current Assets	464,532	
3,532	Bank Overdraft	9,530	15
26,854	Short Term Borrowing	42,468	12
3,758	Provisions (Less than 1 year)	3,378	17
76,453	Creditors	78,193	16
76,789	Receipts in Advance	90,493	18
7,580	PFI Liabilities due within one year	7,945	34d
194,966	Current Liabilities	232,007	
2,515,477	Total Assets less Current Liabilities	2,812,592	
166,126	Long Term Borrowing	179,453	12
4,843	Provisions (More than 1 year)	5,393	17
236,196	Deferred PFI Liabilities	228,124	34d
1,616	Capital Grants Receipts in Advance	1,858	
644,264	Liability related to defined benefit pension scheme	639,735	20, 37
1,053,045	Long Term Liabilities	1,054,563	
1,462,432	NET ASSETS	1,758,029	
	Usable Reserves		
13,000	General Fund Balance	13,000	
149,577	Earmarked Revenue Reserves	160,123	9
57,123	Housing Revenue Account	70,209	HRA 15
39,907	Major Repairs Reserve	38,471	HRA 14
55,495	Usable Capital Receipts Reserve	48,350	19
14,132	Capital Grants Unapplied	17,299	
329,234		347,452	
	Unusable Reserves		
890,273	Revaluation Reserve	1,025,482	21
895,587	Capital Adjustment Account	1,052,696	22
95	Deferred Capital Receipts	93	
(3,841)	Financial Instruments Adjustment Account	(26,450)	
(644,264)	Pensions Reserve	(639,735)	20, 37
3,096	Collection Fund Adjustment Account	5,547	Coll Fd 3
(7,748)	Short Term Compensated Absences Account	(7,056)	
1,133,198		1,410,577	
1,462,432	TOTAL RESERVES	1,758,029	

Core Financial Statements

CASH FLOW STATEMENT FOR THE YEAR ENDING 31ST MARCH 2018

2016/17 £000s		2017/18 £000s	Note
(27,165)	Net surplus or (deficit) on the provision of services	101,675	
105,498	Adjustment to surplus or deficit on the provision of services for non-cash movements	(50,276)	42
(41,131)	Adjustment for items included in the net surplus or deficit on the provision of services that are investing and financing activities	(33,185)	43
37,202	Net Cash flows from Operating Activities	18,214	
(40,791)	Net Cash flows from Investing Activities	(38,838)	45
(6,142)	Net Cash flows from Financing Activities	26,828	46
(9,731)	Net Increase or (decrease) in Cash and Cash Equivalents	6,204	
98,247	Cash and Cash Equivalents at the beginning of the reporting period	88,516	15
88,516	Cash and Cash Equivalents at the end of the reporting period	94,720	15

SECTION 2 - STATEMENT OF ACCOUNTING POLICIES

1. GENERAL PRINCIPLES

The Council is required to prepare an annual Statement of Accounts by the Accounts and Audit (England) Regulations 2015, which require them to be prepared in accordance with proper accounting practices. These practices primarily comprise the Code of Practice on Local Authority Accounting in the United Kingdom 2017/18 and the SERCOP 2017/18, both published by CIPFA, and based on IFRS and statutory guidance under Section 12 of the Local Government Act 2003 (see Glossary for definitions). The accounting convention adopted in the Statement of Accounts is principally historic cost, modified by the revaluation of certain categories of non-current assets and financial instruments. The Statement of Accounts has been prepared on a 'going concern' basis (in other words, on the expectation that the Council will continue to operate in its current form for the foreseeable future).

2. CHANGES IN ACCOUNTING ESTIMATES AND ACCOUNTING POLICIES, MATERIAL ERRORS AND PRIOR PERIOD ADJUSTMENTS

Changes in accounting estimates are accounted for prospectively, i.e. in the current and future years affected by the change and do not give rise to a prior period adjustment. Prior period adjustments may arise from a change in an accounting policy or to correct a material error. Changes in accounting policies are only made when required by proper accounting practices or the change provides more reliable or relevant information about the effect of transactions, other events and conditions on the Council's financial position or financial performance. Where a change is made, it is applied retrospectively (unless stated otherwise) by adjusting opening balances and comparative amounts for the prior period as if the new policy had always been applied. Material errors discovered in prior period figures are corrected retrospectively by amending opening balances and comparative amounts for the prior period.

3. ACCRUALS OF INCOME AND EXPENDITURE

The Council's revenue and capital accounts are prepared on an accruals basis. This means that activity is accounted for in the year that it takes place, not simply when cash payments are made or received. In particular:

- Income from the sale of goods is recognised when the Council transfers the significant risks and rewards of ownership to the purchaser and it is probable that the economic benefits or service potential associated with the transaction will be received by the Council.
- Income from the provision of services is recognised when the Council can measure reliably the percentage of completion of the transaction and it is probable that the economic benefits or service potential associated with the transaction will be received by the Council.
- Income from Council Tax, Non-Domestic Rates and rents is accounted for in the year it is due.
- Interest receivable on investments and payable on borrowings is accounted for respectively as income and expenditure on the basis of the effective interest rate for the relevant financial instrument rather than the cash flows fixed or determined by the contract.
- Expenditure on supplies is accounted for when they are used. When there is a significant gap between the date on which supplies are received and the date of their use, and the value is material, they are carried as inventories on the Balance Sheet.
- Expenditure on services received (including those provided by employees) is accounted for when the services are received rather than when payments are made.

Statement of Accounting Policies

Where income and expenditure have been recognised in the accounts, but cash has not been received or paid, a debtor or creditor for the amount is recorded in the Balance Sheet. Where it is likely that debts may not be settled, a charge is made to revenue for the income that might not be collected and the debtor is impaired.

4. EXCEPTIONAL ITEMS

Where items of expenditure and income are material, their nature and amount are disclosed separately, either in the Comprehensive Income and Expenditure Statement (the "CIES") or in a note to the accounts, depending on their significance.

5. FOREIGN CURRENCY TRANSLATION

Where the Council has entered into a foreign currency transaction, it is converted into sterling at the exchange rate prevailing on the transaction date. Where amounts are outstanding at year end, they are converted at the exchange rate on 31 March. Any material gains or losses are charged to the Financing and Investment Income and Expenditure line in the CIES.

6. VALUE ADDED TAX (VAT)

Income and Expenditure excludes any amounts related to VAT, unless it is irrecoverable from Her Majesty's Revenue and Customs. VAT is paid on invoices received and charged to an input tax account and VAT is collected with income and posted to an output tax account. These accounts are reconciled and claims made to HM Revenue and Customs for the net VAT incurred on a monthly basis.

7. EVENTS AFTER THE BALANCE SHEET DATE

Events after the Balance Sheet date are those events, favourable and unfavourable, that occur between the end of the reporting period and the date when the Statement of Accounts is authorised for issue. Two types of events can be identified:-

- those that give evidence of conditions that existed at the end of the reporting period – the Statement of Accounts is adjusted to reflect such events where they are considered to be material;
- those that are indicative of conditions that arose after the reporting period – the Statement of Accounts is not adjusted to reflect such events. However, where they would have a material effect, disclosure is made in the notes of the nature of the event and its estimated financial effect.

Events taking place after the date of authorisation for issue are not reflected in the Statement of Accounts.

8. OVERHEADS AND SUPPORT SERVICES

The costs of overheads and support services are charged to the services where those budgets are controlled, in line with the organisational structure of the Council. This approach follows a change in the Code of Practice for last year 2016/17. However, overheads and support services still continue to be allocated across the benefiting services to cover statutory requirements (for example, between the General Fund and Housing Revenue Account) and for statutory returns to Central Government.

9. GOVERNMENT GRANTS AND CONTRIBUTIONS

Whether paid on account, by instalments or in arrears, government grants and third party contributions and donations are recognised as due to the Council when there is reasonable assurance that the Council will comply with the conditions attached to the payments, and the grants or contributions will be received. Amounts recognised as due to the Council are not credited to the CIES until conditions attached to the grant or contribution have been satisfied. Conditions are stipulations that specify that the future economic benefits or service potential of the asset acquired using the grant or contribution are required to be consumed by the recipient as specified, or else the future economic benefits or service potential must be returned to the transferor. Amounts received as grants and contributions for which conditions have not been satisfied are carried on the Balance Sheet as receipts in advance. When conditions are satisfied, they are credited to the relevant service line (attributable revenue grants and contributions) or Taxation and Non-Specific Grant Income (non-ring fenced revenue grants and all capital grants) in the CIES.

Statement of Accounting Policies

Where capital grants are credited to the CIES, they are reversed out of the General Fund Balance in the Movement in Reserves Statement (MiRS). Where the grant has yet to be used to finance capital expenditure, it is posted to the Capital Grants Unapplied Reserve. Where it has been applied, it is posted to the Capital Adjustment Account. Amounts in the Capital Grants Unapplied Reserve are transferred to the Capital Adjustment Account once they have been applied to fund capital expenditure.

10. LEASES

Leases are classified as finance leases where the terms of the lease substantially transfer all the risks and rewards incidental to ownership of the property, plant or equipment from the lessor to the lessee. All other leases are classified as operating leases. Where a lease covers both land and buildings, the land and buildings elements are considered separately for classification. Arrangements which do not have the legal status of a lease but convey a right to use an asset in return for payment are accounted for under this policy where the fulfilment of the arrangement is dependent on the use of specific assets.

a) The Council as Lessee**i) Finance Leases**

The Council as lessee does not have any finance leases.

ii) Operating Leases

Rentals paid under operating leases are charged to the CIES as expenditure of the services which benefit from the use of the leased asset. Charges are made on a straight-line basis over the life of the lease, even if this does not match the incidence of payments (e.g. where there is a rent-free period).

b) The Council as Lessor**i) Finance Leases**

When the Council grants a finance lease over a property or item of plant or equipment, the relevant asset is written out of the Balance Sheet as a disposal. At the commencement of the lease, the carrying amount of the asset in the Balance Sheet is written off to the Other Operating Expenditure line in the CIES as part of the gain or loss on disposal. Any gain, representing the Council's net investment in the lease, is credited to the same line in the CIES as part of the gain or loss on disposal (i.e. netted off against the carrying value of the asset at the time of disposal), matched by a lease asset (long-term debtor) in the Balance Sheet. The gain credited to the CIES on disposal is not permitted by statute to increase the General Fund Balance and is required to be treated as a capital receipt. The written-off value of disposals is not a charge against Council Tax, as the cost of fixed assets is fully provided for under separate arrangements for capital financing. Amounts are therefore appropriated to the Capital Adjustment Account from the General Fund Balance in the MiRS.

Where a premium has been received, this is posted out of the General Fund Balance to the Capital Receipts Reserve in the MiRS. Where the amount due in relation to the lease asset is to be settled by the payment of rentals in future financial years, this is posted out of the General Fund Balance to the Deferred Capital Receipts Reserve in the MiRS. When the future rentals are received, the capital receipt for the disposal of the asset is used to write down the lease debtor, and the associated deferred capital receipt is transferred to the Capital Receipts Reserve.

Lease rentals received are apportioned between a charge for the acquisition of the interest in the property, which is applied to write down the lease debtor (together with any premiums received), and finance income (credited to the Financing and Investment Income and Expenditure line in the CIES).

ii) Operating Leases

Where the Council grants an operating lease over a property or item of plant or equipment, the asset is retained on the Balance Sheet. Rental income is credited to the Other Operating Expenditure line in the CIES on a straight-line basis over the life of the lease, even if this does not match the incidence of payments received.

Statement of Accounting Policies

11. INVENTORIES (STOCK)

Highways and fleet stores are valued and included in the Balance Sheet at cost price as a proxy for average price. Revenue accounts are charged with the cost of obsolescent stock written off.

12. LONG TERM CONTRACTS

Long term contracts are accounted for on the basis of charging the Surplus or Deficit on the Provision of Services with the value of works and services received under the contract during the financial year.

13. EMPLOYEE BENEFITS

a) Benefits Payable during Employment

Short-term employee benefits are those which are settled within 12 months of the year-end. They include salaries, paid annual leave and sick leave for current employees and are recognised as an expense in the year in which employees render their services to the Council. An accrual is made for the cost of entitlements (or any form of leave) earned by employees, but not taken before the year-end which employees can carry forward into the next financial year. The accrual is made at the salary rates applicable in the year in which the employee takes the benefit. The accrual is charged to the Surplus or Deficit on the Provision of Services, but then reversed out through the MiRS using the Short Term Compensated Absences Account so that holiday benefits are charged to revenue in the financial year in which the holiday absence occurs. This account shows the differences arising on the General Fund Balance from accruing for compensated absences earned but not taken in the year, e.g. annual leave entitlement carried forward at 31 March each year. Statutory requirements are that the impact on Council Tax is reversed through the Account.

b) Termination and Discretionary Benefits

Termination benefits are amounts payable as a result of a decision by the Council to terminate an officer's employment before their normal retirement date. They are charged on an accruals basis to the relevant Service Cost line in the CIES in the year in which the Council is committed to the termination of the employment of the officer. The Council has an approved scheme to make awards of benefits in the event of early retirements which requires a panel to consider and agree proposals on the grounds of redundancy and/or efficiency and applications for voluntary early retirement from employees.

Where termination benefits have involved the enhancement of pensions, statutory provisions require the General Fund balance to be charged with the amount payable by the Council to the pension fund or pensioner in the year, not the amount calculated according to the relevant accounting standards. In the MiRS, appropriations are required to and from the Pensions Reserve to remove the notional debits and credits for pension enhancement termination benefits and replace them with debits for the cash paid to the pension fund and pensioners and any amounts payable but unpaid at the year-end.

The Council also has restricted powers to make discretionary awards of retirement benefits in the event of early retirements. Any liabilities arising as a result of an award to any member of staff (including teachers) are accrued in the year of the decision to make the award and accounted for using the same policies as are applied to the Local Government Pension Scheme.

Statement of Accounting Policies

c) Post-Employment Benefits

Employees of the Council are members of four separate pension schemes:-

- The Teachers' Pension Scheme, administered by Capita Teachers Pensions for the DfE;
- The NHS Pension Scheme, administered by EA Finance NHS Pensions;
- The London Pension Fund administered by the Local Pensions Partnership (LPP) on behalf of the London Pensions Fund Authority (LPFA);
- The Local Government Pension Scheme (LGPS), administered by Lewisham Council.

These schemes provide defined benefits to members (retirement lump sums and pensions), which are earned as they work for the Council.

(i) Teachers' Pension Scheme and the NHS Pension Scheme

These schemes are defined benefit schemes, but are accounted for as if they were defined contributions schemes, since their liabilities cannot be separately identified to individual Local Authorities. No liabilities for future payment of benefits are therefore recognised in the Balance Sheet for these schemes. The CIES is charged with the employer's contributions paid to the schemes during the year.

(ii) London Pension Fund Scheme

This scheme is a defined benefit scheme and is accounted for as such, since its liabilities and assets can be identified to individual Councils. The CIES is charged with a levy from the LPFA to meet the employer's contributions and the costs of administration.

(iii) Local Government Pension Scheme

This scheme is a defined benefit scheme and is accounted for as such, since its liabilities and assets are attributable to individual Local Authorities. The Council's attributed liabilities are included in the Balance Sheet on an actuarial basis using the projected unit method – i.e. an assessment of the future payments to be made by the Scheme in relation to benefits earned to date, based on a number of assumptions about mortality rates, turnover, projected earnings etc. These liabilities are discounted to their value at current prices, using a discount rate recommended by the Scheme's Actuaries.

The assets of the Scheme are included in the Balance Sheet at their fair value as follows:-

- Quoted securities – current bid price
- Unquoted securities – professional estimate
- Unitised securities – current bid price
- Property – market value.

The change in the net pensions liability is analysed into the following components:-

- Service Costs comprising
The current service cost which is the increase in liabilities as a result of years of service earned this year. These are allocated in the CIES to the services for which the employees worked.
The past service cost which is the increase in liabilities arising from current year decisions whose effect relates to years of service earned in earlier years. These are debited to the relevant Service Directorate in the Surplus or Deficit on the Provision of Services in the CIES.
- Net interest on the net defined benefit liability
This is the change in the net defined benefit liability that arises from the passage of time charged to the Financing and Investment Income and Expenditure line of the CIES. This is calculated by applying the discount rate to the net defined benefit liability at the beginning of the period, accounting for any changes in the net defined benefit liability during the period as a result of contribution and benefit payments.
- Re-measurement comprising
The return on plan assets excluding amounts included in net interest.
The actuarial gains and losses arising from changes in demographic and financial assumptions since the last actuarial valuation.
Other changes not accounted for elsewhere.

Statement of Accounting Policies

Statutory regulations require Council Tax to fund the amounts payable to the Pension Scheme in the year, rather than the amount calculated according to the relevant accounting standards. The notional entries for assets and liabilities are therefore matched with appropriations to and from the Pension Reserve in the Movement in Reserves Statement. The negative balance on the Pensions Reserve thus measures the beneficial impact on the General Fund of being required to account on the basis of cash flows rather than as benefits are earned by employees.

The detailed accounting policies followed in preparing the pension fund accounts are disclosed separately in the Council's Pension Fund Accounts in Section 8 of the Statement of Accounts.

14. INTERESTS IN COMPANIES

The Council has two wholly owned subsidiary companies, Lewisham Homes and Catford Regeneration Partnership Ltd. It also has a minority interest (significantly lower than 50%) in a number of other companies. The transactions between the Council and all of these companies are included in the Council's accounts. An annual review of the necessity of preparing Group Accounts is undertaken, and for 2017/18 it has again been concluded that the activities of Group's entities are sufficiently material to warrant the production of Group Accounts. See also Section 6 – Group Accounts, and Note 25 - Investment in Companies.

15. REVENUE PROVISIONS AND IMPAIRMENT ALLOWANCES

a) Provisions

The Council has set aside amounts from revenue as provisions which will be used to cover future expenditure. Provisions are made where an event has taken place that gives the Council a legal or constructive obligation that probably requires settlement at a later date and where a reliable estimate can be made of the amount of the obligation. Provisions are charged to the appropriate service line in the CIES in the year that the Council becomes aware of the obligation, and are measured at the best estimate at the Balance Sheet date of the expenditure required to settle the obligation, taking into account relevant risks and uncertainties. When payments are eventually made, they are charged to the provision in the Balance Sheet. All provisions are reviewed at the end of the financial year, and where it is assessed that it is less than probable that a settlement will now be required (or a lower settlement than anticipated is made), the provision is reversed and credited back to the relevant service. Where some or all of the payment required to settle a provision is expected to be recovered from another party (e.g. from an insurance claim), this is only recognised as income for the relevant service if it is virtually certain that reimbursement will be received if the Council settles the obligation.

b) Impairment Allowances

Impairment allowances to cover Council Tax, housing rents and other debtors are set up where it is doubtful that the debts will be settled. A charge is made to the relevant account for the income and is deducted from the current debtors balance on the Balance Sheet. When it is deemed that the debts are irrecoverable they are written off to the impairment allowance. Where payments are made, they are credited to the provision on the Balance Sheet.

16. RESERVES

The Council has set aside specific amounts as reserves to cover future expenditure for contingencies or policy purposes, which fall outside the definition of provisions, and are shown in Note 8 of Section 3. The reserves are created by appropriating amounts out of the General Fund Balance in the MiRS. When expenditure to be financed from a reserve is incurred, it is charged to the appropriate service in that year against the Surplus or Deficit on the Provision of Services in the CIES. The reserve is then credited back to the General Fund Balance in the MiRS so that there is no net charge against Council Tax. Statutory reserves are kept to manage the accounting processes for non-current assets, financial instruments, and retirement and employee benefits and are not available for the Council to use to finance services.

Statement of Accounting Policies

17. CONTINGENT LIABILITIES AND ASSETS

A contingent liability or asset arises where an event has taken place that gives the Council a possible obligation or asset. However, this will only be confirmed by the occurrence or otherwise of another event not wholly within the control of the Council. These are not recognised in the Balance Sheet but are disclosed in a note to the accounts. A contingent liability could also arise in circumstances where a provision would otherwise be made but either it is not probable that a payment will be required or the amount of the obligation cannot be measured reliably.

18. REVENUE EXPENDITURE FUNDED FROM CAPITAL UNDER STATUTE

Expenditure incurred which can be capitalised under statutory provisions but does not result in the creation of a non-current asset for the Council (e.g. home improvement grants or voluntary aided schools expenditure), is charged to the relevant service cost line in the CIES. Where this expenditure is met from existing capital resources or by borrowing, a transfer in the MiRS from the General Fund Balance to the Capital Adjustment Account reverses out the amounts charged so that there is no impact on Council Tax.

19. FINANCIAL INSTRUMENTS**a) Financial Liabilities**

Financial liabilities are recognised on the Balance Sheet when the Council enters into a financial instrument and are initially measured at fair value and carried at their amortised cost. Charges to the Financing and Investment Income and Expenditure line in the CIES for interest payable are based on the carrying amount of the liability, multiplied by its effective rate of interest. This rate exactly discounts estimated future cash payments over its life to the amount at which it was originally recognised. For the Council's borrowings, the amount on the Balance Sheet is the outstanding principal repayable (plus accrued interest), and the interest charged to the CIES is the amount payable for the year for the loan. Where market loans are defined as Lender Option Borrower Option (LOBO's), these are accounted for as short term loans if they have options occurring within the next financial year.

In 2017/18 the Council restructured one of its market loans in what classifies as a substantial modification, given that the variance between the present values of the net cash flows under the modified loan and the cash flows programmed over the remaining life of the original loan is greater than 10%. The increase in debt principal as a result of the restructure has been accounted for by creating a premium which will be charged to the CIES over the remaining life of the loan.

Premiums and discounts from previous year's settlements are charged to the CIES in accordance with regulations requiring the impact on the General Fund and the HRA to be spread over future years. The Council's policy is to spread the gain or loss over the remaining term of the loan repaid on which the premium was payable or discount receivable. As required by statute, the amounts charged to the CIES are adjusted to the required charge against Council Tax or Housing Rents by a transfer to or from the Financial Instruments Adjustment Account in the MiRS. This account holds the accumulated difference between the financing costs charged to the CIES and the accumulated financing costs required to be charged to the General Fund Balance in accordance with regulations.

b) Financial Assets**i) Loans and Receivables**

Loans and receivables are assets that have fixed or determinable payments but are not quoted in an active market. They are recognised on the Balance Sheet initially at fair value and subsequently at their amortised cost, and include short term investments and sundry debtors. The credits to the Financing and Investment Income and Expenditure line in the CIES for interest receivable are based on the carrying amount of the asset multiplied by its effective rate of interest. For loans that the Council has made, this means that the amount shown on the Balance Sheet is the outstanding principal receivable (plus accrued interest) and interest credited to the CIES is the amount receivable for the year for the loan. Any gains and losses that arise on the de-recognition of an asset are credited or debited to the Financing and Investment Income and Expenditure line in the CIES.

Statement of Accounting Policies

ii) Available-for-Sale Assets

These are assets which have a quoted market price and/or do not have fixed or determinable payments. The Council does not have any assets in this category.

20. CASH AND CASH EQUIVALENTS

Cash is represented by cash in hand and deposits with financial institutions repayable without penalty on notice of not more than twenty four hours. Cash equivalents are investments that mature in no more than three months or less from the date of acquisition and are readily convertible to known amounts of cash with insignificant risk of change in value. The Cash Flow Statement shows cash and cash equivalents net of repayable on demand bank overdrafts which form an integral part of the Council's cash management.

21. INTANGIBLE NON CURRENT ASSETS

Intangible Non-Current Assets (e.g. software licences) do not have any physical substance and are identifiable and controllable by the Council through custody or legal rights. The expenditure is only capitalised when it and the future economic benefits or service potential flowing from it are both material. The level of spend on these assets is immaterial and therefore is charged direct to the CIES.

22. NON CURRENT ASSETS - PROPERTY, PLANT AND EQUIPMENT

Assets that have physical substance and are held for use in the production or supply of goods or services, for rental to others, or for administrative purposes and that are expected to be used during more than one financial year are classified as Property, Plant and Equipment.

a) Recognition

Expenditure on the acquisition, creation or enhancement of Property, Plant and Equipment is capitalised on an accruals basis, provided it adds value, increases its ability to deliver future economic benefits or service potential, or can be capitalised as a component and exceeds the Council's de-minimus limit of £40,000. Expenditure financed from the government's Devolved Formula Capital Grant is also capitalised on the basis that it increases the school's service potential. Expenditure that only maintains an asset's value (i.e. repairs and maintenance) and does not increase its ability to deliver benefits or services is charged as revenue expenditure when it is incurred.

b) Measurement and Valuation

Non-current assets are initially measured at cost, comprising the purchase price and any costs attributable to bringing the asset to the location and condition necessary for it to be capable of operating in the manner intended by management. The Council capitalises costs incurred whilst assets are under construction if these costs are directly attributable to an asset and it is probable that future economic benefits will flow to the authority (in accordance with IAS 16). These balances are held on the balance sheet under the category Assets Under Construction and are transferred to the specific non-current assets category when the project reaches practical completion. Non-current assets are carried on the Balance Sheet using the following measurement bases:

- infrastructure, community assets and assets under construction – depreciated historical cost;
- dwellings – current value, using the basis of existing use value for social housing (EUV-SH);
- all other assets – current value, being the amount that would be paid for the asset in its existing use (existing use value – EUV);
- where there is no market-based evidence of fair value because of the specialist nature of an asset, depreciated replacement cost (DRC) is used as an estimate of fair value;
- where non-property assets have short useful lives or low values (or both), depreciated historical cost basis is used as a proxy for fair value.

Non-current assets included in the Balance Sheet at fair value are revalued regularly in accordance with the Statements of Appraisal and Valuation Manual and Guidance Notes issued by the RICS and recommended by CIPFA.

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The cost of an asset acquired other than by purchase is deemed to be its fair value. Donated assets are measured initially at fair value. The difference between fair value and any consideration paid is credited to the Taxation and Non-specific Grant Income line of the CIES. Where the donation has been made conditionally, the gain is held in the Donated Assets Account until conditions are satisfied. Where gains are credited to the CIES, they are reversed out of the General Fund Balance to the Capital Adjustment Account in the MiRS. The Council did not receive any donated assets in 2017/18 (nor in 2016/17).

Increases in valuations are matched by credits to the Revaluation Reserve to recognise unrealised gains. Gains are credited to the CIES where they arise from the reversal of a loss previously charged to a service. Where decreases in value are identified, they are accounted for as follows:

- where there is a balance of revaluation gains for the asset in the Revaluation Reserve, the carrying amount of the asset is written down against that balance (up to the amount of the accumulated gains);
- where there is no or an insufficient balance in the Revaluation Reserve, the carrying amount of the asset is written down against the relevant service line in the CIES.

Surplus Assets not Held for Sale are assets that are not being used to supply goods and services and do not meet the criteria of assets held for sale. The adoption of IFRS 13 requires that these assets are measured at fair value and not existing use value. Fair value is the price that would be received to sell an asset or paid to transfer a liability in an orderly transaction between market participants at the measurement date.

c) Charges to Revenue for Non-Current Assets

All services are charged with the following amounts to reflect the cost of using Property, Plant and Equipment assets during the year:-

- depreciation attributable to the assets used by the relevant service;
- revaluation and impairment losses on assets used by the service (where there are no accumulated gains in the Revaluation Reserve against which the losses can be written off).

These amounts are not required to be charged against Council Tax; however the Council is required to make an annual contribution from revenue (the Minimum Revenue Provision – MRP) to reduce its overall outstanding borrowing, calculated on a prudent basis in accordance with statutory guidance. The difference between the two is accounted for within the Capital Adjustment Account in the Movement in Reserves Statement.

d) Impairment

Non-current assets held on the Balance Sheet are reviewed at year-end to assess whether they may be impaired. Where an impairment exists, the recoverable amount of the asset is estimated and if material, an impairment loss is recognised for the shortfall and is accounted for as follows:-

- where there is a balance of revaluation gains for the asset in the Revaluation Reserve, the carrying amount of the asset is written down against that balance (up to the amount of the accumulated gains);
- where there is no or an insufficient balance in the Revaluation Reserve, the carrying amount of the asset is written down against the relevant service line in the CIES.

Where an impairment loss is reversed subsequently, the reversal is credited to the relevant service line in the CIES, up to the amount of the original loss, adjusted for depreciation that would have been charged if the loss had not been recognised.

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e) Depreciation

Depreciation is charged on all Property, Plant and Equipment assets by applying the straight-line method based on the asset's useful life. Depreciation is not charged for assets with an indeterminable finite useful life, a long life such that depreciation would be immaterial, assets where the recoverable amount exceeds the carrying amount (i.e. freehold land, community assets) and assets under construction. Depreciation is calculated on the following bases:

- council dwellings – 40 years
- other land & buildings (including hostels) – 40 years
- vehicles, plant & equipment – range of 5 to 20 years
- infrastructure – range of 10 to 40 years (but the majority being 25 years)

The Council's policy is to charge depreciation on the assets value at 1 April each year. It is charged from the year following the date of purchase or completion of construction, and is not adjusted for disposals or additions of assets during the year. Where an asset has major components whose cost is significant in relation to the total cost of the item, the components are depreciated separately. Revaluation gains are also depreciated, with an amount equal to the difference between current value depreciation charged on assets and the depreciation that would have been chargeable based on their historical cost being transferred each year from the Revaluation Reserve to the Capital Adjustment Account.

f) Non-Current Assets Held for Sale

When it is almost certain that the carrying amount of an asset will be recovered principally through a sale transaction rather than through its continuing use, and the strict criteria set out in the COP are met, it is reclassified as an Asset Held for Sale. The asset is revalued immediately before reclassification and then carried at the lower of this amount and fair value less costs to sell. Where there is a subsequent decrease to fair value less costs to sell, the loss is posted to the Other Operating Expenditure line in the CIES. Gains in fair value are recognised only up to the amount of any previously losses recognised in the Surplus or Deficit on Provision of Services. Depreciation is not charged on Assets Held for Sale. Assets that are to be abandoned or scrapped are not reclassified as Assets Held for Sale.

When assets no longer meet the criteria to be classified as Assets Held for Sale, they are reclassified back to non-current assets and valued at the lower of their carrying amount before they were classified as held for sale; adjusted for depreciation or revaluations that would have been recognised had they not been classified as Held for Sale, and their recoverable amount at the date of the decision not to sell.

g) Disposals of Non-Current Assets

When an asset is disposed of or decommissioned, the carrying amount in the Balance Sheet is written off to the Other Operating Expenditure line in the CIES as part of the gain or loss on disposal. Any receipts from disposals are credited to the same line in the CIES also as part of the gain or loss on disposal (i.e. netted off against the carrying value of the asset at the time of disposal). Any revaluation gains accumulated for the asset in the Revaluation Reserve are transferred to the Capital Adjustment Account.

Amounts received for asset disposals are classified as capital receipts. A proportion of receipts from housing disposals (as per the relevant regulations) are payable to the Government. The retained receipts are required to be credited to the Usable Capital Receipts Reserve, and can only be used to finance new capital investment or set aside to reduce the Council's underlying need to borrow. Receipts are appropriated to the Reserve from the General Fund Balance in the MiRS. The written-off value of disposals is not a charge against Council Tax. Amounts are appropriated to the Capital Adjustment Account from the General Fund Balance in the MiRS.

h) Deferred Capital Receipts

This reserve holds the gains recognised on the disposal of non-current assets but for which a cash settlement has yet to take place. Under statutory arrangements, the Council does not treat these gains as usable for financing new capital expenditure until they are backed by cash receipts. When the cash settlement eventually takes place, the amounts are transferred to the Usable Capital Receipts Reserve.

Statement of Accounting Policies

23. HERITAGE ASSETS

These are assets which are primarily held for their contribution to knowledge or culture, however, where they are used as operational assets, they are classified as such. They are recognised and measured in accordance with the accounting policies on Property, Plant and Equipment in respect of revaluation, impairment and disposal. The Council has, however, opted not to depreciate these assets since they are enduring by nature. The threshold for disclosure is £40,000.

24. INVESTMENT PROPERTIES

The Council no longer holds any Investment Properties – these were all reclassified to Property, Plant & Equipment in a previous year (2015/16) as part of a review resulting from IFRS 13 – Fair Value Measurement.

25. PRIVATE FINANCE INITIATIVE (PFI) CONTRACTS

These are agreements to receive services where the responsibility for making available the assets needed to provide the services passes to the PFI contractor. As the Council is deemed to control the services that are provided under its PFI schemes and as ownership of the assets will pass to the Council at the end of the contracts for no additional charge, the Council carries the assets used under the contracts on its Balance Sheet as part of Property, Plant and Equipment. The original recognition of these assets at fair value is balanced by the recognition of a liability for amounts due to the scheme operator to pay for the capital investment. Where schemes include a capital contribution, the liability is written down accordingly. Non-current assets recognised on the Balance Sheet are revalued and depreciated in the same way as other non-current assets owned by the Council. The amounts payable to the PFI operators each year are analysed into the following five elements:

- fair value of the services received during the year – debited to the relevant service in the CIES;
- finance cost – an interest charge on the outstanding Balance Sheet liability, debited to Interest Payable and Similar Charges in the CIES;
- contingent rent – increases in the amount to be paid for the asset arising during the contract, debited to Interest Payable and Similar Charges in the CIES;
- payment towards liability – applied to write down the liability towards the PFI operator;
- lifecycle replacement costs – recognised as prepayments in the Balance Sheet and then recognised as non-current assets on the Balance Sheet when the work is carried out.

26. ACCOUNTING FOR SCHOOLS

Schools' accounting policies are the same as the Council's, with their income and expenditure being attributed to the appropriate service line in the CIES and their assets, liabilities and balances being included on the Balance Sheet. Schools' earmarked reserves are shown separately within Note 9 to the Core Financial Statements. An analysis of Dedicated Schools' Grant (the main source of funding for schools) is shown in Note 29. Any critical judgements made relating to accounting for schools' non-current assets (i.e. land and buildings) are shown in Note 3.

Notes to the Core Financial Statements

SECTION 3 – NOTES TO THE CORE FINANCIAL STATEMENTS

1. EXPENDITURE AND FUNDING ANALYSIS – YEAR ENDING 31ST MARCH 2018

The objective of the Expenditure and Funding Analysis is to demonstrate to council tax [and rent] payers how the funding available to the authority (i.e. government grants, rents, council tax and business rates) for the year has been used in providing services in comparison with those resources consumed or earned by authorities in accordance with generally accepted accounting practices. The Expenditure and Funding Analysis also shows how this expenditure is allocated for decision making purposes between the Council's directorates. Income and expenditure accounted for under generally accepted accounting practices is presented more fully in the Comprehensive Income and Expenditure Statement.

SERVICE	Net Expenditure Chargeable to the General Fund and HRA Balances £'000	Adjustments between Funding and Accounting Basis (see Notes to EFA (i)) £'000	Net Expenditure in the CIES £'000
Children & Young People Directorate	57,538	(116,792)	(59,254)
Community Services Directorate	74,594	4,853	79,447
Customer Services Directorate	55,170	3,834	59,004
Resources & Regeneration Directorate	4,314	8,623	12,937
HRA	(13,865)	18,224	4,359
Corporate Services	(27)	1,779	1,752
Cost of Services	177,724	(79,479)	98,245
Other Income and Expenditure	(199,920)	0	(199,920)
(Surplus) or Deficit	(22,196)	(79,479)	(101,675)

Opening General Fund and HRA Balance at 01 April 2017	(259,607)
Add (Surplus)/ Deficit on General fund and HRA Balance in Year	(22,196)
Closing General Fund and HRA Balance at 31 March 2018	(281,803)

Analysed between General Fund and HRA Balances			
	General Fund	HRA	Total
Opening General Fund and HRA Balance at 01 April 2017	(162,577)	(97,030)	(259,607)
Add (Surplus)/ Deficit on General fund and HRA Balance in Year	(10,546)	(11,650)	(22,196)
Closing General Fund and HRA Balance at 31 March 2018	(173,123)	(108,680)	(281,803)

Notes to the Core Financial Statements

EXPENDITURE AND FUNDING ANALYSIS – YEAR ENDING 31ST MARCH 2017

SERVICE	Net Expenditure Chargeable to the General Fund and HRA Balances £'000	Adjustments between Funding and Accounting Basis (see Notes to EFA (i)) £'000	Net Expenditure in the CIES £'000
Children & Young People Directorate	53,797	20,492	74,289
Community Services Directorate	94,883	7,535	102,418
Customer Services Directorate	55,939	3,145	59,084
Resources & Regeneration Directorate	4,121	8,589	12,710
HRA	(17,479)	9,821	(7,658)
Corporate Services	15,235	(8,707)	6,528
Cost of Services	206,496	40,875	247,371
Other Income and Expenditure	(220,206)	0	(220,206)
(Surplus) or Deficit	(13,710)	40,875	27,165

Opening General Fund and HRA Balance at 01 April 2016	(245,897)
Add (Surplus)/ Deficit on General fund and HRA Balance in Year	(13,710)
Closing General Fund and HRA Balance at 31 March 2017	(259,607)

Analysed between General Fund and HRA Balances			
	General Fund	HRA	Total
Opening General Fund and HRA Balance at 01 April 2016	(165,528)	(80,369)	(245,897)
Add (Surplus)/ Deficit on General fund and HRA Balance in Year	2,951	(16,661)	(13,710)
Closing General Fund and HRA Balance at 31 March 2017	(162,577)	(97,030)	(259,607)

Notes to the Core Financial Statements

Notes to the EFA

(i) Adjustments between Funding and Accounting Basis

Adjustments from General Fund to arrive at the CIES amounts	2017/18			
	Adjustment for Capital Purposes £'000	Net change for the Pensions Adjustments £'000	Other Differences £'000	Total Adjustments £'000
SERVICE				
Children & Young People Directorate	(128,863)	12,798	(727)	(116,792)
Community Services Directorate	2,855	1,998	0	4,853
Customer Services Directorate	3,709	2,555	(2,430)	3,834
Resources & Regeneration Directorate	7,088	1,521	14	8,623
HRA	15,335	3,011	(122)	18,224
Corporate Services	(33,490)	12,538	22,731	1,779
Cost of Services	(133,366)	34,421	19,466	(79,479)
Other Income and Expenditure	0	0	0	0
Difference between General Fund surplus or deficit and CIES surplus or deficit	(133,366)	34,421	19,466	(79,479)

Adjustments from General Fund to arrive at the CIES amounts	2016/17			
	Adjustment for Capital Purposes £'000	Net change for the Pensions Adjustments £'000	Other Differences £'000	Total Adjustments £'000
SERVICE				
Children & Young People Directorate	13,667	3,689	3,136	20,492
Community Services Directorate	6,987	558	(10)	7,535
Customer Services Directorate	7,391	693	(4,939)	3,145
Resources & Regeneration Directorate	8,185	404	0	8,589
HRA	7,879	2,427	(485)	9,821
Corporate Services	(23,776)	15,371	(302)	(8,707)
Cost of Services	20,333	23,142	(2,600)	40,875
Other Income and Expenditure	0	0	0	0
Difference between General Fund surplus or deficit and CIES surplus or deficit	20,333	23,142	(2,600)	40,875

Notes to the Core Financial Statements

(ii) Segmental Income and Expenditure

	2017/18
	£'000
Revenues from external customers	(236,465)
Revenues from transactions with other operating segments of the authority	0
Interest revenue	(3,050)
Interest expense	34,169
Depreciation and amortisation	(98,431)
Material items of income and expense (related to disposals of PPE and investments and reversals of provisions)	(8,182)
The authority's interest in the profit or loss of associates and joint ventures accounted for by the equity method	0
Income tax expense or income	0
Material non-cash items other than depreciation and amortisation	0

	2016/17
	£'000
Revenues from external customers	(220,114)
Revenues from transactions with other operating segments of the authority	0
Interest revenue	(3,002)
Interest expense	34,995
Depreciation and amortisation	61,954
Material items of income and expense (related to disposals of PPE and investments and reversals of provisions)	(9,823)
The authority's interest in the profit or loss of associates and joint ventures accounted for by the equity method	0
Income tax expense or income	0
Material non-cash items other than depreciation and amortisation	0

2. ACCOUNTING STANDARDS ISSUED, NOT ADOPTED IN THE 2017/18 ACCOUNTS

The Code of Practice requires the disclosure of information relating to the expected impact of an accounting change that will be required by a new standard that has been issued, but not yet adopted. This applies to the adoption of the following new or amended standards within the Code:

- Leases: IFRS 16 will require lessees to recognise most leases on their balance sheet – this is a significant change from current practice. Lessees will have a single accounting model for all leases, with two exemptions (low value assets and short term leases). Lessor accounting will be substantially unchanged. The new standard will come into effect in financial year 2018/19 (that is, from 1st January 2019, with limited early application permitted). Therefore, there is no impact on the 2017/18 Accounts. In 2018/19, as regards the Council as lessee, an initial assessment indicates that the current annual charge to the CIES of £1.5m will increase slightly to £1.6m, and the Existing Use Value of the leases would add approximately £18.8m to the balance sheet.

Notes to the Core Financial Statements

- Financial Instruments: IFRS 9 replaces IAS 39 from April 2018 and will require the Council to comprehensively review its existing financial instruments and their ongoing accounting treatment, to ensure that assets are classified and measured at fair value initially, with any changes in fair value recognised in the CIES as and when they arise. The standard also introduces an “expected credit loss” model for the impairment of assets, loans and receivables which assesses the risk that a loan/receivable will default while taking into account the Council’s business reasons for holding those assets. The overall impact of the new standard to the Council is still yet to be fully assessed, although in general the authority currently deals in fairly simple ‘vanilla’ instruments which may lessen the overall impact. Officers will work in year to develop and adapt any existing business practices in order to meet the requirements of the new standard and fully understand the financial impact on the Council.

3. CRITICAL JUDGEMENTS IN APPLYING ACCOUNTING POLICIES

In applying the Accounting Policies the Council has had to make certain judgements about complex transactions (shown in this note) and a number of assumptions which involve uncertainty about future events (shown in the following note). The major judgements made are as follows:

- a. There is uncertainty about future levels of funding for local government. However, the Council has concluded that it is unlikely that the assets of the Council will be impaired as a result of the actions required to achieve the necessary savings, including closing facilities and reducing services.
- b. A number of judgements have been made under IFRS concerning the classification of and the accounting for Non-Current Assets, Investment Properties, Leases, PFI and other major contracts, Capital and Revenue Grants and other miscellaneous items. The adoption of IFRS 13 Fair Value Measurement in 2015/16 led to an assessment of the Council’s Investment Properties and their reclassification to Property, Plant & Equipment (for further details, see Note 24 – Investment Properties – in Accounting Policies above). In summary, there are no material changes to these judgements for the 2017/18 Accounts compared to those for last year.
- c. An accounting judgement has been made for each school as to whether their land and buildings should be included within the Council’s Balance Sheet:-
 - Included are 41 Community Primary Schools, 5 Community Secondary Schools, 3 Community Special Schools, 2 Foundation Schools and 2 Nursery Schools (53 schools).
 - Excluded are 23 Voluntary-aided Schools, 3 Foundation Schools, 4 Academies and 3 Other Schools (33 schools).
 - Also excluded are assets acquired via PFI contracts where they relate to the excluded schools given above, although the PFI liability remains with the Council.
- d. A judgement has been made by the Council that it is proper practice to prepare Group Accounts for 2017/18, on grounds of materiality. For further information, see Section 2 – Accounting Policies (para. 14 – Interests in Companies); also Section 6 – Group Accounts; and Note 25 – Investment in Companies.
- e. The Council has previously agreed that it will indemnify all the pension costs of Lewisham Homes staff. The Council’s judgement is that this indemnity is most accurately represented by accounting for the liability under IAS 19, rather than as an accrual, provision, reserve or contingent liability. The Council’s 2017/18 Single Entity Accounts therefore include the full costs of the Lewisham Homes IAS 19 liability and are consistent with the Council’s 2016/17 Accounts and Lewisham Homes’ Accounts for both years.

Notes to the Core Financial Statements

4. ASSUMPTIONS MADE ABOUT THE FUTURE AND OTHER MAJOR SOURCES OF ESTIMATION UNCERTAINTY

These Accounts contain a number of estimated figures that are based on assumptions made about the future or that are otherwise uncertain, and take into account historical experience, current trends and other relevant factors. Because of this, the actual outcomes could be materially different from the assumptions and estimates made. The areas in the Council's Accounts at 31st March 2018 for which there is a significant possibility of material adjustment in the forthcoming financial year are as follows:-

a) Property, Plant and Equipment

Non-Current Assets are depreciated over their useful lives which are partially dependent on assumed levels of repairs and maintenance that will be achieved. However the current economic climate makes it uncertain that the Council will be able to sustain its current level. If the useful life of assets is reduced, the depreciation will increase and the carrying amount of the assets will decrease. The annual depreciation charge for buildings could increase by approximately £1m for every year that useful lives are reduced. For further information on Non-Current Assets, see Note 10.

b) Insurance Provisions

The insurance provision is made up of contributions to cover liabilities arising over a number of years. It is split between less than and greater than one year, estimating what proportion of the monies held relate to each of the years, what has been paid in each of those years and what remains outstanding. An annual review is commissioned from insurance advisors to inform this split. The balance on the provision < 1 year at 31st March 2018 is £2.5m, and so an increase over the forthcoming year of 10% in the total number of claims or in the average settlement could add £0.25m to the provision needed.

c) Non-Domestic Rates - Appeals

Since the introduction of the Business Rates Retention Scheme from 1st April 2013, Councils are liable for successful appeals against NDR charged to businesses in 2017/18 and earlier financial years in their proportionate share. Therefore, a provision has been raised for the estimate of the amount that businesses have been overcharged up to 31st March 2018, using the Valuation Office (VOA) ratings list of appeals and the analysis of successful appeals to date. The balance on this provision at 31st March 2018 is £2.0m.

d) Arrears of Significant Debtors

The Council had debtors balances of Council Tax, Non Domestic Rates, Housing Rents and sundry others of £120.8m as at 31st March 2018. All of the significant balances have been reviewed and impairment allowances for doubtful debts have been set at appropriate levels, with an overall impairment allowance of £75.5m. Although the current economic climate, including the Government's welfare benefits reform initiative, has been taken into account, it is not certain that these allowances will be sufficient, as the judgements made are mainly based on historical trends. If collection rates were to deteriorate, an increase of 10% in the amount of the impairment allowance would require an additional sum of £7.5m to be set aside.

e) Pensions Liability

Estimation of the net liability to pay pensions depends on a number of complex judgements relating to the discount rate used, the rate at which salaries are projected to increase, changes in retirement ages, mortality rates and expected returns on pension fund assets. A firm of consulting actuaries is engaged to provide the Council with expert advice about the assumptions to be applied. The effects on the net pensions liability of changes in individual assumptions can be measured and are outlined in the Defined Benefits note to these Accounts (Note 37).

5. MATERIAL ITEMS OF INCOME AND EXPENDITURE

There are no material items of Income and Expenditure that are not disclosed elsewhere in these Accounts.

Notes to the Core Financial Statements

6. EVENTS AFTER THE BALANCE SHEET DATE

The pre-audit Statement of Accounts was authorised for issue by the Executive Director for Resources and Regeneration at the end of May 2018. Events taking place after this date are not reflected in the accounts. Where events took place before this date which materially altered the conditions existing at 31st March 2018, the figures in the financial statements and notes have been adjusted in all material respects to reflect these altered conditions.

St George's CE Primary School became an academy on 1st May 2018 and this will be reflected in Council's DSG funding for 2018/19. This will have no effect on the Council's balance sheet, because the school's land and buildings are already excluded as being those of a voluntary-aided school (see Note 3 – Critical Judgements in Applying Accounting Policies – paragraph C).

7. OTHER OPERATING EXPENDITURE - LEVIES

These are included under the "Other Operating Expenditure" line in the Comprehensive Income and Expenditure Statement, and comprises the statutory levies for services carried out by other bodies.

	2017/18 £000	2016/17 £000
London Pension Fund Authority	1,241	1,229
Lee Valley Regional Park Authority	213	224
Environment Agency	184	179
Total Levies Paid	1,638	1,632

8. TECHNICAL NOTE: AN ANALYSIS OF THE MOVEMENT IN RESERVES STATEMENT ADJUSTMENTS BETWEEN THE ACCOUNTING BASIS AND FUNDING BASIS

This note details the adjustments that are made to the CIES recognised by the Council in the year in accordance with proper accounting practice to the resources that are specified by statutory provisions as being available to the Council to meet future capital and revenue expenditure. The total of these adjustments appears as a line on the Movement in Reserves Statement.

Notes to the Core Financial Statements

2017/18	Usable Reserves					Movement in Unusable Reserves £'000
	General Fund Balance £'000	Housing Revenue Account £'000	Major Repairs Reserve £'000	Capital Receipts Reserve £'000	Capital Grants Unapplied £'000	
Adjustments to Revenue Resources						
Amounts by which income and expenditure included in the Comprehensive Income and Expenditure Statement are different from revenue for the year calculated in accordance with statutory requirements:						
Pensions costs (transferred to/ from the Pensions Reserve)	31,410	3,011				(34,421)
Financial instruments (transferred to the Financial Instruments Adjustment Account)	22,731	(122)				(22,609)
Council Tax and NDR (transfers to/ from Collection Fund Adjustment Account)	(2,451)					2,451
Holiday Pay (transferred to the Accumulated Absences Account)	(692)					692
Reversal of entries included in the Surplus/ Deficit on the Provision of Services in relation to capital expenditure (these items are charged to the Capital Adjustment Account (CAA))	(121,042)	29,267	(951)			92,726
Total Adjustments to Revenue Resources	(70,044)	32,156	(951)	0	0	38,839
Adjustments between Revenue and Capital Resources						
Transfer of non-current asset sale proceeds from revenue to the Capital Receipts Reserve	(1,986)	(11,608)		13,596		(2)
Payments to the Government housing receipts pool (funded by a contribution from the Capital Receipts Reserve)	1,927			(1,927)		0
Statutory provision for the repayment of debt (transfer from the CAA)	(10,580)	(2,662)				13,242
Revenue Expenditure Funded from Capital under Statute	10,925					(10,925)
Capital expenditure funded from revenue balances (transfer to the CAA)	(6,428)	(153)				6,581
Total Adjustments between Revenue and Capital Resources	(6,142)	(14,423)	0	11,669	0	8,896
Adjustments to Capital Resources						
Use of the Capital Receipts Reserve to finance capital expenditure				(18,814)		18,814
Use of the Major Repairs Reserve to finance capital expenditure			(485)			485
Application of capital grants to finance capital expenditure	(19,590)				3,167	16,423
Total Adjustments to Capital Resources	(19,590)	0	(485)	(18,814)	3,167	35,722
Total Adjustments	(95,776)	17,733	(1,436)	(7,145)	3,167	83,457

Notes to the Core Financial Statements

2016/17	Usable Reserves					Movement in Unusable Reserves £'000
	General Fund Balance £'000	Housing Revenue Account £'000	Major Repairs Reserve £'000	Capital Receipts Reserve £'000	Capital Grants Unapplied £'000	
Adjustments to Revenue Resources						
Amounts by which income and expenditure included in the Comprehensive Income and Expenditure Statement are different from revenue for the year calculated in accordance with statutory requirements:						
Pensions costs (transferred to/ from the Pensions Reserve)	20,715	2,427				(23,142)
Financial instruments (transferred to the Financial Instruments Adjustment Account)	(301)	(485)				786
Council Tax and NDR (transfers to/ from Collection Fund Adjustment Account)	(4,934)					4,934
Holiday Pay (transferred to the Accumulated Absences Account)	3,121					(3,121)
Reversal of entries included in the Surplus/ Deficit on the Provision of Services in relation to capital expenditure (these items are charged to the Capital Adjustment Account (CAA))	40,922	30,801	0			(71,723)
Total Adjustments to Revenue Resources	59,523	32,743	0	0	0	(92,266)
Adjustments between Revenue and Capital Resources						
Transfer of non-current asset sale proceeds from revenue to the Capital Receipts Reserve	(3,133)	(16,226)		19,364		(5)
Payments to the Government housing receipts pool (funded by a contribution from the Capital Receipts Reserve)	1,947			(1,947)		0
Statutory provision for the repayment of debt (transfer from the CAA)	(10,696)	(2,460)				13,156
Revenue Expenditure Funded from Capital under Statute	5,799					(5,799)
Capital expenditure funded from revenue balances (transfer to the CAA)	(1,207)	(2,658)				3,865
Total Adjustments between Revenue and Capital Resources	(7,290)	(21,344)	0	17,417	0	11,217
Adjustments to Capital Resources						
Use of the Capital Receipts Reserve to finance capital expenditure				(19,153)		19,153
Use of the Major Repairs Reserve to finance capital expenditure			(845)			845
Application of capital grants to finance capital expenditure	(21,912)				5,983	15,929
Total Adjustments to Capital Resources	(21,912)	0	(845)	(19,153)	5,983	35,927
Total Adjustments	30,321	11,399	(845)	(1,736)	5,983	(45,122)

Notes to the Core Financial Statements

9. EARMARKED RESERVES

The Council has a number of earmarked reserves on its Balance Sheet. Some are required to be held for statutory reasons, some are needed to comply with proper accounting practice, and others have been set up to provide resources for future spending plans. This note shows the amounts used to meet General Fund expenditure in 2017/18 and amounts set aside in the year to finance future expenditure plans. The use of HRA earmarked reserves is shown in the notes to the HRA in Section 4.

Name of Reserve	Balance	2017/18 Transfers		Balance	
	31/03/17 £000	Out £000	In £000	31/03/18 £000	
Specific Revenue Earmarked	71,343	(14,355)	12,163	69,151	(a)
PFI and BSF Schemes	23,892	0	2,172	26,064	(b)
New Homes Bonus Reserve	20,036	(5,325)	9,699	24,410	(c)
Insurance	16,729	(600)	295	16,424	(d)
Capital Programme Expenditure	929	(8,787)	8,735	877	(e)
	132,929	(29,067)	33,064	136,926	
Schools Reserves and External Funds	16,648	(19,406)	25,954	23,196	(f)
	16,648	(19,406)	25,954	23,196	
Total	149,577	(48,473)	59,018	160,122	

a) Specific Earmarked Reserves

These comprise a number of specific reserves which are earmarked for particular purposes.

The Transfers In include £10.9m in 2017/18 due to the reclassification of Creditors after a review to ensure that the accounts are consistent with the Whole of Government Accounts

b) PFI and BSF Schemes Reserves

These reserves enable services to make revenue contributions towards their committed PFI and Building Schools for the Future (BSF) schemes in future years. This now includes the Street Lighting PFI Sinking Fund which was previously reported under the "Specific Revenue Earmarked Reserves" line.

c) New Homes Bonus Reserve

The reserve is made up of unused grant from central government. The grant is based on the amount of extra Council Tax revenue raised for new-build homes, conversions and long-term empty homes brought back into use. Use of the reserve is not ring-fenced.

d) Insurance Reserve

This has been established in order to supplement the insurance provision and covers potential costs arising from self-insured risks.

e) Capital Programme Expenditure Reserve

This reserve will be used to finance capital programme expenditure in future years. £2m has been allocated from Revenue reserves in 2017/18 to fund Capital written off to revenue in year. This was needed due to a delay in planned Capital Receipts being received. It is anticipated that this will be repaid in 2018/19 when the receipts are received.

f) Schools Reserves and Schools External Funds

The Schools Reserves consist of the unspent year-end balances from schools' self-managed budgets. School External Funds are unspent balances from schools' locally generated funds. All these balances are earmarked to be used by schools in future years.

Notes to the Core Financial Statements

10. NON CURRENT ASSETS**a) Non-Current Assets Revaluations**

Assets are valued at least every five years as a minimum or more regularly where a five-yearly valuation is insufficient to keep pace with material changes in fair value, to ensure that the Council's assets are valued in accordance with RICS and CIPFA guidance. The valuations this year were undertaken and signed off by the valuers Wilkes, Head and Eve. Where revaluations have occurred in 2017/18, their exact effective date was 28th February 2018 for council dwellings and 31st January 2018 for other assets.

	Council Dwellings £000	Other Land & Buildings £000	Surplus Assets £000	Total £000
Valued at Historic Cost	0	1,879	10,223	12,102
Valued at Current Value				
2017/18	1,220,379	843,038	82,097	2,145,514
2016/17	35,464	165,519	403	201,386
2015/16	0	57	1,900	1,957
2014/15	0	0	0	0
2013/14	0	568	0	568
Total Net Book Value	1,255,843	1,011,061	94,623	2,361,527

b) Movements in Non-Current Assets

The movements in non-current assets during 2017/18 were as follows:

Notes to the Core Financial Statements

2017/18	Council Dwellings £000	Other Land & Buildings £000	Vehicles, Plant & Equipment £000	Infra-structure Assets £000	Comm. Assets £000	Surplus Assets £000	Assets under Construction £000	TOTAL £000
Gross Book Value b/fwd at 1st April 2017	1,229,227	775,614	53,750	170,686	5,013	77,693	23,115	2,335,098
Additions	1,734	1,836	1,901	9,264	16	7,939	10,908	33,598
Revaluations (recognised in Revaluation Reserve)	46,151	84,706	0	0	0	(1,554)	0	129,303
Revaluations (recognised in Surplus/ Deficit on the Provision of Services)	(52)	147,847	0	0	0	(3,215)	0	144,580
Impairments (recognised in Revaluation Reserve)	0	(2,991)	0	0	0	(311)	0	(3,302)
Impairments (recognised in Surplus/ Deficit on the Provision of Services)	0	(1,371)	0	0	0	(1,508)	0	(2,879)
Disposals	(5,410)	(278)	(2,387)	0	0	0	0	(8,075)
Transfers	(14,979)	9,114	0	421	0	15,777	(10,333)	0
Gross Book Value c/fwd at 31st March 2018	1,256,670	1,014,477	53,264	180,370	5,029	94,821	23,690	2,628,321
Depreciation b/fwd at 1st April 2017	(159)	(942)	(25,885)	(55,793)	(31)	(800)	0	(83,610)
Depreciation for year	(22,059)	(14,797)	(4,584)	(7,153)	(23)	(604)	0	(49,220)
<u>Depreciation written back on:</u>								
Transfers	7	0	0	0	0	(7)	0	0
Revaluations (recognised in Revaluation Reserve)	20,367	8,061	0	0	0	542	0	28,970
Revaluations (recognised in Surplus/ Deficit on the Provision of Services)	1,017	4,262	0	0	0	447	0	5,726
Impairments (recognised in Revaluation Reserve)	0	0	0	0	0	0	0	0
Impairments (recognised in Surplus/ Deficit on the Provision of Services)	0	0	0	0	0	224	0	224
Assets Sold	0	0	2,375	0	0	0	0	2,375
Depreciation c/fwd at 31st March 2018	(827)	(3,416)	(28,094)	(62,946)	(54)	(198)	0	(95,535)
Net Book Value at 31st March 2018	1,255,843	1,011,061	25,170	117,424	4,975	94,623	23,690	2,532,786

Notes to the Core Financial Statements

The movements in non-current assets during 2016/17 were as follows:

2016/17	Council Dwellings £000	Other Land & Buildings £000	Vehicles, Plant & Equipment £000	Infra-structure Assets £000	Comm. Assets £000	Surplus Assets £000	Assets under Construction £000	TOTAL £000
Gross Book Value b/fwd at 1st April 2016	1,149,956	795,553	58,976	159,096	7,163	76,026	23,992	2,270,762
Additions	1,564	4,014	3,155	11,666	0	3,693	12,952	37,044
Revaluations (recognised in Revaluation Reserve)	87,636	(13,643)	0	0	0	4,585	0	78,578
Revaluations (recognised in Surplus/Deficit on the Provision of Services)	190	(8,821)	0	0	0	54	0	(8,577)
Impairments (recognised in Revaluation Reserve)	0	(663)	0	0	0	(2,589)	0	(3,252)
Impairments (recognised in Surplus/Deficit on the Provision of Services)	(139)	(889)	(504)	0	(2,581)	(13,142)	(4,550)	(21,805)
Disposals	(9,215)	(560)	(7,877)	0	0	0	0	(17,652)
Transfers	(765)	623	0	(76)	431	9,066	(9,279)	0
Gross Book Value c/fwd at 31st March 2017	1,229,227	775,614	53,750	170,686	5,013	77,693	23,115	2,335,098
Depreciation b/fwd at 1st April 2016	(3,643)	(3,966)	(29,312)	(49,179)	(8)	(369)	0	(86,477)
Depreciation for year	(20,444)	(15,665)	(4,625)	(6,633)	(4)	(526)	0	(47,897)
Depreciation written back on:								
<u>Transfers</u>	30	625	0	19	(19)	(655)	0	0
Revaluations (recognised in Revaluation Reserve)	20,447	6,049	0	0	0	35	0	26,531
Revaluations (recognised in Surplus/Deficit on the Provision of Services)	3,434	11,946	0	0	0	80	0	15,460
Impairments (recognised in Revaluation Reserve)	0	0	0	0	0	0	0	0
Impairments (recognised in Surplus/Deficit on the Provision of Services)	0	65	175	0	0	635	0	875
Assets Sold	17	4	7,877	0	0	0	0	7,898
Depreciation c/fwd at 31st March 2017	(159)	(942)	(25,885)	(55,793)	(31)	(800)	0	(83,610)
Net Book Value at 31st March 2017	1,229,068	774,672	27,865	114,893	4,982	76,893	23,115	2,251,488

Notes to the Core Financial Statements

11. INVESTMENT PROPERTIES

Investment Properties were all reclassified to Property, Plant & Equipment in a previous year (2015/16), hence the nil balance. (See also Section 2 – Accounting Policies – paragraph 24.)

12. FINANCIAL INSTRUMENTS

The Code of Practice requires the accounts to be compliant with IFRS but some of these requirements are not consistent with primary legislation. Where this occurs, the CIES complies with IFRS, with the MiRS containing the reversals required to ensure that the closing balances comply with Statute. The figures shown in the table do not all appear as investments on the face of the balance sheet due to the reclassification of some short term investments as Cash Equivalents under IFRS. Where values are zero, the relevant lines have been excluded from the table.

a) Financial Instruments Balances

	Long-Term		Current		
	31/03/18 £000	31/03/17 £000	31/03/18 £000	31/03/17 £000	
Financial Liabilities (Principal)	179,453	165,910	40,000	25,000	1
Accrued Interest	-	216	2,431	1,854	1
Total Borrowings	179,453	166,126	42,431	26,854	
PFI and Finance Lease liabilities	228,224	236,196	7,945	7,580	
Total Other Liabilities	228,224	236,196	7,945	7,580	
Financial Liabilities at contract amount	-	-	58,186	59,153	2
Total Creditors	-	-	58,186	59,153	

	Long-Term		Current		
	31/03/18 £000	31/03/17 £000	31/03/18 £000	31/03/17 £000	
Loans and Receivables (Principal)	-	-	404,688	368,514	1
Accrued Interest	-	-	680	734	1
Total Investments	-	-	405,368	369,248	
Loans and Receivables	44,948	32,566	-	-	2
Financial Assets at contract amounts	-	-	27,525	31,639	2
Total Debtors	44,948	32,566	27,525	31,639	

1) Under accounting requirements the carrying value of financial instruments is shown in the balance sheet (including the principal amount borrowed or lent and adjustments for accrued interest where relevant). Accrued interest is included in current assets / liabilities where it is due within one year.

2) These are carried at cost as this is a fair approximation of their value. The breakdown of these figures are shown in the appropriate Debtors and Creditors Notes and exclude statutory amounts.

Notes to the Core Financial Statements

Other Required Declarations

There were no reclassifications of financial instruments in the year or the previous year.

There were no unusual movements during the year or the previous year.

The Council provided no financial guarantees in the year and has none outstanding from previous years.

The Council has made no loans to voluntary organisations at less than market rates (soft loans), nor has it received any such loans.

No de-recognition is expected to impact where the Council has transferred financial assets to a third party.

The Council did not hold and did not obtain any collateral for third party debts or other credit enhancements in the year or the previous year.

No allowance for credit losses were made during the year or the previous year.

No defaults or breaches relating to the Council's financial instruments were incurred during the year or the previous year.

Borrowing costs capitalised in the year were £0.474m, at a rate of 4.38%. These were included in interest payable in the CIES.

b) Financial Instruments Gains / (Losses)

The gains and losses recognised in the CIES in relation to financial instruments are as follows (there were no revaluations on financial instruments in 2017/18 or 2016/17, or assets classified as Available for Sale):

	2017/18			2016/17
	Liabilities - Amortised Cost £000	Assets - Loans and Receivables £000	Totals £000	Totals £000
Interest Expense	8,810	-	8,810	9,029
Total Expense in Surplus or Deficit on Provision of Services	8,810	-	8,810	9,029
Interest Income	-	(2,142)	(2,142)	(2,338)
Total Income in Surplus or Deficit on Provision of Services	-	(2,142)	(2,142)	(2,338)
Net (Gain) / Loss for the Year	8,810	(2,142)	6,668	6,691

c) Fair Values of Assets and Liabilities

Financial liabilities and assets represented by loans and receivables are carried on the balance sheet at amortised cost (in long term assets / liabilities with accrued interest in current assets / liabilities). Their fair value can be assessed by calculating the net present value of the cash flows that take place over the remaining life of the instruments, using the following assumptions:

- Borrowing rates from the PWLB have been applied to PWLB loans, termed the New Loan and Premature Repayment Rates;
- For non-PWLB loans, PWLB discount rates as above have been used as a reasonable proxy for market rates;
- For loans receivable prevailing benchmark market rates have been used to provide the fair value;
- No early repayment or impairment is recognised;
- Where an instrument has a maturity of less than 12 months or is a trade or other receivable the fair value is taken to be the carrying amount or the billed amount.

The fair values for loans and receivables have been assessed by reference to Level 2 Inputs, i.e. inputs other than quoted prices that are observable for the financial asset/liability. These give a reasonable estimate for the fair value of a financial instrument, and includes accrued interest.

Notes to the Core Financial Statements

The following tables show the carrying amount of assets and liabilities on the balance sheet compared to the fair value amounts (undisclosed on the balance sheet). The fair value of Public Works Loan Board (PWLB) loans of £122m at the New Loan Rate compares the terms of existing PWLB commitments with the new borrowing rates available from the PWLB, given that the authority has a continuing ability to borrow at concessionary rates from the PWLB rather than from the markets (the Certainty rate).

A supplementary measure of the fair value of PWLB commitments is to compare the terms of these loans with estimates of the terms that would be offered for market transactions undertaken at the Balance Sheet date, which has been assumed as the PWLB Premature Repayment Rate. If the authority were to seek to repay the loans to the PWLB, the PWLB would raise a penalty charge for early redemption, based on the repayment interest rates, for the additional interest that will not now be paid. The exit price for the PWLB loans including the penalty charge would be £144m.

	Premature Repayment Rate		New Loan Rate		Premature Repayment Rate		New Loan Rate	
	31/03/18		31/03/18		31/03/17		31/03/17	
	Carrying Amount £000	Fair Value £000	Carrying Amount £000	Fair Value £000	Carrying Amount £000	Fair Value £000	Carrying Amount £000	Fair Value £000
PWLB Debt	89,945	143,512	89,945	121,980	77,557	130,001	77,557	111,012
Non-PWLB Debt *	131,939	220,451	131,939	179,443	115,423	195,775	115,423	162,336
Total Debt / Liabilities	221,884	363,963	221,884	301,423	192,980	325,776	192,980	273,348
Money Market Investments	411,550	411,702	411,550	411,702	373,191	373,313	373,191	373,313
Long Term Debtors	44,948	44,948	44,948	44,948	32,566	32,566	32,566	32,566
Total Assets	456,498	456,650	456,498	456,650	405,757	405,879	405,757	405,879

*The fair value for non-PWLB debt at the premature repayment rate is provided for illustrative purposes only.

13. NATURE AND EXTENT OF RISKS ARISING FROM FINANCIAL INSTRUMENTS

a) Key Risks

The Council's activities necessarily expose it to a variety of financial risks. The key risks are:

Credit Risk - The possibility that other parties might fail to pay amounts due to the Council;

Liquidity Risk - The possibility that the Council might not have funds available to meet its commitments to make payments;

Re-financing Risk - The possibility that the Council might need to renew a financial instrument on maturity at disadvantageous interest rates or terms;

Market Risk - The possibility that financial loss might arise for the Council as a result of changes in such measures as interest rates movements.

b) Overall Procedures for Managing Risk

The Council's overall risk management procedures focus on the uncertainty of financial markets, and are structured to implement suitable controls to minimise these risks. They set out a legal framework based on the *Local Government Act 2003* and associated regulations, and require the Council to do the following:

- formally adopt the requirements of the CIPFA Treasury Management Code of Practice;
- adopt a Treasury Policy Statement and include treasury management clauses within its financial regulations/standing orders/constitution;
- approve annually in advance prudential and treasury indicators for the following three years.
- approve an investment strategy for the forthcoming year setting out its criteria for investing and selecting investment counterparties in compliance with Government guidance.

Notes to the Core Financial Statements

These procedures are required to be reported and approved at Council before the start of the year to which they relate. These items are reported with the Annual Treasury Management Strategy which outlines the detailed approach to managing risk in relation to the Council's financial instrument exposure. Actual performance is also reported after each year. The annual treasury management strategy which incorporates the prudential indicators was last approved by Council in February 2018 and is available on the Council website. The Council maintains written principles for overall risk management, as well as written policies (Treasury Management Practices) covering specific areas, such as interest rate risk, credit risk, and the investment of surplus cash. These are a requirement of the Code of Practice and are reviewed periodically.

c) Credit Risk

Credit risk arises from deposits with banks and financial institutions, as well as credit exposures to the Council's customers. This risk is minimised through the Annual Investment Strategy, which requires that deposits are not made with financial institutions unless they meet identified minimum credit criteria, in accordance with the Fitch, Moody's and Standard & Poor's Credit Ratings Services. This also considers maximum amounts and time limits in respect of each financial institution. The Council uses the creditworthiness service provided by Capita Asset Services which uses a sophisticated modelling approach with credit ratings from all three rating agencies forming the core element. This is combined with credit watches and credit outlooks in a weighted scoring system, with an overlay of CDS spreads for which the end product is an indication of the relative creditworthiness of counterparties.

The Council's maximum exposure to credit risk in respect of its investments cannot be assessed generally as the risk of any institution failing to make interest payments or repay the principal sum will be specific to that institution. It is rare for institutions to be unable to meet their commitments and a risk applies to all of the Council's deposits, however at the 31 March 2018 there was no evidence that this was likely to happen.

d) Liquidity Risk

The Council manages its liquidity position through the procedures above as well as using a comprehensive cash flow management system, as required by the CIPFA Code of Practice, which ensures that cash is available when needed. The Council has ready access to borrowings from the money markets to cover any day to day cash flow need and the PWLB and money markets for access to longer term funds. All sums invested are either due to be paid in less than one year or can be easily realised.

e) Refinancing and Maturity Risk

The Council maintains a significant debt and investment portfolio. Whilst the cash flow procedures above are considered sufficient to manage the refinancing risk, longer-term risk to the Council relates to managing the exposure to replacing financial instruments as they mature. The approved treasury indicator limits for the maturity structure of debt and the limits placed on investments over one year in duration are the key parameters used to address this risk. The Council approved treasury and investment strategies address the main risks and the corporate treasury team address the operational risks within these parameters.

f) Interest Rate Risk

The Council is exposed to interest rate movements on its borrowings and investments and these impact according to how variable and fixed interest rates move across differing financial instrument periods. The Council has a number of strategies for managing interest rate risk. The Annual Treasury Management Strategy includes expected interest rate movements. A treasury indicator is set which provides maximum limits for fixed and variable interest rate exposure, and this is monitored regularly.

If variable interest rates had been 0.1% higher (with all other variables held constant) the financial effect would be a net increase in income of £0.3m. The impact of a 0.1% fall in interest rates would be a net decrease in income of £0.3m.

Notes to the Core Financial Statements

14. DEBTORS**a) Long Term Debtors**

These consist of sums repayable to the Council over a period of time of more than one year.

	31/03/18 £000	31/03/17 £000
Lewisham Homes - Loan	26,000	14,000
Catford Regeneration Partnership Ltd (CRPL) - Loan	12,034	12,223
Street Lighting PFI Sinking Fund	3,245	3,245
Lewisham Gateway Development - Loan	2,000	2,000
Land Charges Debts	278	384
Mortgages	155	177
Other Long Term Debtors	1,236	537
Total Long Term Debtors	44,948	32,566

a) Lewisham Homes Loan

A loan of £8m was advanced to Lewisham Homes in 2015/16, a further £6m in 2016/17 and a further £12m in 2017/18. (See Section 6 – Group Accounts.)

b) Catford Regeneration Partnership Limited Loan

A loan of £12m was advanced to CRPL in 2010/11, followed by further loans of £0.25m in 2015/16 and £1m in 2016/17. (See Section 6 – Group Accounts.)

c) Street Lighting PFI Sinking Fund

This fund is held by LB Croydon on behalf of the Council in their role as lead borough for the on-going PFI scheme for the upgrade and maintenance of the borough's street lights.

d) Lewisham Gateway Development

A loan of £2m was advanced to the consortium which is undertaking the Lewisham Gateway development.

e) Other Long Term Debtors

Other long term debtors includes a social investment business loan to Wide Horizons for £0.7m in 2017/18. This totals £1.3m shared between Lewisham and Greenwich.

Notes to the Core Financial Statements

b) Current Debtors

These are short term debts for goods and services which are expected to be repayable within a year.

	31/03/18 £000	31/03/17 £000
Government and Other Public Bodies:		
HM Revenue & Customs - VAT	4,240	4,562
Central Government bodies	4,720	2,464
Other Local Authorities	962	2,866
NHS bodies	16	94
Other Public bodies	80	241
Council Tax Payers	32,307	28,995
NDR Payers	984	1,187
Council Tax Court Costs	8,290	7,389
Housing Benefit Overpayments	25,776	24,172
Housing Rents (inc PSL, B & B, Hostels, Commercial)	8,576	8,935
Leaseholders Services Charges	6,153	4,272
Parking	270	415
LBL Pension Fund	1,315	176
General Debtors due for Supplies and Services	27,316	29,228
Total Current Debtors	121,005	114,996
Impairment Allowances	(75,464)	(67,510)
Total Net Current Debtors	45,541	47,486

c) Impairment Allowances

	Balance at 31/03/17 £000	Movement in 2017/18 £000	Balance at 31/03/18 £000
Council Tax Payers	(26,918)	(2,941)	(29,859)
Council Tax Court Costs	(6,681)	(820)	(7,501)
NDR Payers	(702)	155	(547)
Housing Benefit Overpayments	(17,115)	(1,799)	(18,914)
Housing Rents (inc PSL, B & B, Hostels, Commercial)	(4,656)	642	(4,014)
Leaseholders Services Charges	(1,392)	(610)	(2,002)
General Debtors due for Supplies and Services	(10,046)	(2,581)	(12,627)
Total Impairment Allowances	(67,510)	(7,954)	(75,464)

The above have been determined individually according to the particular factors for each type of debtor.

Notes to the Core Financial Statements

15. CASH AND CASH EQUIVALENTS

	Balance 31/03/17 £000	Movement in 2017/18 £000	Balance 31/03/18 £000
Cash Equivalents			
Short Term Deposits	0		0
Cash			
Money Market Funds	92,461	8,440	100,901
Call Accounts with Banks	0		0
	92,461	8,440	100,901
Other Cash and Bank Balances			
Main Bank Accounts	0	0	0
Other Cash and Bank Accounts	(413)	3,725	3,312
	(413)	3,725	3,312
Total Cash and Cash Equivalents	92,048	12,165	104,213
Bank Accounts Overdrawn			
Main Bank Accounts	(3,370)	(6,391)	(9,761)
Schools Bank Accounts	(162)	430	268
	(3,532)	(5,961)	(9,493)
Net Cash and Cash Equivalents	88,516	6,204	94,720

a) Short term deposits are made for varying periods of between one day and three months (less than 92 days), depending on the immediate cash requirements, and earn interest at the respective rates.

b) The carrying amounts of cash equivalents, cash and bank overdrafts approximate to their fair values.

c) The schools bank accounts are an integral part of the Council's overall cash management arrangements, and are therefore included under Net Cash and Cash Equivalents. They consist of individual accounts for each school, and an overall treasury account which is used to invest the net balance in conjunction with the Council's other balances. The balances on these accounts were £24.7m (2016/17 £15.2m) and overdrawn £24.4m (2016/17 overdrawn £15.3m) respectively.

Notes to the Core Financial Statements

16. CREDITORS

These are amounts owed to the Government and other public bodies and all unpaid sums for goods and services received as at the end of the year.

	31/03/18 £000	31/03/17 £000
Government and other public bodies:		
HM Revenue & Customs	5,619	5,413
Central Government bodies	13,670	4,403
Other Local Authorities	7,118	8,422
NHS bodies	3,722	13,527
Other Public bodies	403	1,571
	30,532	33,336
Short Term Compensated Absences	7,056	7,748
General Creditors (amounts owed for supplies and services)	40,605	35,369
Total Creditors	78,193	76,453

17. REVENUE RECEIPTS IN ADVANCE

	31/03/18 £000	31/03/17 £000
Capital Contributions Unapplied	40,423	32,805
PFI Schemes	23,142	22,486
Council Tax	7,929	7,558
NDR	3,470	2,295
Rents in Advance	5,165	4,161
Revenue Grants and Contributions	5,681	2,264
Other Receipts in Advance	4,683	5,220
Total Receipts in Advance	90,493	76,789

18. PROVISIONS

These are amounts which are set aside to meet liabilities that are likely or certain to arise from events which have taken place, but where it is not possible to determine precisely when the event will take place.

	Balance 31/03/17 £000	2017/18 Transfers		Balance 31/03/18 £000
		Out £000	In £000	
Current (less than 1 year)				
Insurance Provision	2,703	(1,790)	1,619	2,532
Other Provisions	1,055	(5,347)	5,138	846
	3,758	(7,137)	6,757	3,378
Non Current (Over 1 year)				
Insurance Provision	3,726	0	702	4,428
Other Provisions	1,117	(517)	365	965
	4,843	(517)	1,067	5,393
Total - Provisions	8,601	(7,654)	7,824	8,771

Notes to the Core Financial Statements

Insurance Provisions

The Council's insurance programme comprises a mix of external insurance, largely for cover at catastrophe level or where required by contract or lease arrangements, and self-insurance. Dedicated Insurance Provisions and Reserves are maintained to provide 'self-insurance' to meet either uninsured losses or losses that fall below the external insurance excess. The appropriate levels are assessed annually by the Council's insurance actuaries.

19. USABLE CAPITAL RECEIPTS

Capital Receipts are mainly sums received from the sale of non-current assets. Housing capital receipts are subject to pooling arrangements whereby under certain conditions a portion is payable to central government. Non housing capital receipts are wholly usable to finance new capital expenditure. The balance on this account is available to fund future capital expenditure.

	2017/18 £000	2016/17 £000
Balance brought forward at start of year	55,495	57,231
Amounts Received	13,596	19,364
Poolable to Central Government	(1,927)	(1,947)
Amounts applied to finance new capital investment	(18,814)	(19,153)
Total increase/(decrease) in capital receipts in year	(7,145)	(1,736)
Balance carried forward at end of year	48,350	55,495

20. PENSION RESERVE

The Pensions Reserve reflects the timing differences which arise from the accounting treatment for post-employment benefits and for funding benefits in accordance with statutory provisions. The Council accounts for post-employment benefits in the CIES as the benefits are earned by employees accruing years of service, updating the liabilities recognised to reflect inflation, changing assumptions and investment returns on any resources set aside to meet the costs. However, statutory arrangements require benefits earned to be financed as the Council makes employer's contributions to pension funds or eventually pays any pensions for which it is directly responsible. The debit balance on the Pensions Reserve therefore shows a substantial shortfall between the benefits earned by past and current employees and the resources the Council has set aside to meet them. The statutory arrangements ensure that funding will have been set aside by the Council by the time the benefits are due to be paid.

	2017/18 £000	2016/17 £000
Balance brought forward at start of year	(644,264)	(601,806)
Actuarial gains or losses on pensions assets and liabilities	38,950	(19,316)
Reversal of items relating to retirement benefits debited or credited to the Surplus or Deficit on the Provision of Services in the CIES	(67,129)	(57,622)
Employer's pensions contributions and direct payments to pensioners payable in the year	32,708	34,480
Balance carried forward at end of year	(639,735)	(644,264)

Notes to the Core Financial Statements

21. REVALUATION RESERVE

The Revaluation Reserve records the accumulated gains since 1st April 2007 on non-current assets held by the Council arising from increases in value (to the extent that these gains have not been consumed by subsequent downward movements in value). The Reserve is also debited with the part of the depreciation that has been incurred because the asset has been revalued. On disposal of an asset, its Revaluation Reserve balance is written out to the Capital Adjustment Account. The overall balance on the Reserve thus represents the amount by which the value of non-current assets carried in the Balance Sheet is greater because they are carried at revalued amounts rather than depreciated historical cost.

	2017/18 £000	2016/17 £000
Balance brought forward at start of year	890,273	808,913
Revaluation of Assets	158,273	105,109
Impairment Losses	(3,302)	(3,252)
Surplus or deficit on revaluation of non-current assets not posted to the Surplus or Deficit on the Provision of Services	154,971	101,857
Difference between fair value and historic cost depreciation	(17,086)	(15,946)
Accumulated gains on assets sold or scrapped	(2,676)	(4,551)
Amount written off to the Capital Adjustment Account	(19,762)	(20,497)
Balance carried forward at end of year	1,025,482	890,273

Notes to the Core Financial Statements

22. CAPITAL ADJUSTMENT ACCOUNT

This reflects the timing differences arising from the accounting treatment for the use of non-current assets and for financing the acquisition, construction or enhancement of those assets under statutory provisions. The Account is debited with the cost of acquisition, construction or enhancement as depreciation, impairment losses and amortisations are charged to the CIES (with reconciling entries from the Revaluation Reserve to convert fair value figures to a historical cost basis). It is credited with the amounts set aside by the Council as finance for the costs of acquisition, construction and enhancement.

	2017/18 £000	2016/17 £000
Balance brought forward at start of year	895,587	899,650
<u>Reversal of capital expenditure items debited or credited to the CIES</u>		
Charges for depreciation and impairment of non-current assets	98,431	(61,954)
Revenue expenditure funded from capital under statute	(10,925)	(5,799)
Non-current assets written off on disposal - gain/loss to the CIES	(3,029)	(5,217)
	84,477	(72,970)
Adjusting amounts written out of the Revaluation Reserve	17,086	15,960
Net amount written out of the cost of non-current assets consumed in the year	101,563	(57,010)
<u>Capital Financing applied in the year:</u>		
Use of Capital Receipts to finance new capital expenditure	18,814	19,153
Use of Major Repairs Reserve to finance new capital expenditure	485	844
Capital grants and contributions credited to the CIES	16,423	15,929
Statutory Provision for the financing of capital investment	5,534	6,089
Repayment of Principal on PFI schemes	7,708	7,067
Capital expenditure charged to General Fund and HRA	6,582	3,865
	55,546	52,947
Balance carried forward at end of year	1,052,696	895,587

Notes to the Core Financial Statements

23. EXPENDITURE AND INCOME ANALYSED BY NATURE

	2017/18 £000	2016/17 £000
Employee expenses - LBL	266,309	273,772
Employee expenses - Schools not part of LBL Payroll	58,363	58,558
Other Expenditure	698,834	660,534
Depreciation, amortisation and impairment	(98,431)	61,954
Interest payments	34,169	34,995
Loan Restructuring	23,314	0
Precepts and levies	1,638	1,632
Payments to Housing Capital Receipts Pool	1,927	1,947
Gain or loss on disposal of non-current assets	0	0
Net interest on the net defined benefit liability	17,042	21,152
Total Expenditure	1,003,165	1,114,544
Government grants and contributions	(648,754)	(662,253)
Fees, Charges and Other service income	(236,465)	(220,114)
Interest and Investment income	(3,050)	(3,002)
Income from council tax, non-domestic rates, district rate income	(189,915)	(176,610)
Recognised Capital Grants and Contributions	(18,474)	(15,577)
Gain or loss on disposal of non-current assets	(8,182)	(9,823)
Other Income	0	0
Total Income	(1,104,840)	(1,087,379)
(Surplus) or Deficit on the Provision of Services	(101,675)	27,165

24. AGENCY SERVICES AND POOLED BUDGETS

The Council did not carry out any agency services, construction work or any other work for any other Local Authorities, public bodies or entities in 2017/18 (nor 2016/17).

In 2017/18 the Council operated a pooled budget as defined by the terms of a Section 75 Agreement (National Health Service Act 2006). The pooled budget is hosted by Lewisham Borough Council ("LBL") on behalf of LBL and NHS Lewisham CCG being the two partners to the agreement.

Pooled Budget - Better Care Fund

	2017/18 £000	2016/17 £000
Funding provided to the pooled budget:		
Lewisham Borough Council	(9,683)	(1,781)
NHS Lewisham CCG	(20,425)	(20,165)
	(30,108)	(21,946)
Expenditure met from the pooled budget:		
Lewisham Borough Council	18,194	11,206
NHS Lewisham CCG	11,914	10,740
	30,108	21,946
Net surplus arising in year	0	0

Note:

- (i) The LBL share of any in-year net surplus would be 9.6%. This was nil in 2017/18 (and 2016/17) due to there not being a surplus.

Notes to the Core Financial Statements

25. INVESTMENT IN COMPANIES**a) Companies of which the Council is the sole owner.**

The Council is sole owner of two companies:

- i) Lewisham Homes Limited
- ii) Catford Regeneration Partnership Limited

Further detail on these companies is given in the Group Accounts section of these statements.

b) Companies of which the Council is a joint owner or shareholder.**i) Lewisham Schools for the Future LEP and SPV's**

The Council has a stake of 10% in Lewisham Schools for the Future LEP Limited which is the Local Education Partnership company also comprising Costain Engineering & Construction Limited, Babcock Project Investments Limited and Building Schools for the Future Limited as well. It was established under the Council's Building Schools for the Future (BSF) programme to rebuild and refurbish the secondary schools within the Borough.

The Council also has a 10% stake in four Special Purpose Vehicles which were set up in relation to the schools which were built within this BSF Programme. Amounts paid to these companies in 2017/18 are shown in brackets and are included in the Resources & Regeneration line of the CIES.

The companies concerned are Lewisham SPV Ltd (£9.0m), Lewisham SPV2 Ltd (£3.0m), Lewisham SPV3 Ltd (£4.4m) and Lewisham SPV4 Ltd (£8.3m). The Head of Financial Services is the Council's Director on all of these companies' boards. The corporate structure is standard to BSF schemes.

ii) South-East London Combined Heat and Power Ltd (SELCHP)

The Council has a minority share of less than 1% in South-East London Combined Heat and Power Ltd (SELCHP) which is a joint venture with the London Borough of Greenwich for the provision of waste disposal and waste to energy services. Payments of £4.6m were made in 2017/18 to the company (£5.4m in 2016/17) and are included in the Customer Services line of the CIES.

iii) Newable Ltd

The Council has a minority share in Newable Ltd (formerly Greater London Enterprise Ltd) which is a company limited by guarantee and provides property management & consultancy services. No payments were made by the Council in 2017/18.

26. MEMBERS' ALLOWANCES

The Council paid the following amounts to elected members of the Council during the year.

	2017/18 £000	2016/17 £000
Allowances (incl. NI)	939	932
Other Expenses	86	70
Total Expenditure in Year	1,025	1,002

Notes to the Core Financial Statements

27. OFFICERS' REMUNERATION**a) The number of Employees whose Remuneration was £50,000 or more:-**

Remuneration Band	Non-Schools		Schools		Totals	
	2017/18	2016/17	2017/18	2016/17	2017/18	2016/17
£50,000 to £54,999	68	51	162	178	230	229
£55,000 to £59,999	26	24	86	89	112	113
£60,000 to £64,999	18	16	55	54	73	70
£65,000 to £69,999	14	17	26	23	40	40
£70,000 to £74,999	10	8	28	26	38	34
£75,000 to £79,999	3	2	18	19	21	21
£80,000 to £84,999	2	2	8	9	10	11
£85,000 to £89,999	2	0	8	9	10	9
£90,000 to £94,999	0	1	7	5	7	6
£95,000 to £99,999	8	7	2	2	10	9
£100,000 to £104,999	4	1	2	1	6	2
£105,000 to £109,999	1	1	3	4	4	5
£110,000 to £114,999	0	1	0	0	0	1
£115,000 to £119,999	2	2	1	1	3	3
£120,000 to £124,999	0	0	2	0	2	0
£125,000 to £129,999	0	0	0	0	0	0
£130,000 to £134,999	0	0	0	0	0	0
£135,000 to £139,999	0	1	0	0	0	1
£140,000 to £144,999	3	3	0	0	3	3
£150,000 to £154,999	0	1	0	0	0	1
£155,000 to £159,999	1	0	0	0	1	0
Total	162	138	408	420	570	558

Note - These figures include the senior employees disclosed separately in note b) below.

Notes to the Core Financial Statements

b) Disclosure of Senior Employees' Remuneration

The definition of a "Senior Employee" is set out in Regulation 7 of the Accounts and Audit (England) Regulations 2011 (SI 2011/817). In summary, they are either a statutory chief officer, or have the power to direct or control the major activities of the council or report direct to the head of the council's paid service. They are not the same group of senior staff whose salaries are published on the Council's website.

Financial Year 2017/18**Senior Employees**

Executive Director for Children and Young People	143,961	32,391	176,352
Executive Director for Resources and Regeneration - Ms J Senior (a)	155,083	34,894	189,977
Executive Director for Community Services	143,961	32,391	176,352
Executive Director for Customer Services	143,961	32,391	176,352
Chief Executive (Part time) (b)	116,552	0	116,552
Director of Children's Social Care and Health	117,060	26,339	143,399
Director of Public Health	123,240	16,683	139,923
Head of Law and Monitoring Officer (Part time)	65,819	14,809	80,628

Totals

Salary (inc fees and allowances)	Employer's Pension Contributions	Total (inc. Pension Contributions)
£	£	£
1,009,637	189,898	1,199,535

(a) Salary includes an allowance for acting as Chief Executive following the resignation of the previous postholder

(b) The Chief Executive resigned effective from 31 January 2018. A new postholder will commence in May 2018.

Financial Year 2016/17**Senior Employees**

Executive Director for Children and Young People	139,871	31,471	171,342
Executive Director for Resources and Regeneration	142,536	32,071	174,607
Executive Director for Community Services	143,472	32,281	175,753
Executive Director for Customer Services	142,536	32,071	174,607
Chief Executive (Part time)	116,586	0	116,586
Director of Children's Social Care and Health	115,974	26,094	142,068
Director of Public Health - Dr D Ruta (a)	153,874	18,200	172,074
Head of Law and Monitoring Officer (Part time)	66,067	14,865	80,932

Totals

Salary (inc fees and allowances)	Employer's Pension Contributions	Total (inc. Pension Contributions)
£	£	£
1,020,916	187,053	1,207,969

(a) Dr Ruta's total remuneration includes £26,414 in pay arrears backdated from 01/04/13 to 28/02/17

Note – No payments in respect of bonuses, expenses or compensation for loss of office were made to any of these employees in 2017/18 (or 2016/17).

Notes to the Core Financial Statements

c) Termination Benefits - Exit Packages Agreed in Year

The number and cost of exit packages granted to employees in the year are shown below. These costs include redundancy payments to employees which were charged to the CIES. They also include payments to the Pension Fund in respect of the extra pension costs of employees who were granted early access to their pensions.

Cost Band (inc Pension Fund Contributions)

	Total Number of Exit Packages		Total Cost of Exit Packages	
	2017/18 No.	2016/17 No.	2017/18 £000	2016/17 £000
£0 to £20,000	78	70	609	435
£20,001 to £40,000	14	26	380	782
£40,001 to £60,000	3	14	135	670
£60,001 to £80,000	2	3	130	200
£80,001 to £100,000	2	3	180	258
Total	99	116	1,434	2,345

28. EXTERNAL AUDIT COSTS

	2017/18 £000	2016/17 £000
External Audit Services	193	193
Certification of Grant Claims and Returns	41	41
Other services provided by the appointed auditor	11	10
	245	244

The Council's External Auditors are Grant Thornton.

Notes to the Core Financial Statements

29. DEDICATED SCHOOLS' GRANT

The Council's expenditure on schools is funded primarily by the Dedicated Schools' Grant (DSG) provided by the DfE. The DSG is ring-fenced and can only be used to meet expenditure as defined in the School Finance (England) Regulations 2011. The Schools Budget includes elements for a range of educational services provided on a Council wide basis and for the Individual Schools Budget (ISB), which is divided into a budget share for each maintained school.

	2017/18			Restated 2016/17		
	Central Expenditure £000	Individual Schools Budget (ISB) £000	Total £000	Central Expenditure £000	Individual Schools Budget (ISB) £000	Total £000
Final DSG before academy recoupment			289,626			282,643
Academy figure recouped			(29,441)			(26,804)
Total DSG after academy recoupment			260,185			255,839
Brought forward from previous year			0			0
Carry forward to next year agreed in advance			0			0
Agreed initial budgeted distribution	71,632	188,553	260,185	64,406	191,433	255,839
In year adjustments	(801)		(801)	1,246	0	1,246
Final Budget Distribution	70,831	188,553	259,384	65,652	191,433	257,085
Actual Central Expenditure	70,831		70,831	65,652		65,652
Actual ISB deployed to schools		188,553	188,553		191,433	191,433
Carry Forward	0	0	0	0	0	0

30. GRANT INCOME

The following grants were credited to services during the year:

	2017/18 £000	2016/17 £000
Dedicated Schools Grant	(259,656)	(257,242)
Housing Benefit Grant	(217,325)	(225,422)
Housing Subsidy/ Decent Homes Backlog Grant	(10,353)	(10,353)
BSF/ Grouped Schools PFI Unitary Charge Grant	(26,290)	(26,346)
Public Health Grant	(24,967)	(25,598)
Pupil Premium Grant	(15,125)	(15,877)
Other Grants	(36,537)	(26,231)
Total	(590,253)	(587,069)

Notes to the Core Financial Statements

31. RELATED PARTY TRANSACTIONS

The Council is required to disclose material transactions with related parties, which are bodies or individuals that have the potential to control or influence the Council or to be controlled by the Council.

(a) Central Government and Other Local Authorities

Central government exerts significant influence over the Council through legislation and grant funding. The general government grants received are shown in Note 30 to the Core Financial Statements. The precept to the Greater London Authority is shown in the notes of the Collection Fund in Section 5 of these Accounts. There were numerous other transactions between the Council and other Local Authorities.

(b) Subsidiaries, Associated Companies and Joint Ventures

The companies that are related to the Council are detailed in Note 25 to the Core Financial Statements.

(c) Elected Members (Councillors) and Chief Officers

Councillors have direct control over the Council's financial and operating policies, and their total cost is shown in Note 26. They are required to declare all related party transactions which they have with any organisation in which they have a controlling interest. This information is recorded on the Council's Register of Members and Chief Officers' Declarations of Interests and is open to public inspection at the Civic Suite at Lewisham Civic Suite during office hours. The information is also published on the Council's website. The Council is compliant with the Localism Act 2012. The material instances (over £100,000) where a Councillor has declared a related party transaction are as follows:

- **Councillor Alan Till is a board member of the Marsha Phoenix Memorial Trust (£0.201m)**
- **Councillor Brenda Dacres is a board member of the Albany Trust (£0.868m)**

(d) Lewisham Pension Fund

The Pension Fund Accounts are included in Section 7 of this document.

Notes to the Core Financial Statements

32. CAPITAL EXPENDITURE AND CAPITAL FINANCING

The capital expenditure incurred in the year (excluding the value of assets acquired under finance leases and PFI contracts) and the resources used to finance it are shown below. Any expenditure which is not financed in the year will add to the Capital Financing Requirement (CFR), which measures the capital expenditure incurred historically by the Council that has yet to be financed. The Council is required to set aside an amount each year (the Minimum Revenue Provision - MRP) to repay debt, this reduces the CFR.

	2017/18 £000	2016/17 £000
Opening Capital Financing Requirement	242,638	241,725
Capital Investment		
Property, Plant and Equipment	46,297	40,963
Revenue Expenditure Funded from Capital under Statute	10,925	5,799
	57,222	46,762
Resources Used for Financing		
Capital Receipts	(18,814)	(19,153)
Government Grants and Other Contributions	(18,479)	(15,898)
Sums set aside from Revenue:	(5,012)	(4,709)
	(42,305)	(39,760)
Increase in the underlying need to borrowing	14,917	7,002
Debt Redeemed - Minimum Revenue Provision	(5,534)	(6,089)
Increase/ (decrease) in Capital Financing Requirement	9,383	913
Closing Capital Financing Requirement	252,021	242,638

33. LEASES**a) Council as a Lessee**i) Finance Leases

The council does not have any assets held under Finance Leases.

ii) Operating Leases

The Council has operating leases in the areas of Council Dwellings, School Plant and Equipment and Refuse Vehicles. The expenditure charged to services in the CIES during the year in relation to these leases was £1.6m (£1.5m in 2016/17). The future minimum lease payments due under non-cancellable leases in futures are:

	31/03/18 £000	31/03/17 £000
Not later than one year	1,427	1,258
Later than one year and not later than five years	3,017	2,896
Later than five years	18,824	14,794
	23,268	18,948

Notes to the Core Financial Statements

b) Council as a Lessor

i) Finance Leases

The council does not have any assets held under Finance Leases.

ii) Operating Leases

The Council leases out a number of commercial properties for Investment purposes. The future minimum lease payments receivable under non-cancellable leases in future years are:

	31/03/18 £000	31/03/17 £000
Not later than one year	1,842	2,091
Later than one year and not later than five years	3,206	4,614
Later than five years	1,258	2,258
	6,306	8,963

34. PRIVATE FINANCE INITIATIVES (PFI) CONTRACTS

a) Summary of PFI Schemes

PFI Scheme	Brockley HRA	Downham Lifestyles	Grouped Schools	BSF 1	BSF 2	BSF 3	BSF 4	Street Lighting
Start of Contract	2007	2007	2007	2009	2011	2012	2012	2011
End of Contract	2027	2039	2036	2035	2037	2037	2038	2036
Total Estimated Cost	£287m	£77m	£227m	£241m	£86m	£118m	£224m	£95m
Total PFI Credits	£207m	£30m		£674m				£54m
Net PFI Cost	£80m	£47m		£222m				£41m

b) Payments made under PFI contracts

	Brockley HRA	Downham Lifestyles	Grouped Schools	BSF 1	BSF 2	BSF 3	BSF 4	Street Lighting	Total
	£000	£000	£000	£000	£000	£000	£000	£000	£000
2017/18									
Service Charges	8,156	456	3,402	3,204	860	933	1,702	779	19,492
Interest	4,369	1,604	3,313	4,178	1,788	2,660	5,232	2,392	25,536
Liability Repayment	2,662	231	737	1,392	348	698	1,101	538	7,707
Unitary Charge	15,187	2,291	7,452	8,774	2,996	4,291	8,035	3,709	52,735
2016/17									
Service Charges	7,798	437	3,182	2,822	769	857	1,434	897	18,196
Interest	4,563	1,606	3,393	4,342	1,827	2,693	5,307	2,235	25,966
Liability Repayment	2,460	306	735	1,470	361	671	1,171	532	7,706
Unitary Charge	14,821	2,349	7,310	8,634	2,957	4,221	7,912	3,664	51,868

c) Movement in PFI Assets in year

The assets which are used to provide the services under these PFI contracts are recognised within the Council's Balance Sheet. The movements in value over the year are detailed in the following table.

Notes to the Core Financial Statements

	2017/18		2016/17	
	£000	£000	£000	£000
Gross Book Value b/fwd		336,938		324,467
Additions		355		3,076
Revaluations (recognised in Revaluation Reserve)	48,076		5,419	
Revaluations (recognised in Surplus/ Deficit on the Provision of Services)	22,945	71,021	5,133	10,552
Impairments (recognised in Revaluation Reserve)	0		0	
Impairments (recognised in Surplus/ Deficit on the Provision of Services)	(355)	(355)	0	0
Disposals		(372)		(1,157)
Transfers		0		0
Assets reclassified (to)/ from Held for Sale		0		0
Gross Book Value c/fwd		407,587		336,938
Depreciation b/fwd		(2,675)		(1,632)
Depreciation for year		(7,215)		(6,981)
<u>Depreciation written back on:</u>				
Transfers		0		0
Revaluations (recognised in Revaluation Reserve)	4,215		3,462	
Revaluations (recognised in Surplus/ Deficit on the Provision of Services)	1,372	5,587	2,474	5,936
Impairments (recognised in Revaluation Reserve)	0		0	
Impairments (recognised in Surplus/ Deficit on the Provision of Services)	0		0	0
Assets sold		0		2
Depreciation c/fwd		(4,303)		(2,675)
Net Book Value at End of Year		403,283		334,262

d) PFI Liabilities

The unitary payments made to the contractors have been calculated to pay them the fair value of the services they provide, the capital expenditure they have incurred and interest they will pay whilst the capital expenditure remains to be reimbursed. The Council's total outstanding liability to the contractors is shown in the following table.

	Current Liabilities (Due within 1 Year)		Deferred (Future) Liabilities	
	2017/18 £000	2016/17 £000	2017/18 £000	2016/17 £000
Balance outstanding at start of year	7,580	7,706	236,196	240,061
Balance outstanding at end of year	7,945	7,580	228,124	236,196

Notes to the Core Financial Statements

e) Payments due under PFI contracts in future years

The Council makes an agreed payment each year which is linked to inflation and can be reduced if the contractor fails to meet availability and performance standards. The following table shows the estimated payments due to be paid (as part of a unitary charge) for each PFI. The price base is in nominal terms assuming a 1.9% RPI increase per annum compounded until the end of the contract. The amounts are broken down into the different elements of the payments reflecting how they will be accounted for.

Note: Amounts shown for Brockley HRA PFI relate only to the unitary charge for tenanted properties.

	In 2018/19	2 to 5 years	6 to 10 years	11 to 15 years	16 to 20 years	21 to 25 years	Total
	£000s	£000s	£000s	£000s	£000s	£000s	£000s
Brockley HRA							
Service charges	7,952	36,580	40,006				84,538
Interest	4,142	13,072	8,091				25,305
Repayment of liability	2,954	12,504	20,303				35,761
Planned lifecycle replacement	428	2,454	2,369				5,250
Downham Lifestyles							
Service charges	235	999	1,396	1,580	1,787	385	6,382
Interest	1,563	6,373	8,078	7,628	6,674	1,115	31,430
Repayment of liability	116	639	1,404	2,197	3,972	1,140	9,467
Planned lifecycle replacement	246	1,049	1,479	1,687	1,909	411	6,780
Grouped Schools							
Service charges	2,722	11,681	16,566	19,064	13,335		63,368
Interest	3,231	12,049	12,826	9,383	2,773		40,261
Repayment of liability	769	3,501	6,737	12,162	11,175		34,345
Planned lifecycle replacement	853	4,157	5,515	4,032	2,410		16,967
BSF 1							
Service charges	2,582	11,128	15,895	18,435	8,173		56,213
Interest	3,959	14,751	14,656	8,981	441		42,789
Repayment of liability	1,212	6,255	11,013	17,935	7,921		44,336
Planned lifecycle replacement	1,143	4,549	6,977	6,542	2,522		21,733
BSF 2							
Service charges	772	3,285	4,590	5,193	5,156		18,995
Interest	1,759	6,563	7,116	5,301	2,134		22,874
Repayment of liability	393	1,582	2,902	4,834	6,813		16,525
Planned lifecycle replacement	102	967	1,602	1,772	1,855		6,299
BSF 3							
Service charges	958	4,155	6,628	8,315	8,452		28,509
Interest	2,605	9,907	10,539	7,738	4,058		34,846
Repayment of liability	682	3,347	5,001	6,742	9,172		24,945
Planned lifecycle replacement	99	464	1,382	2,263	2,331		6,539
BSF 4							
Service charges	1,621	7,550	11,286	14,000	16,934		51,391
Interest	5,160	19,717	21,661	16,552	8,813		71,903
Repayment of liability	1,232	5,035	8,807	12,540	19,040		46,655
Planned lifecycle replacement	111	1,055	2,044	3,325	4,596		11,131
Streetlighting							
Service charges	798	3,397	4,746	5,370	4,000		18,311
Interest	2,359	9,018	9,919	7,524	2,994		31,814
Repayment of liability	585	2,895	5,260	7,944	7,450		24,135
Planned lifecycle replacement	0	0	0	0	0		0
Totals	53,344	220,679	276,795	219,041	166,888	3,050	939,796

Notes to the Core Financial Statements

35. LONG TERM CONTRACTS

The table below shows the significant long term contracts that the Council has entered into:

Contract Name	Contractor	Start/ End Date	Total Contract Value
School Meals Catering Contract	Chartwells	May-15/ Apr-20	£40m
Parks and Open Spaces	Glendale Grounds Management	Mar-10/ Feb-20	£26.1m
Leisure Centre Management	Fusion Lifestyles	Oct-12/ Oct-27	£12.7m
Parking Contract	NSL	Aug-13/ Jul-19	£10.8m
Highway Maintenance Contract	FM Conway	Apr-14/ Mar-19	£7.5m
Data Centre Provision	Logicalis	Apr-11/ Mar-21	£4.0m

36. DEFINED CONTRIBUTION PENSION SCHEMES

The Teachers and the National Health Service Pension Schemes are technically defined benefit schemes. However, their assets and liabilities cannot reliably be identified at individual employer level and therefore for the purposes of the Council's accounts they are accounted for as defined contribution schemes.

Teachers employed by the Council are members of the Teachers' Pension Scheme, which is run by the Department for Education (DfE). The scheme provides benefits upon retirement with both the Council and the employee making contributions to the scheme. The scheme is "unfunded" and the DfE use a notional fund to set a national employers contribution rate based on a percentage of members' pensionable pay – in 2016/17 this rate was 16.48% (14.1% for the first part of 2015/16 then 16.48%). In 2016/17, the Council paid £14.9m to the DfE in respect of teachers' pension costs (£13.9m in 2015/16).

Public Health staff employed by the Council are members of the NHS Pension Scheme, which is run by the Department of Health (DoH). The scheme provides benefits upon retirement with both the Council and the employee making contributions to the scheme. The scheme is "unfunded" and the DoH use a notional fund to set a national employers contribution rate based on a percentage of members pensionable pay – this rate was 14.3% for 2016/17 (14.0% in 2015/16). In 2016/17 the Council paid £0.087m to the DoH in respect of employees' pension costs (£0.115m in 2015/16).

37. DEFINED BENEFIT PENSION SCHEMES**a) Participation in Pension Schemes**

The Council offers retirement benefits as part of the terms and conditions of staff employment. Although these benefits will not actually be payable until employees retire, the Council is committed to making these payments, and they are required to be disclosed at the time that employees earn their future entitlement. The Council makes contributions on behalf of its employees to the Local Government Pension Scheme (LGPS) and the London Pensions Fund Authority (LPFA). These are defined benefit final salary schemes, meaning that both the Council and the employees pay contributions into a fund, calculated at a level which is intended to balance the pensions liabilities with investment assets.

Notes to the Core Financial Statements

b) Assessment of the Assets and Liabilities of the Pension Schemes

These are assessed on an actuarial basis using the projected unit method and an estimate of the pensions that will be payable in future years dependent on assumptions about mortality rates, salary levels etc. They have been prepared by independent firms of actuaries (the LGPS by Hymans Robertson and the LPFA by Barnett Waddingham), and are based on IAS19 assumptions and calculations for the year and the latest triennial valuations as at 31st March 2016. It should be noted the Council has guaranteed any pension liability that may arise for its wholly owned subsidiary, Lewisham Homes and as such the figures shown in the balance sheet incorporate the figures for Lewisham Homes.

c) Transactions relating to Retirement Benefits

In accordance with IAS19, the Council recognises the cost of retirement benefits relating to these schemes in the Net Cost of Services when they are earned by employees, rather than when the benefits are eventually paid as pensions. However the required charge to the Council Tax is based on the cash paid in the year so the real cost of retirement benefits is reversed out of the General Fund via the MiRS. The following transactions were made during the year in the CIES and the General Fund Balance via the MiRS:

Comprehensive Income and Expenditure Statement**Cost of Service**

Current Service Cost

49,734

35,679

Past Service Cost (inc.settlements and curtailments)

456

791

50,190

36,470

Financing and Investment Income and ExpenditureNet Interest on the Net Defined Benefit Liability

Interest Income on Scheme Assets

(32,615)

(36,207)

Interest Cost on Defined Benefit Obligation (Liabilities)

49,554

57,359

16,939

21,152

Total Post Employment Benefits Charged to the Surplus or Deficit on the Provision of Services

67,129

57,622

Remeasurements of the Net Defined Benefit Liability

Return on Assets excluding amounts included in Net Interest

(816)

(204,685)

Actuarial Losses from changes in Demographic Assumptions

0

(18,395)

Actuarial Losses from changes in Financial Assumptions

(35,883)

291,213

Other Gains and Losses

(2,251)

(48,817)

Total Remeasurements recognised in CIES

(38,950)

19,316

Total Post Employment Benefits Charged to the CIES

28,179

76,938

Movement in Reserves Statement

Reversal of Net Charges made to the the Surplus or Deficit on the Provision of Services

(67,129)

(57,622)

Employers' Contributions Payable to the Scheme

816

34,480

Return on Assets excluding amounts included in Net Interest

38,134

204,685

Actuarial Gains and Losses

38,134

(224,001)

Net Movement in Pensions Reserve

(28,179)

(42,458)

Notes to the Core Financial Statements

d) Pensions Assets and Liabilities Recognised in the Balance Sheet

	31/03/18 £000	31/03/17 £000
Fair Value of Plan Assets	1,293,992	1,273,563
Present Value of Defined Benefit Liability (Obligation)	(1,933,727)	(1,843,419)
	(639,735)	(569,856)
Present Value of Unfunded Liabilities	0	(74,408)
Pensions Reserve - Year End Balance	(639,735)	(644,264)

e) Reconciliation of the Movements in the Fair Value of Scheme Assets

	31/03/18 £000	31/03/17 £000
Opening Fair Value of Scheme Assets	1,273,563	1,045,251
Interest Income on Scheme Assets	32,615	36,207
Administration	(103)	(89)
<u>Remeasurement Gains / Losses</u>		
Return on Assets excluding amounts included in Net Interest	816	204,685
Employer Contributions	28,109	29,519
Contributions in respect of Unfunded Benefits	4,599	4,961
Contributions from Scheme Participants	8,409	8,409
Benefits Paid	(49,417)	(50,582)
Unfunded Benefits Paid	(4,599)	(4,961)
Other Gains and Losses	0	163
Closing Fair Value of Scheme Assets	1,293,992	1,273,563

Notes to the Core Financial Statements

f) Reconciliation of the Movements in the Present Value of Scheme Liabilities

	31/03/18 £000	31/03/17 £000
Opening Present Value of Scheme Liabilities (Obligations)	(1,917,827)	(1,647,057)
Current Service Cost	(49,631)	(35,679)
Interest Cost on Defined Benefit Obligation (Liabilities)	(49,554)	(57,270)
Contributions from Scheme Participants	(8,409)	(8,409)
<u>Remeasurement Gains / Losses</u>		
Benefits Paid	49,417	50,582
Unfunded Benefits Paid	4,599	4,961
Actuarial Losses from changes in Demographic Assumptions	0	18,395
Actuarial Losses from changes in Financial Assumptions	35,883	(291,213)
Other Gains and Losses	2,251	48,654
Past Service Costs / Curtailments / Settlements	(456)	(791)
Closing Present Value of Scheme Liabilities (Obligations)	(1,933,727)	(1,917,827)

g) Pension Scheme Assets

	31/03/18			31/03/17		
	Active Market £000	Not in Active Markets £000	Total £000	Active Market £000	Not in Active Markets £000	Total £000
LGPS (LBL and LH)						
Equities	0	0	0	0	10,367	10,367
Debt Securities	115,056	0	115,056	110,095	0	110,095
Real Estate	0	96,429	96,429	0	113,020	113,020
Investment Funds / Unit Trusts	802,824	70,846	873,670	873,333	9,640	882,973
Private Equity	0	27,278	27,278	0	29,724	29,724
Cash and Cash Equivalents	0	101,709	101,709	0	48,178	48,178
Total LGPS Assets	917,880	296,262	1,214,142	983,428	210,929	1,194,357

	31/03/18			31/03/17		
	Active Market £000	Not in Active Markets £000	Total £000	Active Market £000	Not in Active Markets £000	Total £000
LPFA						
Equities	39,746	9,080	48,826	39,073	7,860	46,933
LDI Cashflow matching	0	0	0	0	0	0
Target Return Portfolio	9,737	8,158	17,895	9,511	7,225	16,736
Infrastructure	0	3,493	3,493	401	3,770	4,171
Commodities	0	0	0	0	0	0
Properties	0	5,746	5,746	0	4,038	4,038
Cash	3,890	0	3,890	7,328	0	7,328
Total LPFA Assets	53,373	26,477	79,850	56,313	22,893	79,206

Notes to the Core Financial Statements

h) Basis for Estimating Assets and Liabilities

	Local Government Pension Scheme		LPFA	
	2017/18	2016/17	2017/18	2016/17
Rate of Inflation – CPI	2.4%	2.4%	2.4%	2.4%
Salary Increase Rate	3.1%	3.1%	3.9%	3.9%
Pensions Increases	2.4%	2.4%	2.4%	2.4%
Rate for discounting scheme liabilities	2.7%	2.6%	2.5%	2.2%
Mortality assumptions				
Longevity at 65 for current pensioners - Men	22.2yrs	22.2yrs	21.0yrs	20.9yrs
Longevity at 65 for current pensioners - Women	24.6yrs	24.6yrs	24.0yrs	23.9yrs
Longevity at 65 for future pensioners - Men	24.0yrs	24.0yrs	23.4yrs	23.2yrs
Longevity at 65 for future pensioners - Women	26.5yrs	26.5yrs	26.3yrs	26.2yrs

i) Sensitivity Analysis

Change in Assumption at 31st March 2018	Approximate % Increase in Employer Liability	Approximate Monetary Amount (£000)
LGPS - LB Lewisham		
0.5% Decrease in Real Discount Rate	9%	159,168
1 Year Increase in Member Life Expectancy	4%	70,741
0.5% Increase in the Salary Increase Rate	1%	15,389
0.5% Increase in the Pension Increase Rate	8%	142,278
LGPS - Lewisham Homes		
0.5% Decrease in Real Discount Rate	11%	15,871
1 Year Increase in Member Life Expectancy	4%	5,771
0.5% Increase in the Salary Increase Rate	2%	2,335
0.5% Increase in the Pension Increase Rate	10%	13,323
LPFA		
0.5% Decrease in Real Discount Rate	n/a	238
1 Year Increase in Member Life Expectancy	n/a	242
0.5% Increase in the Salary Increase Rate	n/a	235
0.5% Increase in the Pension Increase Rate	n/a	238

These are based on reasonably possible changes to the assumptions occurring at the end of the year and assumes for each change that the assumption changes while all the other assumptions remain constant.

j) Future Contributions

The objectives of the scheme are to keep the employer's contributions at as constant a rate as possible. The Council has agreed a strategy with the scheme's actuary to achieve an increased funding level over the next 3 years. Funding levels are monitored on an annual basis and the next triennial valuation is due at 31st March 2019. The Council anticipates paying £25.5m in contributions to the scheme in 2018/19.

The scheme will need to assess and take account of the national changes to the Local Government Pension Scheme and other main public service schemes under the Public Pensions Services Act 2013. These took effect from 1st April 2014 and provided for regulations to be made within a common framework to establish new career average earnings provisions to pay pensions and other benefits.

Notes to the Core Financial Statements

38. CONTINGENT LIABILITIES

A contingent liability is an item of expenditure that is likely but not certain and is subject to a further event or decision. At the date of approval of the Accounts the Council had the following contingent liabilities:

As indicated in the Narrative Statement, the total of school deficits / loans stands at just over £1.5m at the end of 2017/18. Because of the complexities and future uncertainties over the arrangements for dealing with school deficits / loans, some or all of this £1.5m may ultimately fall to be met from the Council's General Fund, either in 2018/19 or a later year.

Additionally, there is also potential liability around redundancy costs of circa £0.8m (based on 2017/18 figures). These costs arise from schools implementing management action to reduce staffing in order to balance their budgets. At the moment there is a grey area as to who will bear the ultimate liability and the Council is discussing with DFE and its Legal adviser on this matter.

In addition, the NHS has a current application for charitable status. If accepted this would require a backdated payment of around £8m by the Council and an ongoing annual loss of business rates of £1.5m.

39. CONTINGENT ASSETS

A contingent asset is an item of income that is likely but not certain and is subject to a further event or decision. At the date of approval of the Accounts the Council has no contingent assets.

40. TRUST FUNDS

The Council acts as a trustee for other funds which are not included in the Balance Sheet. Interest on these funds is credited annually at the average rate earned on the Council's revenue balances. The total amount held as at 31st March 2018 was £0.2m (£1.0m as at 31st March 2017).

41. HERITAGE ASSETS

These assets comprise Lewisham Clock Tower and the Civic Regalia. Their values in the accounts are insurance values which are assessed internally and based on current market values. The value of the assets at 31st March 2018 is £0.26m (£0.26m as at 31st March 2017).

The Council has two other "categories" of heritage asset which have not been included on the Balance Sheet. 28 assets, mainly works of art with a total insurance value of approximately £45,000, have individual insurance values which are immaterial. Another 28 assets, mainly paintings and sculptures, have not been included on the balance sheet because the cost of obtaining valuations is not felt to be economic to the benefits of the users of the accounts.

Notes to the Core Financial Statements

42. CASH FLOW STATEMENT - ADJUSTMENT TO SURPLUS OR DEFICIT ON THE PROVISION OF SERVICES FOR NON-CASH MOVEMENTS

	2017/18 £000	2016/17 £000
Depreciation, Impairment and Downward Valuations	(98,431)	57,843
Increase/ (decrease) in creditors	8,056	10,906
(Increase)/ decrease in debtors	(224)	2,702
(Increase)/ decrease in inventories (stock)	29	10
Movement in pension liability	34,421	23,142
Carrying amount of non-current assets and non-current assets held for sale, sold or derecognised	5,705	9,749
Other non-cash items charged to the net surplus or deficit on the provision of services	168	1,146
Total Adjustment to net surplus or deficit on the provision of services for non-cash movements	(50,276)	105,498

43. CASH FLOW STATEMENT - ADJUSTMENT FOR ITEMS INCLUDED IN THE NET SURPLUS OR DEFICIT ON THE PROVISION OF SERVICES THAT ARE INVESTING AND FINANCING ACTIVITIES

	2017/18 £000	2016/17 £000
Proceeds from short-term (not considered to be cash equivalents) and long-term investments (includes investments in associates, joint ventures and subsidiaries)	0	140
Proceeds from the sale of property plant and equipment, investment property and intangible assets	(13,594)	(19,359)
Any other items for which the cash effects are investing or financing cash flows.	(19,591)	(21,912)
Total Adjustment for items included in the net surplus or deficit on the provision of services that are investing and financing activities	(33,185)	(41,131)

44. CASH FLOW STATEMENT - OPERATING ACTIVITIES

	2017/18 £000	2016/17 £000
Interest Received	3,156	3,130
Interest Paid	(33,231)	(35,096)
Net Interest Paid	(30,075)	(31,966)

Notes to the Core Financial Statements

45. CASH FLOW STATEMENT - INVESTING ACTIVITIES

	2017/18 £000	2016/17 £000
Purchase of Property, Plant and Equipment, investment property and intangible assets	(35,240)	(32,518)
Purchase of short and long term investments	(1,178,554)	(495,017)
Other payments for Investing Activities	(9,264)	(6,424)
Proceeds from the sale of property plant and equipment, investment property and intangible assets	13,596	19,364
Proceeds from short-term and long-term investments	1,148,557	445,000
Other Receipts from Investing Activities	22,067	28,804
Net Cash Flows from Investing Activities	(38,838)	(40,791)

46. CASH FLOW STATEMENT - FINANCING ACTIVITIES

	2017/18 £000	2016/17 £000
Cash receipts of short and long term borrowing	28,580	918
Other receipts from financing activities	0	0
Cash payments for the reduction of the outstanding liabilities relating to finance leases and on-balance sheet PFI contracts	(7,707)	(7,706)
Repayment of Short-Term and Long-Term Borrowing	0	(1,263)
Other payments for financing activities	5,955	1,909
Net Cash Flows from Financing Activities	26,828	(6,142)

Housing Revenue Account

SECTION 4 - HOUSING REVENUE ACCOUNT

This account is maintained in accordance with the provisions of the Local Government and Housing Act 1989 to show all income and expenditure relating to the Council's responsibilities as landlord of dwellings and associated property.

COMPREHENSIVE INCOME AND EXPENDITURE ACCOUNT

COMPREHENSIVE INCOME AND EXPENDITURE ACCOUNT	2017/18	2016/17	
	£000	£000	Note
INCOME			
Gross Rent - Dwellings	(70,320)	(71,539)	1
Gross Rent - Other Housing Properties	(3,409)	(3,088)	1
Charges for Services and Facilities	(11,133)	(11,355)	1
Housing Subsidy and Government Grants	(10,353)	(10,353)	2
Contribution towards Expenditure	(5,293)	(1,934)	4
Total Income	(100,508)	(98,269)	
EXPENDITURE			
Supervision and Management - General Expenses	35,583	33,863	5
Supervision and Management - Special Expenses	5,333	4,862	5
Repairs and Maintenance	39,196	31,866	6
Rent, Rates and Other Charges	663	544	8
Rent Rebate Subsidy Shortfall	18	0	3
Contribution to Doubtful Debts Provision	984	409	7
Depreciation - Dwellings	22,059	20,426	10
Depreciation - Other Housing Assets	761	725	10
Impairment of Non Current Assets	73	438	
Debt Management Expenses	24	26	
Total Expenditure	104,694	93,159	
Net Cost of Services included in the Council's Income and Expenditure Account	4,186	(5,110)	
HRA Services share of Corporate and Democratic Core Costs	173	134	
Net Cost of HRA Services	4,359	(4,976)	
HRA share of the Operating Income and Expenditure incl.in the Comprehensive Income and Expenditure Statement			
(Gain) / Loss on Sale of HRA Non Current Assets	(6,338)	(9,673)	
Interest Payable and Similar Charges	6,903	7,580	11
Interest and Investment Income	(638)	(649)	
Net Pension Interest Cost	361	1,611	12
(Surplus) / Deficit for the Year on HRA Services	4,647	(6,107)	

Housing Revenue Account

HOUSING REVENUE ACCOUNT - MOVEMENT IN RESERVES STATEMENT

	2017/18 £000	2016/17 £000
Balance on the HRA at the End of the Previous Year	57,122	42,894
<u>Movement in Year</u>		
Surplus or (Deficit) for the year on the HRA Income and Expenditure Statement	(4,647)	6,107
Adjustments between Accounting Basis and Funding Basis under Statute	16,782	11,398
Net Increase or (Decrease) before Transfers (To) / From Reserves	12,135	17,505
Transfers (To) / From Reserves	951	(3,277)
Increase or (Decrease) in Year on the HRA	13,086	14,228
Balance on the HRA at the End of the Year	70,208	57,122

An analysis of the amounts included within the figures for "Adjustments between Accounting Basis and Funding Basis under Statute" can be found within Note 8 to the Core Financial Statements.

Details of the movement in the Housing Revenue Account Reserves and Balances can be found in Note 15 to the Housing Revenue Account.

Housing Revenue Account

NOTES TO THE HOUSING REVENUE ACCOUNT**1. GROSS RENT OF DWELLINGS**

This is the total rent collectable for the year after allowance is made for empty property. At 31 March 2018, 0.32% of lettable property was empty (0.52% at 31 March 2017). These figures for empty property exclude accommodation for the homeless and dwellings designated for sale, major works and improvements. Average rents were £96.69 in 2017/18 and £97.58 per week in 2016/17.

Service charges have been disaggregated from rents and are now shown under charges for services and facilities.

(a) Housing stock

The Council was responsible for managing 14,158 dwellings as at 31 March 2018 (14,256 as at 31 March 2017).

There have been no stock transfers undertaken in 2017/18.

The stock was made up as follows:

	31/03/18	31/03/17
<u>Stock Numbers at year end</u>		
Houses and Bungalows	2,377	2,424
Flats and Maisonettes	11,781	11,832
Stock at End of Year	14,158	14,256
	2017/18	2016/17
<u>Change in Stock Numbers during the year</u>		
Stock at 1 April	14,256	14,390
Less Sales, Demolitions, etc.	(147)	(155)
Add Re-purchases, Conversions etc.	49	21
Stock at End of Year	14,158	14,256

b) Rent Arrears

	2017/18 £000	2016/17 £000
Rent Arrears due from Current Tenants	3,408	3,129
Rent Arrears due from Former Tenants	1,549	2,178
Total Arrears	4,957	5,307
Total Arrears as % of Gross Rent of Dwellings Due	5.7%	6.1%

The arrears shown in this note exclude water charges, heating charges and all other charges collected as part of tenants' rent. Housing rent represents 91% of the total collectable from tenants.

Housing Revenue Account

c) Rent – Other Housing Property

	2017/18 £000	2016/17 £000
Aerial Sites	205	187
Garages	128	140
Reception Hostels	2,626	2,592
Commercial Property	393	116
Ground Rents	57	53
Total Other Rents and Charges	3,409	3,088

d) Charges for Services and Facilities to Tenants and Leaseholders.

Service charges include caretaking, grounds maintenance, communal lighting, bulk household waste removal and disposal, window cleaning, pest control and the Lewisham Tenants Levy. The average tenants' service charge was £8.27 in 2017/18 (£7.84 in 2016/17).

	2017/18 £000	2016/17 £000
Heating Charges	583	680
Leasehold Service Charges	4,549	4,879
Tenants Service Charges	6,001	5,796
Total Charges for Services and Facilities	11,133	11,355

2. GOVERNMENT HOUSING GRANTS AND SUBSIDY

From 1st April 2012 HRA accounts were prepared under the Government's HRA self-financing regime. Under this system no further housing subsidy transactions are made between government and stock owning Councils. This is in recognition that all rent collected will be retained by the Council and not contributed into the national rent pool.

As the Council has a housing PFI scheme, it will continue to receive the PFI credit until completion of the contract in 2027. This represents an annual payment of £10.353m.

	2017/18 £000	2016/17 £000
Charges for Capital	0	0
PFI Credit	10,353	10,353
Decent Homes Grant	0	0
Total Grants and Subsidy	10,353	10,353

3. REBATES

Assistance with rents is available under the Housing benefits scheme for those on low income. The scheme is administered by the Council and approximately 50% of tenants received help in 2017/18 (53% in 2016/17). Rent rebates are chargeable to, and the corresponding subsidy is credited to the General Fund.

Subsidy on rent rebates is capped and if the Council's rent exceeds the Government's limit for subsidy, the cost is charged to the HRA. The shortfall on subsidy due to overpayments is charged to the General Fund, as are the administration costs.

Housing Revenue Account

The costs, income and rebates over limitation charged back to the HRA are shown below:

	2017/18 £000	2016/17 £000
Rent Rebates Given (GF)	42,774	42,774
Subsidy Received on Rebates (GF)	(42,774)	(42,774)
Net cost to the HRA	0	0

4. CONTRIBUTIONS TOWARDS EXPENDITURE

	2017/18 £000	2016/17 £000
Court Costs	95	76
Recharges of repairs	4,539	1,073
Recharge to Capital Receipts	455	606
Hostels: Heat, Light and Water Charges	102	92
Other miscellaneous income	102	87
Total Other Income	5,293	1,934

5. SUPERVISION AND MANAGEMENTGeneral expenses

This includes the provision of services to all tenants including rent collection and accounting, rent arrears recovery, tenancy application and lettings, finance and administration, policy and management functions.

Special expenses

This includes the provision of services applicable to particular tenants including central heating, metered energy supplies, maintenance of grounds, communal lighting, lifts and ancillary services.

6. REPAIRS AND MAINTENANCE

This includes day-to-day repairs to Council housing stock and cyclical external decoration. Void properties prior to re-letting and certain tenants' properties are eligible for internal decoration. Repairs & Maintenance expenditure was as follows:

	2017/18 £000	2016/17 £000
Revenue R&M works	15,425	13,992
R&M works charged to MRR	23,771	17,874
Total Repairs and Maintenance	39,196	31,866

Housing Revenue Account

7. CONTRIBUTIONS TO IMPAIRMENT ALLOWANCE

A contribution of £0.984m (2016/17 £0.409m) was transferred from the HRA to an impairment allowance to meet doubtful debts. Details of the accumulated provisions are as follows:

	2017/18 £000	2016/17 £000
Housing Tenants	4,541	4,541
Leaseholders	1,507	1,507
Commercial Properties, Miscellaneous Debts	900	900
Total Impairment Allowance	6,948	6,948

8. HRA OUTSTANDING DEBT (CAPITAL FINANCING REQUIREMENT)

Under the current HRA self-financing system, which began on 1st April 2012, there is no requirement to repay principal on housing debt. The total housing debt at 31st March 2018 was £57.5m

9. NON CURRENT ASSETS VALUATION

A full valuation of the housing stock is commissioned every five years with a market adjustment being applied in the year's in-between. The difference between the value of dwellings in their existing use as social housing and the vacant possession value reflects the economic cost to the council of providing housing at less than open market rents.

	31/03/18 £000	31/03/17 £000
Operational Assets:		
Dwellings (Existing Use Value - Social Housing)	1,255,843	1,229,068
Other Land and Buildings	15,580	14,566
Infrastructure	105	102
Vehicles, Plant and Equipment	7,386	7,413
	1,278,914	1,251,149
Investment Properties	0	0
Surplus Assets	32,386	8,864
Total Housing Assets	1,311,300	1,260,013
Full Valuation of Council Dwellings	5,023,372	4,916,272

Housing Revenue Account

10. DEPRECIATION

The total charge for the depreciation of housing assets is as follows:

	2017/18 £000	2016/17 £000
Operational Assets		
Dwellings	22,059	20,427
Other Land and Buildings	253	243
Infrastructure	4	4
Vehicles, Plant and Equipment	504	477
Total Depreciation	22,820	21,151

11. INTEREST PAYABLE AND SIMILAR CHARGES

This line includes the charge of £4.7m for capital assets calculated in accordance with the DCLG's Item 8 Debit Determination for 2017/18 (£3.1m in 2016/17). It also includes £0.122m for the net cost of amortised loan redemption premiums and discounts (£0.485m 2016/17).

12. PENSIONS COSTS – IAS 19

In accordance with IAS 19, Lewisham recognises the cost of retirement benefits in the net cost of services when they are earned by employees, rather than when the benefits are eventually paid as pensions. However, the cost to the HRA is based on the amounts payable in the year, so the accrued cost of retirement benefits is reversed out of the HRA.

13. HOUSING CAPITAL EXPENDITURE

Any expenditure on the Capital Programme which cannot be capitalised as a component or did not add value to an existing asset has been charged to revenue. These amounts have been mainly funded from the Major Repairs Reserve, which can be used for both revenue and capital expenditure.

	2017/18 £000	2016/17 £000
Expenditure:		
Dwellings	8,397	11,065
Revenue Expenditure Funded from Capital under Statute	0	0
	8,397	11,065
Financed by:		
Capital Receipts	7,912	10,220
Major Repairs Reserve	485	845
Total Capital Expenditure Financed	8,397	11,065

Housing Revenue Account

14. MAJOR REPAIRS RESERVE

The movements on the major repairs reserve are as follows:

	2017/18 £000	2016/17 £000
Balance brought forward at start of year	39,907	37,475
Transferred in (depreciation dwellings)	22,820	21,151
Financing of capital expenditure on housing assets	(485)	(845)
Financing Major Revenue Repairs	(23,771)	(17,874)
Contributions from Revenue (Capital)		
Balance carried forward at end of year	38,471	39,907

15. HOUSING REVENUE ACCOUNT RESERVES AND BALANCES

The movements in housing revenue account reserves and balances are as follows:

	Balance at 31/03/17 £000	Transfers In £000	Transfers Out £000	Balance at 31/03/18 £000
Property and Stock Related Reserves	4,687	195	0	4,882
Staff Related Reserves	750	0	0	750
Other Earmarked Reserves	51,686	12,890	0	64,576
Total Reserves and Balances	57,123	13,085	0	70,208

Collection Fund

SECTION 5 - THE COLLECTION FUND

Lewisham Council is a designated 'Billing' Authority and is required by statute to maintain a separate Collection Fund. The transactions are on an accruals basis and include income from Council Tax and Non-Domestic Rates (NDR) and distributions to the Council's General Fund and the Greater London Authority (GLA) in respect of both Council Tax & NDR, and to the Government in respect of NDR only.

The costs of collecting these taxes are charged to the General Fund, but an allowance towards the cost of collecting NDR is credited to the General Fund from the NDR receipts.

The Council's share of the year end balances of the Collection Fund is included in the Council's Balance Sheet and its share of the transactions is included in the Council's Cash Flow Statement.

COLLECTION FUND REVENUE ACCOUNT

	2017/18			2016/17			Note
	Council Tax	NDR	Total	Council Tax	NDR	Total	
	£000	£000	£000	£000	£000	£000	
INCOME							
Income from Council Tax (net)	129,500		129,500	116,837		116,837	4
Income from Non-Domestic Rates (net) *		66,046	66,046		52,849	52,849	5
Income from Non-Domestic Rates (net) - BRS *		1,742	1,742		1,335	1,335	5
TOTAL INCOME	129,500	67,788	197,288	116,837	54,184	171,021	
EXPENDITURE							
Precepts and Demands upon Fund (C. Tax)							
- London Borough of Lewisham	93,874		93,874	86,590		86,590	
- Greater London Authority **	22,706		22,706	21,674		21,674	
Precepts and Demands upon Fund (NDR)							
- London Borough of Lewisham		20,285	20,285		15,515	15,515	
- Greater London Authority		25,667	25,667		10,426	10,426	
- Central Government		21,665	21,665		26,064	26,064	
- Cost of Collection Allowance		332	332		303	303	
Business Rate Supplement (BRS)							
- Paid to Greater London Authority		1,914	1,914		1,334	1,334	
- Administrative Costs		8	8		3	3	
Bad and Doubtful Debts							
- Net adj to Impairment Allowance	3,728		3,728	2,813		2,813	6a
- Net adj to Impairment Allowance		(517)	(517)		(811)	(811)	6b
- Amounts Written Off	816		816	101		101	
- Amounts Written Off		884	884		807	807	
Contributions from previous year							
- London Borough of Lewisham	3,853		3,853	2,938		2,938	
- Greater London Authority **	964		964	817		817	
Provision for Appeals							
- Net contribution		(1,058)	(1,058)		487	487	
TOTAL EXPENDITURE	125,941	69,180	195,121	114,933	54,128	169,061	
Deficit / (Surplus) for the year	(3,559)	1,392	(2,167)	(1,904)	(56)	(1,960)	3
Deficit / (Surplus) at start of year	(6,013)	5,820	(193)	(4,109)	5,876	1,767	3
Deficit / (Surplus) at end of year	(9,572)	7,212	(2,360)	(6,013)	5,820	(193)	

Collection Fund

NOTES TO THE COLLECTION FUND

1. THE COUNCIL TAX BASE AND THE "BAND D" EQUIVALENT

The annual budget process requires that each Council determines its own 'Band D' tax charge by dividing its own budget requirement by the respective tax base for the financial year. The 'Band D' tax calculated forms the basis of the charge for all properties. Properties fall into one of eight valuation bands based on market values at 1st April 1991. Those that fall in other valuation bands pay a proportion of the 'Band D' tax charge according to its banding and the band proportion.

The tax base used in setting the Council Tax is set by the end of January for the following financial year. It is based on the actual number of dwellings on the Valuation List that fall within each valuation band. The total in each band is adjusted for exemptions, single person occupancy discounts, discounts for second homes and long term empty properties, disabled band relief and new properties. The total for each band is then expressed as a "Band D" equivalent number by multiplying the resulting total by the relevant band proportion. The tax base for 2017/18 assumed a collection rate of 96.0% (96.0% for 2016/17).

The table below sets out the original tax base calculation for 2017/18 and has been prepared in accordance with The Welfare Reform Act that abolished the system of council tax benefits and replaced it with the Council Tax Reduction Scheme (CTRS) with effect from 1st April 2013.

Council Tax Band	Property Value £000	2017/18		Band D Ratio	2017/18		2016/17	
		No. of Properties			Band D Equivalents as per Ratio No.	Council Tax Charge £	Band D Equivalents as per Ratio No.	Council Tax Charge £
		Actual	Adjusted					
		Number	Number					
(1)	(2)							
A	up to 40	7,726	4,245	6/9	2,830.2	£958.47	2,691.8	919.11
B	40 - 52	33,691	22,319	7/9	17,359.6	£1,118.21	16,616.3	1,072.29
C	52 - 68	43,868	32,780	8/9	29,138.1	£1,277.95	27,942.6	1,225.47
D	68 - 88	25,762	21,256	1	21,256.1	£1,437.70	20,872.8	1,378.66
E	88 - 120	7,413	6,453	11/9	7,887.1	£1,757.19	7,724.3	1,685.02
F	120 - 160	2,736	2,519	13/9	3,639.0	£2,076.68	3,623.0	1,991.40
G	160 - 320	1,292	1,222	15/9	2,036.7	£2,396.16	2,016.3	2,297.76
H	over 320	169	160	18/9	319.5	£2,875.41	313.5	2,757.32
Totals		122,657	90,955		84,466.3		81,800.6	
Add: Contributions in lieu					0.0		0.0	
Total Band D Equivalents					84,466.3		81,800.6	
Estimated Collection Rate					96.0%		96.0%	
NET COUNCIL TAX BASE					81,087.6		78,528.6	

(1) Total number of dwellings as per Valuation Officer's List

(2) Total number of dwellings after allowing for Discounts, Exemptions and Other Adjustments

2. COLLECTION FUND SURPLUS OR DEFICIT

Every January, a forecast of the estimated Collection Fund balance at the end of the financial year is made. This estimated surplus or deficit is then distributed to or recovered from the Council and the GLA in the following year in proportion to their respective annual demands made on the Fund. Any difference between the estimated and actual year-end balance on the Fund is taken into account as part of the forecast to be made of the Fund's balance during the following financial year.

Collection Fund

3. COLLECTION FUND BALANCE SPLIT INTO ITS ATTRIBUTABLE PARTS

	(Surplus)/ Deficit			(Surplus)/ Deficit	
	Balance at 31/03/16 £000	Movement in 2016/17 £000	Balance at 31/03/17 £000	Movement in 2017/18 £000	Balance at 31/03/18 £000
Council Tax					
London Borough of Lewisham	(3,220)	(1,622)	(4,842)	(2,954)	(7,796)
Greater London Authority	(889)	(282)	(1,171)	(605)	(1,776)
	(4,109)	(1,904)	(6,013)	(3,559)	(9,572)
Non-Domestic Rates					
London Borough of Lewisham	1,764	(17)	1,747	418	2,165
Greater London Authority	1,175	(11)	1,164	278	1,442
Central Government	2,937	(28)	2,909	696	3,605
	5,876	(56)	5,820	1,392	7,212
Collection Fund Balances	1,767	(1,960)	(193)	(2,167)	(2,360)

Collection Fund Adjustment Account

The Council's share of the Collection Fund balance is managed by the Collection Fund Adjustment Account which shows the differences arising from the recognition of Council Tax income in the CIES as it falls due from Council Tax payers compared with the statutory arrangements for paying across amounts to the General Fund from the Collection Fund.

4. COUNCIL TAX INCOME

	2017/18		2016/17
	£000	£000	£000
Gross Council Tax Income Due		164,523	156,659
Less: Adjustments to charge	2,276		2,250
Exemptions	(5,290)		(4,106)
Disabled Relief	(99)		(77)
Discounts	(15,011)		(15,462)
Adjustment for Council Tax Reduction Scheme	(16,898)		(22,427)
		(35,022)	(39,822)
Total Due from Council Tax payers		129,501	116,837

Collection Fund

5. NON-DOMESTIC RATES

The Council is responsible for collecting the Non-Domestic Rates (NDR) (often referred to as Business Rates) which are payable within its area. The amount payable is based upon the rateable value of commercial properties multiplied by the NDR multiplier, which is set annually by the Government. The amount due is paid as precepts to London Borough of Lewisham's General Fund (30%), Greater London Authority (20%) and Central Government (50%).

	2017/18		2016/17
	£000	£000	£000
Gross NDR Collectable (after voids and exemptions)		84,538	65,511
Reductions and Relief:			
Mandatory Relief	(15,044)		(10,942)
Discretionary Relief	(1,706)		(385)
		(16,750)	
Total Receivable from Business Rates		67,788	54,184

	2017/18	2016/17
	£m	£m
Non-Domestic Rateable Value	191.0	139.2

	2017/18	2016/17
	pence	pence
Non-Domestic Rate Multiplier	47.9	49.7
Non-Domestic Rate Multiplier (Small Business)	46.6	48.4

6. COLLECTION FUND ARREARS AND IMPAIRMENT ALLOWANCES

a) Council Tax

	31/03/18	31/03/17
	£000	£000
Council Tax Arrears	40,203	36,008
Impairment Allowance	(37,157)	(33,430)
As a Percentage of Arrears	92.4%	92.8%

	2017/18		2016/17	
	Amount	Percentage	Amount	Percentage
	£000	%	£000	%
Age of Arrears				
Year of Accounts	8,018	20	6,229	17
Under 2 Years old	4,533	11	4,384	12
Under 3 Years old	3,855	10	3,708	10
Under 5 Years old	6,661	17	6,348	18
Over 5 Years old	17,136	43	15,339	43
Total	40,203	100	36,008	100

Collection Fund

Arrears of income from court costs and penalties resulting from recovery action are accounted for in the General Fund.

b) Non-Domestic Rates

	31/03/2018 £000	31/03/17 £000
NDR Arrears	3,272	3,957
Impairment Allowance	(1,822)	(2,338)
As a Percentage of Arrears	55.7%	59.1%

	2017/18		2016/17	
	Amount £000	Percentage %	Amount £000	Percentage %
Age of Arrears				
Year of Accounts	1,250	38	1,458	37
Under 2 Years old	634	19	585	15
Under 3 Years old	312	10	316	8
Under 5 Years old	378	12	714	18
Over 5 Years old	698	21	884	22
Total	3,272	100	3,957	100

Arrears of income from court costs and penalties resulting from recovery action are accounted for in the General Fund.

Group Accounts

SECTION 6 – GROUP ACCOUNTS

In order to provide a full picture of the Council's economic activities and financial position, the accounting statements of the Council and its wholly owned local authority trading companies, Lewisham Homes Ltd and Catford Regeneration Partnership Ltd have been consolidated.

The group accounts are presented in addition to the Council's "single entity" financial statements and comprise:

- Group Comprehensive Income and Expenditure Statement
- Group Movement in Reserves Statement;
- Group Balance Sheet; and
- Group Cash flow Statement

These statements (the purposes of which are explained on pages 3 and 4), together with those explanatory notes that are considered necessary in addition to those accompanying the "single entity" accounts and accounting policies are set out in the following pages.

Group Accounts

GROUP COMPREHENSIVE INCOME AND EXPENDITURE STATEMENT FOR YEAR ENDING 31ST MARCH 2018

2016/17				2017/18		
Gross Expenditure £000s	Gross Income £000s	Net Expenditure £000s		Gross Expenditure £000s	Gross Income £000s	Net Expenditure £000s
			SERVICE			
379,729	(305,440)	74,289	Children & Young People	251,594	(310,848)	(59,254)
174,877	(72,459)	102,418	Community Services	171,781	(92,334)	79,447
344,153	(287,254)	56,899	Customer Services	346,165	(289,579)	56,586
54,619	(30,733)	23,886	Resources & Regeneration	60,011	(47,598)	12,413
90,852	(98,510)	(7,658)	HRA	105,107	(100,748)	4,359
21,649	(41,967)	(20,318)	Corporate Services	7,305	(5,553)	1,752
1,065,879	(836,363)	229,516	Cost of Services	941,963	(846,660)	95,303
			Other Operating Expenditure			
0	(9,823)	(9,823)	(Gain) / Loss on the disposal of non-current assets	0	(8,182)	(8,182)
1,632	0	1,632	Levies	1,638	0	1,638
1,947	0	1,947	Contribution of housing capital receipts to Government Pool	1,927	0	1,927
3,579	(9,823)	(6,244)		3,565	(8,182)	(4,617)
			Financing and Investment Income and Expenditure			
34,552	0	34,552	Interest payable and similar charges	33,332	0	33,332
0	0	0	Loan Restructuring	23,314	0	23,314
443	(3,083)	(2,640)	Interest and Investment Income	837	(2,981)	(2,144)
57,359	(36,207)	21,152	Net interest on the net defined benefit liability	49,554	(32,512)	17,042
92,354	(39,290)	53,064		107,037	(35,493)	71,544
			Taxation and non-specific Grant Income			
0	(89,527)	(89,527)	Income from Council Tax	0	(97,726)	(97,726)
0	(59,608)	(59,608)	General Government Grants	0	(58,390)	(58,390)
0	(15,577)	(15,577)	Recognised Capital Grants and Contributions	0	(18,474)	(18,474)
0	(87,083)	(87,083)	Non-Domestic Rates income and expenditure	0	(92,188)	(92,188)
31	0	31	Corporation Tax Payable	56	0	56
31	(251,795)	(251,764)		56	(266,778)	(266,722)
		24,572	Deficit/(Surplus) on provision of services			(104,492)
		(101,871)	Surplus or deficit on revaluation of non-current assets			(154,020)
		19,316	Remeasurement of the net defined benefit liability			(38,950)
		(82,555)	Other Comprehensive Income and Expenditure			(192,970)
		(57,983)	Total Comprehensive Income and Expenditure			(297,462)

Group Accounts

GROUP MOVEMENT IN RESERVES STATEMENT - YEAR ENDING 31ST MARCH 2018

YEAR ENDING 31ST MARCH 2018	General Fund Balance £000	Earmarked Gen Fund Reserves £000	Housing Revenue Account £000	Major Repairs Reserve £000	Capital Receipts Reserve £000	Capital Grants Unapplied £000	Total Usable Reserves £000	Unusable Reserves £000	Total Authority Reserves £000
Balance at 31 March 2017 Brought Forward	13,000	150,491	63,686	39,907	55,495	14,132	336,711	1,134,922	1,471,633
Movement in Reserves during 2017/18									
Surplus or (Deficit) on the provision of services	106,322	630	(2,229)	0	0	0	104,723	0	104,723
Other Comprehensive Income and Expenditure	0	(1,058)	(820)	0	0	0	(1,878)	193,922	192,044
Total Comprehensive Income and Expenditure	106,322	(428)	(3,049)	0	0	0	102,845	193,922	296,767
Adjustments between accounting basis and funding basis under regulations	(95,776)	696	18,553	(1,436)	(7,145)	3,167	(81,941)	82,636	695
Net Increase / Decrease before Transfers to Earmarked Reserves	10,546	268	15,504	(1,436)	(7,145)	3,167	20,904	276,558	297,462
Transfers to / from Earmarked Reserves	(10,546)	10,546	0	0	0	0	0	0	0
Increase / (Decrease) in 2017/18	0	10,814	15,504	(1,436)	(7,145)	3,167	20,904	276,558	297,462
Balance at 31 March 2018 Carried Forward	13,000	161,305	79,190	38,471	48,350	17,299	357,615	1,411,480	1,769,095

Group Accounts

GROUP MOVEMENT IN RESERVES STATEMENT - YEAR ENDING 31ST MARCH 2017

YEAR ENDING 31ST MARCH 2017	General Fund Balance £000	Earmarked Gen Fund Reserves £000	Housing Revenue Account £000	Major Repairs Reserve £000	Capital Receipts Reserve £000	Capital Grants Unapplied £000	Total Usable Reserves £000	Unusable Reserves £000	Total Authority Reserves £000
Balance at 31 March 2016 Brought Forward	13,000	153,084	47,222	37,475	57,231	8,149	316,161	1,097,489	1,413,650
Movement in Reserves during 2016/17									
Surplus or (Deficit) on the provision of services	(33,272)	233	8,421	0	0	0	(24,618)	0	(24,618)
Other Comprehensive Income and Expenditure	0	125	0	0	0	0	125	82,555	82,680
Total Comprehensive Income and Expenditure	(33,272)	358	8,421	0	0	0	(24,493)	82,555	58,062
Adjustments between accounting basis and funding basis under regulations	30,321	0	11,320	(845)	(1,736)	5,983	45,043	(45,122)	(79)
Net Increase / Decrease before Transfers to Earmarked Reserves	(2,951)	358	19,741	(845)	(1,736)	5,983	20,550	37,433	57,983
Transfers to / from Earmarked Reserves	2,951	(2,951)	(3,277)	3,277	0	0	0	0	0
Increase / (Decrease) in 2016/17	0	(2,593)	16,464	2,432	(1,736)	5,983	20,550	37,433	57,983
Balance at 31 March 2017 Carried Forward	13,000	150,491	63,686	39,907	55,495	14,132	336,711	1,134,922	1,471,633

Group Accounts

GROUP BALANCE SHEET AS AT 31ST MARCH 2018

31/03/2017 £000		31/03/2018 £000
	Property, Plant & Equipment	
1,229,068	Council dwellings	1,285,145
790,795	Other land and buildings	1,011,061
29,292	Vehicles, plant, furniture and equipment	26,787
114,893	Infrastructure	117,424
4,982	Community	4,975
76,893	Surplus Assets not held for Sale	94,623
26,494	Assets under Construction	26,726
2,272,417		2,566,741
257	Heritage Assets	257
14,872	Investment Property	14,672
2,049	Long term investments	2,076
6,377	Long term debtors	6,684
2,295,972	Total Long Term Assets	2,590,430
280,731	Short Term Investments	310,648
229	Inventories	189
48,162	Debtors	46,551
94,276	Cash and Cash Equivalents	107,606
3,637	Prepayments	3,941
427,035	Current Assets	468,935
3,717	Bank Overdraft	9,553
26,854	Short term borrowing	42,468
3,789	Provisions	3,796
79,600	Creditors	81,052
76,789	Receipts in advance	90,493
7,580	PFI Liabilities due within one year	7,945
198,329	Current Liabilities	235,307
2,524,678	Total Assets less Current Liabilities	2,824,058
166,126	Long term borrowing	179,453
4,843	Provisions	5,793
236,196	Deferred PFI Liabilities	228,124
1,616	Capital Grants Receipts in Advance	1,858
644,264	Liability related to defined benefit pension scheme	639,735
1,053,045	Long Term Liabilities	1,054,963
1,471,633	NET ASSETS	1,769,095
	Usable Reserves	
13,000	General Fund Balance	13,000
149,577	Earmarked Revenue Reserves	160,123
6,563	Lewisham Homes Reserves	8,981
914	Catford Regeneration Partnership Reserves	1,182
57,123	Housing Revenue Account	70,209
39,907	Major Repairs Reserve	38,471
55,495	Usable Capital Receipts Reserve	48,350
14,132	Capital Grants Unapplied	17,299
336,711		357,615
	Unusable Reserves	
891,997	Revaluation Reserve	1,026,385
895,587	Capital Adjustment Account	1,052,696
95	Deferred capital receipts	93
(3,841)	Financial Instruments Adjustment Account	(26,450)
(644,264)	Pensions Reserve	(639,735)
3,096	Collection Fund Adjustment Account	5,547
(7,748)	Short Term Compensated Absences Account	(7,056)
1,134,922		1,411,480
1,471,633	TOTAL RESERVES	1,769,095

Group Accounts

GROUP CASH FLOW STATEMENT FOR THE YEAR ENDING 31ST MARCH 2018

2016/17 £000s		2017/18 £000s
(24,226)	Net surplus or (deficit) on the provision of services	104,723
105,776	Adjustment to surplus or deficit on the provision of services for noncash movements	(48,914)
(42,699)	Adjust for items included in the net surplus or deficit on the provision of services that are investing and financing activities	(33,185)
38,851	Net Cash flows from operating activities	22,624
(40,791)	Net Cash flows from Investing Activities	(54,033)
(6,142)	Net Cash flows from Financing Activities	38,903
(8,082)	Net increase or (decrease) in cash and cash equivalents	7,494
98,641	Cash and cash equivalents at the beginning of the reporting period	90,559
90,559	Cash and cash equivalents at the end of the reporting period	98,053

Group Accounts

Notes to the Group Accounts**1. General**

The Group Accounts should be read in conjunction with the Lewisham Council single entity accounts on pages 3 to 88. Only notes to the accounts that are materially different from the single entity accounts are produced for the group accounts.

2. Group Boundary

The Council has an interest in a number of entities, the most significant of which are the wholly owned subsidiaries Lewisham Homes Ltd and Catford Regeneration Partnership Ltd which are consolidated into these accounts. The table below provides information on the nature of company business and associated risks:

Company	Business	Risks
Lewisham Homes Ltd	An arms-length management organisation (ALMO) set up in 2007 as part of the Council's initiative to deliver better housing services and achieve the Decent Homes Standard. The company manages approximately 18,000 homes.	If Lewisham Homes was in any way unable to deliver a satisfactory housing management service, the Council would have to provide such a service itself
Catford Regeneration Partnership Ltd (CRPL)	The company owns the Catford Shopping Centre and aims to drive forward a regeneration programme for the town centre and the surrounding area.	As a property investment company, CRPL is exposed to risk in market movements in terms of the capital value of properties and in the level of income that can be generated through rental charges

3. Accounting Policies

In preparing the Group Accounts the Council has aligned the accounting policies of its companies with those of the Council and made consolidation adjustments where necessary. It has consolidated the companies' financial statements with those of the Council on a line by line basis and has eliminated in full balances, transactions, income and expenses between the Council and its subsidiaries.

4. Investment Properties

Whilst the Council has no investment properties, CRPL owns Catford shopping centre and several surrounding properties. As these properties were solely being used to generate income at 31 March 2018, under the code of practice they are classed as investment properties.

The fair value of the properties owned by CRPL as at 31 March 2018 was £14.672m.

5. Pensions

Lewisham Homes Ltd is a scheduled body in the London Borough of Lewisham Pension Fund. The Council has indemnified Lewisham Homes against any liability that may arise on its notional share of the Pension Fund's assets and obligations.

Glossary of Terms Used in the Accounts

SECTION 7 - GLOSSARY OF TERMS USED IN THE ACCOUNTS

ACCRUALS	These are amounts included in the accounts to cover income and expenditure attributable to the financial year, but for which payment had not been received or made as at 31 March.
ACTUARY	An independent professional who advises on the financial position of the Pension Fund and carries out a full valuation every three years.
CAPITAL EXPENDITURE	This is expenditure on the acquisition or enhancement of assets which significantly prolongs their useful lives or increases their market value. This is considered to be of benefit to the Council over a period of more than one year, e.g. land and buildings.
CAPITAL ADJUSTMENT ACCOUNT	This represents the capital resources which have been set aside to meet past capital expenditure.
CAPITAL RECEIPTS	Income received from the sale of land, buildings and plant.
COLLECTION FUND	A separate statutory account into which Council Tax and Non-Domestic Rates (NDR) are paid in order to account for payments due to the Council's General Fund and Preceptors (currently the Greater London Authority for Council Tax and NDR, and Central Government for NDR).
CONTINGENT LIABILITY	A possible liability to incur future expenditure at the balance sheet date dependent upon the outcome of uncertain events.
CREDITORS	This is an amount of money owed by the Council for goods, works or services received.
DEBTORS	This is an amount of money owed to the Council by individuals and organisations.
DEPRECIATION	This is the loss in value of an asset due to age, wear and tear, deterioration or obsolescence. An annual charge in respect of this is made to service revenue accounts over the life of most assets to reflect the usage in the year.
EARMARKED RESERVES	These are amounts set aside for specific purposes to meet future commitments or potential liabilities, for which it is not appropriate to establish provisions.
FAIR VALUE	This is defined as the amount for which an asset could be exchanged or liability settled, assuming that the transaction was negotiated between parties knowledgeable about the market in which they are dealing and willing to buy/sell at an appropriate price, with no other motive in their negotiations other than to secure a fair price.
GENERAL FUND	This is the account which comprises the revenue costs of providing services, which are met by General Government Grants and the Council's demand on the Collection Fund.
INFRASTRUCTURE	These are non-current assets which do not have a market value and primarily exist to facilitate transportation and communication (e.g. roads, street lighting). They are usually valued at historic cost.

Glossary of Terms Used in the Accounts

LEASES	<p>A Lease is an agreement whereby the lessor conveys to the lessee in return for a payment or series of payments the right to use an asset for an agreed period of time. The definition of a lease includes hire purchase contracts. Lease classification is made at the inception of the lease.</p> <p>A Finance lease is a lease that transfers substantially all the risk and rewards incidental to ownership of an asset. Title may or may not eventually be transferred. An Operating lease is a lease other than a finance lease.</p>
MEMORANDUM ACCOUNT	<p>These Accounts are not part of the Council's formal statutory Accounts and are included in the Statement for added information.</p>
MINIMUM REVENUE PROVISION (MRP)	<p>The prudent amount which must be charged to the Council's revenue account each year for the principal repayment of debt.</p>
NON-DOMESTIC RATES (NDR)	<p>Also known as Business Rates, these are set by the Government and collected by the Council. The income due is paid as precepts to the Council's General Fund, the Greater London Authority and Central Government.</p>
PRIVATE FINANCE INITIATIVE (PFI)	<p>This is a scheme whereby contracts for specified services are let to private sector suppliers by the Council which may include capital investment as well as the provision of the service. Payments are made to the supplier in return, which are reduced if performance targets are not met.</p>
PRECEPTS	<p>These are demands made upon the Collection Fund by the Council's General Fund and the Greater London Authority in accordance with their budget requirements. A share of the NDR precept is also paid to Central Government.</p>
PROVISIONS	<p>This is an amount which is set-aside for a specific liability or loss, which is likely to be incurred, but where the exact amount and date on which they will arise is uncertain.</p>
REVALUATION RESERVE	<p>This represents the gains on the revaluation of non-current assets which have not yet been realised through sales.</p>
REVENUE SUPPORT GRANT (RSG)	<p>This is the main general grant which is paid to the Council by Central Government to fund local services.</p>
REVENUE EXPENDITURE	<p>Day-to-day expenditure incurred in the running of Council services, e.g. salaries, wages, supplies and services.</p>
SPECIAL PURPOSE VEHICLE	<p>This is a legal entity (usually a limited company) created to fulfil narrow, specific or temporary objectives.</p>
SUPPORT SERVICES	<p>These are activities of a professional, technical and administrative nature which are not Council services in their own right, but support main front-line services.</p>

Glossary of Terms Used in the Accounts

COMMON ACRONYMS USED IN THE ACCOUNTS

CIES	Comprehensive Income and Expenditure Statement
CIPFA	Chartered Institute of Public Finance and Accountancy
COP	Code of Practice on Local Authority Accounts in the United Kingdom
DSG	Dedicated Schools Grant
DfE	Department for Education
HRA	Housing Revenue Account
IAS	International Accounting Standards
IFRS	International Financial Reporting Standards
LEP	Local Education Partnership
LGPS	Local Government Pension Scheme
LPFA	London Pensions Fund Authority
LSP	Local Strategic Partnership
MiRS	Movement in Reserves Statement
MRP	Minimum Revenue Provision
NDR	Non-Domestic Rates
PFI	Private Finance Initiative
RICS	Royal Institution of Chartered Surveyors
SeRCOP	Service Reporting Code of Practice
SPV	Special Purpose Vehicle
SSAP	Statement of Standard Accounting Practice
TfL	Transport for London
TPS	Teachers' Pensions Scheme
VAT	Value Added Tax

PENSION FUND

PENSION FUND ACCOUNTS

FOREWORD

This Pension Fund Statement of Accounts details the financial position and performance of the Lewisham Pension Fund for the year 2017/18.

The Pension Fund's value increased over the year by £29m (2.3%), a year which saw the Fund initiate a rebalancing exercise by selling a proportion of its equity holdings to reinvest in alternative asset classes, being diversified growth and multi-asset credit, in line with the Fund's agreed Investment and Funding Strategies following the triennial valuation of 2016.

INTRODUCTION

The London Borough of Lewisham Pension Fund ('the Fund') is part of the Local Government Pension Scheme. The Fund is a contributory defined benefit pension scheme administered by the London Borough of Lewisham to provide benefits to London Borough of Lewisham employees and former employees and admitted and scheduled bodies. These benefits include retirement allowances and pensions payable to former employees and their dependants, lump sum death gratuities and special short-term pensions. The Fund is financed by income from investments and contributions from employees, the Council and other admitted and scheduled bodies.

ORGANISATION

The fund is governed by the Public Service Pensions Act 2013. The fund is administered in accordance with the following secondary legislation:

- The Local Government Pension Scheme Regulations 2013 (as amended);
- The Local Government Pension Scheme (Transition Provisions, Savings and Amendment) Regulations 2014 (as amended); and
- The Local Government Pension Scheme (Management and Investment of Funds) Regulations 2016.

Formal responsibility for investment management of the Pension Fund is delegated to the Council's Pensions Investment Committee (PIC), which appoints and monitors external investment managers. Each investment manager has an individual performance target and benchmark tailored to balance the risk and return appropriate to the element of the Fund they manage. The investment managers also have to consider the PIC's views on socially responsible investments. Details of the Socially Responsible Investment policy are contained in the Investment Strategy Statement (see web address below).

The Pension Board operates independently of PIC and assists the administering authority in securing compliance with the Regulations and any other legislation relating to the governance and administration of the Scheme. Further information about the Board, together with its Terms of Reference, can be found at the website further below.

The Pension Fund administration is managed by a small in-house team, which is also responsible for other areas of work such as redundancy payments, gratuities and teachers compensation.

A statement of the Fund's corporate governance, funding strategy and investment strategy can be found on the authority's pension's website, at the following address:

www.lewishampensions.org

PENSION FUND

ACCOUNTING POLICIES

The Pension Fund accounts have been prepared in accordance with the Code of Practice on Local Authority Accounting in the United Kingdom 2017/18 which is based upon International Financial Reporting Standards (IFRS), as amended for the UK public sector.

The accounts summarise the transactions of the Fund and report on the net assets available to pay pension benefits. The accounts do not take account of the obligations to pay pensions and benefits which fall due after the end of the financial year. In respect of future obligations, the actuarial present value of promised retirement benefits, valued on an International Accounting Standard (IAS) 19 basis.

The Local Government Pension Scheme (Administration) Regulations 2013 requires administering authorities in England and Wales to prepare a Pension Fund Annual Report which must include the Fund Account and a Net Assets Statement with supporting notes prepared in accordance with proper practices. The Regulations summarise the Pension Code and the minimum disclosure requirements.

The date for publishing the Pension Fund Annual Report is on or before 1 December following the end of the financial year. The Council will be taking its Annual Report to its Pensions Investment Committee later in the year to comply with this deadline.

A summary of the significant accounting policies and the basis of preparation of the accounts are shown below:

- (a) Fund Assets at 31 March 2018 – the below table outlines the fund managers, asset classes, and values of those assets held by the fund as at 31 March 2018:

Fund Manager	Asset	Asset Value 31 March 2018 £000	Proportion of the Fund 31 March 2018 %	Asset Value 31 March 2017 £000
Blackrock	Passive Equity and Bonds	484,194	37.2	549,121
UBS	Passive Equity and Bonds	478,595	36.7	544,085
Schroders Property	Property	111,446	8.5	100,946
Invesco	Diversified Growth/Targeted Returns	77,240	5.9	0
Pemberton	Multi-Asset Credit	27,717	2.1	0
HarbourVest	Private Equity	51,036	3.9	49,481
M&G	Credit	8,927	0.7	8,822
Securities Lending	Securities Lending	122	0.0	119
Unallocated Funds	Cash	64,809	5.0	18,662
Lewisham	Cash and Net Current Liabilities	(560)	0.0	3,333
Total Fund Assets		1,303,526	100.0	1,274,569

- (b) Basis of Preparation - The accounts have been prepared on an accruals basis (i.e. income and expenditure attributable to the financial year have been included) even where payment has not actually been made or received, except Transfer Values which are prepared on a cash basis. The financial statements do not take account of liabilities to pay pensions and other benefits due after the period end; these are reported upon separately in the Actuary's report and reflected in the Council's income and expenditure account. The accounts are prepared on a going concern basis for accounting purposes.
- (c) Investments - Investments in the Net Assets Statement are shown at Fair Value, the basis of measurement being market value based on bid prices, as required by IAS 26 Retirement Benefit Plans outlined in the 2017/18 Local Authority Code of Practice and in accordance with the provisions of IAS 39 Financial Instruments: Recognition and Measurement. The market value of equity investments is based on the official closing data, in the main, with last trade data being used in a small number of countries. Unitised equities are quoted based on last trade or official closing price. Northern Trust, the Fund's custodian, sets out its pricing policies in a document entitled "Asset pricing guidelines" which details its pricing process and sets out preferred pricing sources and price types.

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- (d) The change in market value of investments during the year comprises all increases and decreases in market value of investments held at any time during the year, including profits and losses realised on the sale of investments during the year.
- (e) Income - Dividend income earned from equity and bonds with BlackRock is reinvested and not repaid directly to the fund as cash, but from UBS is repaid to the Fund. Interest income is recognised in the Fund as it accrues. Any amount not received by the end of the accounting period will be disclosed in the note on Debtors and Creditors.
- (f) Private equity investments are valued in accordance with United States generally accepted accounting principles, including FAS 157, which is consistent with the International Private Equity and Venture Capital Valuation Guidelines. These guidelines set out that all investments are carried at fair value and they recommend methodologies for measurement. Due to timing differences in the valuation of this investment, the value carried in the accounts as at 31 March 2018 is the actual fair value using the latest available valuation on or after 31 December 2017, plus an estimated valuation for the period up to 31 March 2018.
- (g) Property – The Fund does not have any direct investments in property, but does use a property Fund of Funds manager, Schroders, to invest in pooled property/unit trust funds. The Schroders funds are all currently valued at least quarterly. The majority of property assets to which the fund has exposure are located in the UK. They are valued in accordance with the Royal Institution of Chartered Surveyors' Valuation Standards at Fair Value based on their Open Market Value (OMV).

The only non-UK fund is the Real Continental European Fund. The net asset value is derived from the net asset value of the underlying funds. Like the UK, the values of the underlying assets are assessed by professionally qualified valuers. Valuation practices will differ between countries according to local Generally Accepted Accounting Practices. The frequency of independent valuations varies. All the property funds are independently valued on a rolling basis at least annually.

- (h) Financing Fund - The fair value of the M&G fund is based on different pricing policies depending on the instrument being valued. The fund is close to maturity with debt instruments being repaid; at this stage of its life fund valuations are based on the manager's own internal valuation model which makes use of discounted cash flows. Due to timing differences in the valuation of this investment, the value carried in the accounts as at 31 March 2018 is the actual fair value using the latest available valuation on or after 31 December 2017, plus an estimated valuation for the period up to 31 March 2018.
- (i) Diversified Growth/Targeted Returns Fund – The pension fund is allocated notional units in the Invesco fund based on its overall contribution. Units will be valued on every business day in which units are created and realised. The value given to the fund's assets will be the recognised market quotation; if this is not available, the latest independent valuation will be used. Where no independent valuation can be used, the value will be determined by the manager in such manner as it deems appropriate.
- (j) Multi-Asset Credit Fund – the Pemberton private debt fund is valued at Fair Value using external benchmarks such as the equity values of comparable companies to borrowers, Credit Default Swap or commodity price movements and macro-economic data.
- (k) Contributions – These represent the total amounts received from the employers and employees within the scheme. From 1 April 2017 the employee contribution bands (revised annually in line with inflation) are as follows:

Full Time Pay for the Post	Contribution Rate 2017/18
Up to £13,700	5.5%
£13,701 to £21,400	5.8%
£21,401 to £34,700	6.5%
£34,701 to £43,900	6.8%
£43,901 to £61,300	8.5%
£61,301 to £86,800	9.9%
£86,801 to £102,200	10.5%
£102,201 to £153,300	11.4%
More than £153,301	12.5%

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The employer's contribution is reviewed every three years and is determined by the fund's Actuary as the rate necessary to ensure that the Fund is able to meet its long-term liabilities. This is assessed at each triennial actuarial revaluation. The employer's contribution rate for 2017/18 is 22.5% and for 2018/19 it will remain unchanged.

- (l) Benefits – Benefits payable are made up of pension payments and lump sums payable to members of the Fund upon retirement and death. These have been brought into the accounts on the basis of all valid claims approved during the year.
- (m) Transfer Values – Transfer values are those sums paid to, or received from, other pension schemes relating to periods of previous pensionable employment. Transfer values are calculated in accordance with the Local Government Pension Scheme Regulations and have been brought into the accounts on a cash basis.
- (n) Taxation – The fund is a registered public service scheme under section (1) of Schedule 36 of the Finance Act 2004 and as such is exempt from UK income tax on interest received and from capital gains tax on the proceeds of investments sold. Income from overseas investments suffers withholding tax in the country of origin, unless exemption is permitted. Irrecoverable tax is accounted for as an expense as it arises.
- (o) VAT – By virtue of Lewisham Council being the administrating authority, VAT input tax is recoverable on fund activities. Any irrecoverable VAT is accounted for as an expense.
- (p) Actuarial – The adequacy of the Fund's investments and contributions in relation to its overall and future obligations is reviewed every three years by an Actuary appointed by the Council. The Council's Actuary, Hymans Robertson, assesses the Fund's assets and liabilities in accordance with Regulation 77 of the Local Government Scheme Regulations 1997. The contribution rate required for benefits accruing in future is assessed by considering the benefits which accrue over the course of the three years to the next valuation.

The most recent triennial valuation carried out under Regulation 36 of the LGPS (Administration) Regulations 2008 was as at 31 March 2016.

Some of the triennial valuation financial assumptions made, with comparison to the previous valuation, are presented in the table below:

Financial Assumption	March 2016 (%)	March 2013 (%)
Discount Rate	4.0	4.6
Price Inflation (CPI*)	2.1	2.5
Pay Increases	2.9	4.3
Pension Increase:		
Pension in excess of GMP**	2.1	2.5
Post - 88 GMP	2.1	2.5
Pre - 88 GMP	0.0	0.0
Revaluation of Deferred Pension	2.1	2.5
Expenses	0.6	0.7

* Consumer Price Index

** Guaranteed Minimum Pension

With effect from the 1 April 2016, the actuarial review carried out for 31 March 2013 resulted in increases to the Council's contribution rate up to 22.5%.

The triennial valuation on the 31 March 2016 revealed that the Fund's assets, which at 31 March 2016 were valued at £1,041 million, were sufficient to meet 78% (71% in 2013) of the past service liabilities valued at £1,328 million (£1,215 million in 2013) accrued up to that date. The resulting deficit as at the 2016 valuation was £288 million (£348 million in 2013).

- (q) Actuarial Present Value of Promised Retirement Benefits – The Actuary has calculated the actuarial present value of future retirement benefits (on an IAS 19 basis) to be £1,934 million as at 31 March 2018 (£1,847 million as at 31 March 2017).

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- (r) Investment Management and Administration - paragraph 42 of the Local Government Pension Scheme (Administration) Regulations 2008, permit the Council to charge the scheme's administration costs to the Fund. A proportion of relevant Council officers' salaries, including related on-costs, have been charged to the Fund on the basis of actual time spent on scheme administration and investment-related business. The fees of the Fund's general investment managers are charged on a quarterly basis and are generally calculated as a set percentage of the market value funds under management as at the end of those quarters. Some managers invoice fees, others deduct fees from asset holdings; in the latter instance, the fees are added back to the accounts to accurately reflect the management expense.
- (s) Foreign currency transactions are made using the WM/Reuters exchange rate in the following circumstances:
- Purchase and sales: the foreign exchange rate applicable on the day prior to the trade date is used.
 - Stock holdings: all holdings valuations are made using the WM/Reuters close of previous business day.
 - Dividend receipts: the rate applicable on the day prior to the date the dividend received is used.
- (t) Commitments - Where capital committed to investments is not fully drawn down at the end of the financial year the outstanding commitment is not included in the net asset statement but is referred to in the notes to the accounts; please see note 11.
- (u) Financial Instruments –
- (i) Financial Liabilities are recognised on the Net Asset Statement when the Fund becomes a party to the contractual provisions of a financial instrument and are initially measured at fair value and are carried at their amortised cost.
- (ii) Financial Assets are recognised on the Net Asset Statement when the Fund becomes a party to the contractual provisions of a financial instrument. Financial Assets are classified into two types:
- Loans and receivables – assets that have fixed or determinable payments but are not quoted in an active market; and
 - Fair value through profit or loss – assets that are held for trading.
- (v) Critical judgements in applying accounting policies and assumptions made about the future and other major sources of estimation uncertainty – The statement of accounts contain critical judgements in applying accounting policies and estimated figures based on assumptions made by the authority about the future or that are otherwise uncertain. There are two areas in the accounts where critical judgements are applied which are materially significant to the accounts:
- Actuarial present value of promised retirement benefits – the figure of net liability to pay pensions is based on a significant number of assumptions including the discount rate, mortality rates and expected returns on fund assets. The Pension Fund's qualified actuary calculates this figure to ensure the risk of misstatement is minimised.
 - Private Equity valuations – the value of the Fund's private equity holdings is calculated by the General Partners of the fund on the basis of their Valuation Policy, which follows best practice in the industry. However this is based upon a 31 December audited accounts valuation adjusted for estimated distributions and capital calls up to 31 March. Other mandates such as the diversified growth and multi-asset credit funds also adopt their own valuation policies when other quoted or comparable inputs are unavailable..
- (w) Additional Voluntary Contributions ("AVCs")

Members of the Fund are able to make AVCs in addition to their normal contributions. The related assets are invested separately from the main fund, and In accordance with the Local Government Pension Scheme (Management and Investment of Funds) Regulations 2016, are not accounted for within the financial statements. If on retirement members opt to enhance their Scheme benefits using their AVC funds, the amounts returned to the Scheme by the AVC providers are disclosed as transfers-in. Further details about the AVC arrangements are disclosed in note 13 to the financial statements.

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FUND ACCOUNT FOR THE YEAR ENDED 31 MARCH 2018

The fund account shows the surplus or deficit on the fund for the year.

	2017/18 £000	2016/17 £000	See note
<u>DEALINGS WITH MEMBERS, EMPLOYERS AND OTHERS DIRECTLY INVOLVED WITH THE SCHEME</u>			
Contributions Receivable:			
- from Employers	(30,417)	(33,411)	1
- from Employees	(9,211)	(9,099)	1
- Reimbursement for Early Retirement	(609)	(955)	
Transfer Values In	(6,136)	(2,123)	
Other Income	(30)	(72)	
Sub-Total: Income	(46,403)	(45,660)	
Benefits Payable:			
- Pensions	40,420	39,096	2
- Lump Sums: Retirement allowances	6,779	8,611	2
- Lump Sums: Death grants	1,039	1,720	2
Payments to and on account of leavers:			
- Refunds of Contributions	140	86	
- Transfer Values Out	4,438	4,331	
Sub-Total: Expenses	52,816	53,844	
Sub-Total: Net (Additions)/ Withdrawals from dealings with members	6,413	8,184	
Management Expenses	1,929	2,143	3
Sub-Total: Net (Additions)/ Withdrawals including fund management expenses	8,342	10,327	
<u>RETURNS ON INVESTMENTS</u>			
Investment Income	(6,594)	(6,670)	4
Change in market value of investments (Realised & Unrealised)	(30,897)	(236,975)	5a
Taxes on Income	192	178	
Total Net Returns on Investments	(37,299)	(243,467)	
NET (INCREASE) / DECREASE IN THE FUND DURING YEAR	(28,957)	(233,140)	
OPENING NET ASSETS OF THE FUND	(1,274,569)	(1,041,429)	
CLOSING NET ASSETS OF THE FUND	(1,303,526)	(1,274,569)	

PENSION FUND

NET ASSETS STATEMENT AS AT 31 MARCH 2018

The Net Assets Statement shows the market value of the investments and other assets held by the Pension Fund as at 31 March 2018.

	31/03/18 £000	31/03/17 £000	See note
INVESTMENT ASSETS			
Equities			
United Kingdom	11,487	11,777	5
Global	0	13,805	5
	11,487	25,582	
Managed Funds			
Property	108,401	98,174	5
Equities	710,103	830,606	5
Fixed Interest	210,101	206,232	5
Index Linked	42,600	41,599	5
Other Assets	135,223	32,862	5
	1,206,428	1,209,473	
Cash Held with Custodian	86,154	36,517	9
Derivative Contracts			
Assets	1,069	800	7
Liabilities	(1,069)	(800)	7
Other Investment Balances			
Debtors - Investment Transactions	3,101	3,118	8
Creditors - Investment Transactions	(3,085)	(3,453)	8
TOTAL INVESTMENTS	1,304,085	1,271,237	
NET CURRENT ASSETS AND LIABILITIES			
Debtors	287	701	8
Creditors	(1,689)	(475)	8
Cash in Hand	843	3,107	9
TOTAL NET ASSETS	1,303,526	1,274,570	

The financial statements of the Fund do not take account of the liability to pay pensions or benefits after 31 March 2018. This liability is included within the Authority's balance sheet.

The value for derivative contracts in 2016/17 has been restated but does not impact the total net assets value for 2016/17. It was previously shown as £0 for both assets and liabilities.

PENSION FUND

NOTES TO THE PENSION FUND ACCOUNTS

1. CONTRIBUTIONS RECEIVED

	2017/18 £000	2016/17 £000
Employer Contributions		
Administering Authority	(24,771)	(27,346)
Scheduled Bodies	(4,913)	(5,209)
Admitted Bodies	(733)	(856)
	(30,417)	(33,411)
Employee Contributions		
Administering Authority	(7,281)	(7,265)
Scheduled Bodies	(1,687)	(1,607)
Admitted Bodies	(243)	(227)
	(9,211)	(9,099)

2. BENEFITS PAID

<u>By Category</u>	2017/18 £000	2016/17 £000
Pensions	40,420	39,096
Commutation and Lump Sum Retirement Benefits	6,779	8,611
Lump Sum Death Grants	1,039	1,720
	48,238	49,427

<u>By Authority</u>	2017/18 £000	2016/17 £000
Administering Authority	44,572	45,788
Scheduled Bodies	2,748	2,912
Admitted Bodies	918	727
	48,238	49,427

3. MANAGEMENT EXPENSES

	2017/18 £000	2016/17 £000
Administration Expenses	696	705
Oversight and Governance Expenses	257	433
<u>Investment Management Expenses:</u>		
- Transaction Costs	12	0
- Management Fees	917	978
- Performance Fees	0	0
- Custody Fees	47	27
	1,929	2,143

The reduction in Oversight and Governance expenses in 2017/18 is in part due to the mis-categorisation of Management Fees to Oversight and Governance expenses in 2016/17 of approximately £90k. Actuarial and advisory fees were also approximately £41k higher in 2016/17 due to the triennial valuation.

PENSION FUND

4. INVESTMENT INCOME

	2017/18 £000	2016/17 £000
Cash	(90)	(100)
Equities	(216)	(467)
Fixed Interest	(430)	(955)
Index Linked	(88)	(208)
Managed Funds (incl Property)	(5,416)	(4,561)
Securities Lending	(5)	(11)
Other	(349)	(368)
	(6,594)	(6,670)

5 INVESTMENT ANALYSIS

Individual Investment assets with a market value exceeding 5% of the total fund value are:

Asset	Manager	31 March 2018	
		£000	%
UBS Asset Management Life World Equity Tracker	UBS	221,735	17.0
Aquila Life US Equity Index Fund	Blackrock	145,507	11.2
Blackrock Pensions Aquila Life UK Equity Index Fund	Blackrock	90,457	6.9
UBS Asset Management Life UK Equity Tracker A Nav	UBS	89,239	6.8

PENSION FUND

Investments exceeding 5% within each class of security are as follows:

UK Equities			
Harbourvest GE PE Shares	Harbourvest	11,530	100.0
Property			
Schroder Unit TST UK Real Estate	Schroders	15,677	14.4
Legal and General Managed Property Fund	Schroders	14,071	12.9
Hermes Property Unit	Schroders	10,658	9.8
Blackrock UK FD	Schroders	10,012	9.2
Real Income Fund	Schroders	9,720	8.9
Metro Ppty Unit Trust	Schroders	9,221	8.5
Mayfair Cap Ppty (MCPUT)	Schroders	8,725	8.0
Multi-Let INDL Property Unit Trust	Schroders	6,887	6.3
IPIF Feeder Unit Trust Fund	Schroders	6,372	5.9
Standard Life Pooled Property Fund	Schroders	6,240	5.7
Metro Ppty Unit Trust	Schroders		
Managed Equities			
UBS Asset Management Life World Equity Tracker	UBS	221,735	31.6
Aquila Life US Equity Index Fund	Blackrock	145,507	20.8
BlackRock Pensions Aquila Life UK Equity Index	Blackrock	90,457	12.9
UBS Asset Management Life UK Equity Tracker A Nav	UBS	89,239	12.7
Aquila Life European Equity Index Fund	Blackrock	41,227	5.9
BlackRock AM (IE) ISHS Emerging Markets Index	Blackrock	35,961	5.1
Fixed Interest			
Blackrock Pensions Aquila Over 15 Years UK	Blackrock	43,384	20.6
Blackrock AM (IE) UK Credit	Blackrock	42,005	19.9
UBS Asset Mgmt STG Corp	UBS	42,090	20.0
Aquila Life Over 5 yrs Index Fund	Blackrock	40,223	19.1
UBS GBL Asset Life UK Over 15 Year Gilt	UBS	43,123	20.5
Index Linked			
UBS Asset Mgmt Life Over 5 Year Index Linked Gilt Tracker	UBS	42,808	100.0
Alternatives			
Invesco Fund Managers Perpetual Targeted Returns	Invesco	77,240	57.1
Pemberton Euro Debt Investments Jersey II	Pemberton	27,717	20.5
HIPEP VII (AIF) Partnership Fund LP	Harbourvest	11,309	8.4

PENSION FUND

An analysis of investment movements is set out below:

5. INVESTMENT ANALYSIS

INVESTMENT MOVEMENTS 2017/18	Value at 31 March 2017 £000	Purchases at Cost £000	Sales Proceeds £000	Change in Capital Value £000	Change in Market Value £000	Value at 31 March 2018 £000
UK Equities	11,777	0	0	0	(290)	11,487
Global Equities	13,805	4	(13,411)	8	(406)	0
Managed Equities	830,606	243,467	(385,544)	0	21,574	710,103
Property	98,174	9,723	(5,488)	(8)	6,000	108,401
Fixed Interest Securities	206,232	6,451	(4,409)	279	1,548	210,101
Index Linked Securities	41,599	1,600	(910)	73	238	42,600
Other Assets*	32,862	111,208	(11,362)	(74)	2,589	135,223
Derivatives	0	0	0	0	0	0
	1,235,055	372,453	(421,124)	278	31,253	1,217,915
Cash Deposits	36,517				(365)	86,154
Other Investment Balances	(336)				9	16
Total Investments	1,271,236				30,897	1,304,085

* Includes Venture Capital, Multi-Asset Credit, Private Equity and Diversified Growth funds.

The Pension Fund's fixed interest and index linked bond investments are held with UBS and Blackrock in the form of pooled funds. The asset denoted 'Index Linked Securities' above is comprised wholly of UK Government index linked gilts. The 'Fixed Interest Securities' comprise various government and corporate bonds.

Apart from global equities, overseas managed equities and bonds, the other overseas investments held by the Fund fall under the 'Other Assets' category comprising of private equity with a value of £29.4m and multi-asset credit/private debt, with a value of £27.7m

The total value of unquoted securities held by the fund as at 31 March 2018 was £884m, this includes equities, bonds, private equity, diversified growth and multi-asset credit funds.

The total value of quoted securities held by the fund as at 31 March 2018 was £217m, this includes equities and bonds.

The Fund has investment assets that are classed as pooled investment vehicles. The Fund holds unitised/unit-linked insurance policies valued at £877m and unit trusts valued at £187m, of which £109m relates to pooled property investments. The Fund also holds assets with value £28m as a Limited Partner in a compartment of a common limited partnership.

PENSION FUND

As at 31 March 2017:

INVESTMENT MOVEMENTS 2016/17	Value at 31 March 2016 £000	Purchases at Cost £000	Sales Proceeds £000	Change in Capital Value £000	Change in Market Value £000	Value at 31 March 2017 £000
UK Equities	8,735	0	0	0	3,042	11,777
Global Equities	10,714	2	0	(57)	3,146	13,805
Managed Equities	656,010	11,567	(33,820)	0	196,849	830,606
Property	96,263	11,400	(9,371)	(83)	(35)	98,174
Fixed Interest Securities	162,329	26,746	(2,985)	0	20,142	206,232
Index Linked Securities	33,177	3,716	(2,341)	0	7,047	41,599
Other *	33,077	5,278	(11,266)	(27)	5,800	32,862
Derivatives	0	0	0	0	0	0
	1,000,305	58,709	(59,783)	(167)	235,991	1,235,055
Cash Deposits	40,667				984	36,517
Other Investment Balances	389					(336)
Total Investments	1,041,361				236,975	1,271,236

* Includes Venture Capital, Credit Mandates and Private Equity.

5A. FINANCIAL INSTRUMENTS

The accounting policies describe how the different asset classes of financial instruments are measured, and how income and expenses are recognised. The following table analyses the carrying amounts of financial assets and liabilities by category. No financial assets were reclassified during the accounting period. All assets are held at fair value, therefore there is no difference between fair value and carrying value.

PENSION FUND

	31-Mar-18			31-Mar-17		
	Fair Value through Profit & Loss	Loans and Receivables	Financial Liabilities at Amortised Cost	Fair Value through Profit & Loss	Loans and Receivables	Financial Liabilities at Amortised Cost
	£000	£000	£000	£000	£000	£000
Financial Assets						
Equities	11,487			25,582		
Managed Funds:						
Property	108,401			98,174		
Managed Equity	710,103			830,606		
Fixed Interest	210,101			206,232		
Index Linked	42,600			41,599		
Other Alternative Assets	135,223			32,862		
Derivative contracts	1,069					
Cash deposits		86,154			36,517	
Pending Trades		361			2,700	
Dividends & Income		2,740			418	
Contributions Due		189			645	
Cash Balances		843			3,107	
Other Current Assets		98			57	
Total Financial Assets	1,218,984	90,385	0	1,235,055	43,444	0
Financial Liabilities						
Derivative Contracts			(1,069)			
Pending Trades			(3,085)			(3,453)
Unpaid benefits						
Other Current Liabilities			(1,689)			(475)
Total Financial Liabilities	0	0	(5,843)	0	0	(3,928)
Net Financial Assets	1,218,984	90,385	(5,843)	1,235,055	43,444	(3,928)

Net Gains and Losses on Financial Instruments

The following table shows net gains on financial instruments:

	31/03/18 £000	31/03/17 £000
Financial Assets		
Fair Value through Profit and Loss	30,897	236,975
Loans and Receivables	0	0
Financial Liabilities		
Fair Value through Profit and Loss	0	0
	30,897	236,975

Valuation of Financial Instruments carried at Fair Value

The following table provides an analysis of the financial assets and liabilities of the Fund grouped into three levels, according to the quality and reliability of information used to determine fair values.

PENSION FUND

Level 1 - consists of assets where the fair values are derived from unadjusted quoted prices in active markets for identical assets and liabilities (e.g. quoted equities, quoted fixed securities, quoted index linked securities and unit trusts).

Level 2 - consists of assets where quoted market prices are not available (e.g. where an instrument is traded in a market that is not considered to be active, or where valuation techniques are used to determine fair value).

Level 3 - consists of assets where at least one input that could have a significant effect on the instrument's valuation is not based on observable market data.

Values as at 31 March 2018

	Quoted Market Price Level 1 £000	Using Observable Inputs Level 2 £000	With Significant Unobservable Inputs Level 3 £000	Total at 31/03/18 £000
Financial Assets				
Financial Assets at Fair Value through Profit and Loss	11,487	1,176,161	30,267	1,217,915
Loans and Receivables	90,384	0	0	90,384
	101,872	1,176,161	30,267	1,308,300
Financial Liabilities				
Fair Value through Profit and Loss	0	0	0	0
Financial Liabilities at Amortised Cost	(4,774)	0	0	(4,774)
	(4,774)	0	0	(4,774)
Net Financial Assets	97,098	1,176,161	30,267	1,303,526

Values as at 31st March 2017

	Quoted Market Price Level 1 £000	Using Observable Inputs Level 2 £000	With Significant Unobservable Inputs Level 3 £000	Total at 31/03/17 £000
Financial Assets				
Financial Assets at Fair Value through Profit and Loss	25,582	1,176,611	32,862	1,235,055
Loans and Receivables	43,443	0	0	43,443
	69,025	1,176,611	32,862	1,278,498
Financial Liabilities				
Fair Value through Profit and Loss	0	0	0	0
Financial Liabilities at Amortised Cost	(3,929)	0	0	(3,929)
	(3,929)	0	0	(3,929)
Net Financial Assets	65,096	1,176,611	32,862	1,274,569

PENSION FUND

5B. FINANCIAL RISK MANAGEMENT

The Fund's primary long term risk is that the Fund's assets will fall short of its liabilities (i.e. promised benefits payable to members). As an investment fund, the Lewisham Pension Fund's objective is to generate positive investment returns for an accepted level of risk. Therefore the Fund holds a mix of financial instruments such as securities (equities, bonds), collective investment schemes (pooled funds), and cash equivalents. In addition, debtors and creditors arise as a result of its operations. The value of these financial instruments is reflected in the financial statements at their fair value.

Responsibility for the Fund's risk management strategy rests with the Council's Pension Investment Committee (PIC). Risk management policies are established to identify and analyse the risks faced by the Council's pension operations. The main risks from the Fund's holding of financial instruments are market risk, credit risk, and liquidity risk. These policies are reviewed regularly to reflect change in activity and in market conditions.

The Committee regularly monitors each investment manager, and its investment consultant (Hymans Robertson) advises on the nature of the investments made and associated risks.

The Fund's investments are managed on behalf of the Fund by the appointed investment managers. Each investment manager is required to invest the assets managed by them in accordance with the terms of their investment guidelines or pooled fund prospectus.

The Committee has determined that the current largely passive investment management structure is appropriate and is in accordance with its latest investment strategy. In 2017/18 the Fund reduced its equity exposure by approximately 12% of the Fund's total value, committing the sales proceeds to new mandates in diversified growth and multi-asset credit, in line with the Funding Strategy and Investment Strategy Statements approved by PIC towards the end of 2016/17.

The Fund's custodian is Northern Trust, who manage investments and report on them on behalf of the Fund. As the Fund adopts a long term investment strategy, the high level strategic risks described below will not alter significantly during any one year unless there are significant strategic or tactical changes made to the portfolio.

i) Market Risk

Market risk represents the risk that fair value of a financial instrument will fluctuate because of changes in market prices, interest rates or currencies. The Fund is exposed, through its investments in equities, bonds and investment funds, to all these market risks. The aim of the investment strategy is to manage and control exposure to market risk within acceptable parameters while optimising the return from the investment portfolio. In general, market risk is managed through the diversification of the investments held by asset class, investment mandate guidelines and investment managers. The risk arising from exposure to specific markets is limited by the strategic asset allocation, which is regularly monitored by the PIC.

a) Other Price Risk – Market

The risk that the value of a financial instrument will fluctuate as a result of factors other than interest rate or foreign currency movements, whether those changes are caused by factors specific to the individual instrument, its issuer or factors affecting the market in general. Market price risk arises from uncertainty about the future value of the financial instruments that the Fund holds. All investments present a risk of loss of capital, the maximum risk being determined by the fair value of the financial instruments. The investment managers mitigate this risk through diversification in line with their own investment strategies and mandate guidelines.

b) Other Price Risk – Sensitivity analysis

The Council and its investment advisors also undertake appropriate monitoring of market conditions and benchmark analysis. The Fund has a long term view on expected investment returns which smoothes out short term price volatility.

Following analysis of historical data and expected investment return movement during the financial year, in consultation with the Fund's advisors, the Council has determined that the following movements in market price risk are reasonably possible for the 2017/18 reporting period.

PENSION FUND

Asset Type	Potential Market Movement +/- (% p.a.)
UK Equities	9.6
Global Equities	10.1
Bonds and Index Linked	9.3
Alternatives	4.6
Property	2.9
Cash	0.8

The potential volatilities are broadly consistent with a one standard deviation movement in the change in value of the assets over the latest three years. This can then be applied to the period end asset mix as follows:

Asset Type	Final Market Value as at 31 March 2018 £000	Percentage Change	Value on Increase £000	Value on Decrease £000
UK Equities	408,655	9.6	447,753	369,557
Global Equities	312,935	10.1	344,577	281,293
Bonds and Index Linked	252,700	9.3	276,156	229,244
Other Assets	135,223	4.6	141,396	129,050
Property	108,401	2.9	111,498	105,304
Cash	86,154	0.8	86,875	85,433
Total Assets*	1,304,068	**7.0	**1,395,092	**1,213,044

* This figure excludes derivatives and other investment balances.

** The % change and value change for Total Assets includes the impact of correlation across asset classes

c) Interest Rate Risk is the risk the Pension Fund is exposed to changes in interest rates and relates to its holdings in bonds and cash. The risk is mitigated by the Fund holding minimum cash balances and a diversified portfolio.

d) Currency Risk is the risk to which the Pension Fund is exposed to fluctuations in foreign currency exchange rates. The Fund is exposed to currency risk on financial instruments that are denominated in any currency other than the functional currency of the fund (£GBP). The fund was exposed to the following significant foreign currency levels (i.e. £2m and over) as at the 31 March 2018 with the previous year in brackets:

Euro	£16.9m	(£15.8m)
US Dollars	£88.4m	(£77.5m)

The remaining exposures arise from much smaller investments relating to other currencies.

e) Currency risk – sensitivity analysis

The Fund's currency rate risk is routinely monitored by the Council and its investment advisors. In practice, this is achieved by the use of futures and forward foreign exchange contracts, which entitle and oblige the seller and holder to exchange assets or currency on a future date at a predetermined price or rate. The former are tradable on exchanges and the latter are "over the counter" agreements, which neither the purchaser nor the seller may transfer. There is no cost on entering into these contracts but the market value is established as the gain or loss that would arise at the settlement date from entering into an equal and opposite contract at the reporting date. As at 31 March 2018 there were pending foreign exchange purchases of £1.1m and corresponding of sales £1.1m. Following analysis of historical data in consultation with the Fund's advisors, the Council considers the likely volatility associated with foreign exchange rate movements to be 9.2%. This volatility is applied to the Fund's overseas assets as follows:

PENSION FUND

Asset Type	Asset Value at 31 March 18 £000	Change %	Value on Increase £000	Value on Decrease £000
Overseas Equities	312,935	9.2	341,735	284,135
Overseas Fixed Income	84,025	9.2	91,758	76,292
Other Alternatives	57,094	9.2	62,348	51,840
Total	454,054	9.2	495,841	412,267

ii) Credit Risk

Credit risk represents the risk that the counterparty to a financial instrument will fail to meet an obligation and cause the Fund to incur a financial loss. This is often referred to as counterparty risk. The market values of investments generally reflect an assessment of credit risk in their pricing and consequently the risk of loss is implicitly provided for in the carrying value of the Fund's financial assets and liabilities. The Fund is exposed to credit risk through its underlying investments (including cash balances) and the transactions it undertakes to manage its investments. The careful selection and monitoring of counterparties – including; brokers, custodian and investment managers - seeks to minimise the credit risk that may occur through the failure to settle transactions in a timely manner.

The Fund is also exposed to credit risk through Securities Lending. The Securities Lending (SL) programme is run by the Fund's custodian, Northern Trust. Northern Trust assign four different risk management oversight committees to control counterparty risk, collateral risk and the overall securities lending programme. The minimum level of collateral for securities on loan is 102%. However, more collateral may be required depending on the type of transaction. To further mitigate risks, the collateral held on behalf of the Pension Fund is ring fenced from Northern Trust. Securities lending is capped by investment regulations and statutory limits are in place to ensure no more than 25% of eligible assets can be on loan at any one time. The Fund's exposure through the SL programme is now reduced as the Fund is now passively managed and SL activity has greatly reduced.

iii) Liquidity Risk

Liquidity risk is the risk that the Pension Fund will have difficulties in paying its financial obligations as they fall due. For example; the benefits payable costs and capital commitments. The Fund therefore takes steps to ensure that it has adequate cash resources to meet its commitments. The Fund holds a large proportion of assets in instruments which can be liquidated at short notice, normally three working days. As at the 31 March 2018 these assets totalled approximately £0.974m, comprising of bonds and equities, with a further £86.2m held in cash by the custodian on behalf of the Fund and fund managers.

6. PRIOR YEAR ADJUSTMENT

No prior year adjustments have been made to these accounts.

7. DERIVATIVE CONTRACTS

As at 31 March 2018 there were pending forward foreign exchange purchases of £1.1m and sales of £1.1m, with an unrealised loss of £62. The net gains and losses in the table below relate to foreign exchange forward contracts.

Asset Type	2017/18 £'000	2016/17 £'000
Foreign Exchange Gains	2	0
Foreign Exchange Losses	(4)	0
Total Realised Gains/(Losses)	(2)	0

PENSION FUND

8. DEBTORS & CREDITORS

These comprise the following amounts:

Investment Transactions**Debtors**

	31/03/18 £000	31/03/17 £000
Equity Dividends / Income from Managed Funds	0	31
Interest and Other Income	2,740	387
Pending Trades	361	2,700
	3,101	3,118

Creditors

	31/03/18 £000	31/03/17 £000
Pending Trades	(3,085)	(3,453)
	(3,085)	(3,453)

Non-Investment Transactions**Debtors**

	31/03/18 £000	31/03/17 £000
Contributions Due from Admitted/ Scheduled Employers/ Employees	189	645
Interest and Other Income	0	21
LB Lewisham	64	35
Tax Refunds	34	0
	287	701

Creditors

	31/03/18 £000	31/03/17 £000
Fund Manager and Custody Fees	(283)	(251)
Consultancy/ Advisory Fees	(56)	(48)
LB Lewisham	(1,350)	(176)
	(1,689)	(475)

9. CASH AND BANK**Cash Held With Custodian**

The Northern Trust Company is the Fund's global custodian and the cash is held to meet the cash flow requirements of the Fund and its managers. The total cash held as at 31 March 2018 was £86.2m (£36.5m as at 31 March 2017). Approximately £14.0m from the 2015/16 disinvestment in Investec was held by the custodian in a cash fund which is drawn down to meet cashflow requirements during the year, whilst £50.7m representing proceeds from equity sales as part of the Fund's rebalancing was held in a separate cash fund to meet commitments to the Fund's multi-asset credit mandate. £10.1m of the cash held was from HarbourVest, £8.1m from M&G, £3.0m from Schroders and approximately £138k was being held on behalf of the other managers.

PENSION FUND

Pension Fund Bank Account

The Lewisham cash balance represents uninvested cash held in the Pension Fund bank account as at 31 March 2018.

10. POST YEAR END EVENTS

The Fund executed the first stage of a rebalancing exercise in 2017/18, consistent with the Funding Strategy and Investment Strategy Statement amendments following the triennial valuation results, part of which was to procure two new fund managers with multi-asset credit mandates. As at 31 March 2018 the Fund had not yet been admitted to one of these funds, the Partners Group Multi Asset Credit 2017 (IV) GBP fund. In April 2018 Lewisham was successfully onboarded into the fund, with a commitment to invest £40m; the first capital call was issued and payment made of £20m on 23 April 2018.

The Fund also procured a new infrastructure mandate in March 2018 with J.P. Morgan, but as at 31 March 18 had not been admitted to the fund. Lewisham's commitment to the infrastructure fund will be approximately £80m, with a first capital call likely mid-year.

Following the local elections of May 2018, a new Pensions Investment Committee will convene for its first meeting on 28 June 2018. The Committee comprises four previously sitting Councillors, including the re-elected Chair, and four new Councillors with varying degrees of pensions knowledge and experience. The Fund's strategic direction, in line with its Funding and Investment Strategies, will be reassessed by Members in the coming months in conjunction with the results of the next triennial valuation to be carried out as at March 2019.

11. COMMITMENTS

The Pension Fund was committed to the following capital contributions as at the 31 March 2018:

Fund Manager	Fund	Amount (‘000)	Translated (£’000)
HarbourVest	Harbourvest Partners VIII - Cayman Venture Fund L.P	\$190	135
HarbourVest	Harbourvest Partners VIII - Cayman Buyout Fund L.P	\$833	593
HarbourVest	HarbourVest Partners X AIF L.P.	\$24,158	17,215
HarbourVest	HIPEP VII (AIF) Partnership Fund L.P.	\$14,550	10,368
HarbourVest	Harbourvest International Private Equity Partners V - Cayman Partnership Fund L.P	€ 700	613
HarbourVest	Harbourvest International Private Equity Partners V - Cayman Direct Fund L.P	€ 180	158
Pemberton	European Debt Investments Jersey II LP	£12,226	12,226
	Total		41,308

12. RELATED PARTY TRANSACTIONS

There have been no material transactions with related parties in the financial year. There were no provisions for doubtful debt and amounts written off in the period.

Eight Councillors sit on the Pensions Investment Committee which oversees the Fund. At each meeting of the Pensions Investment Committee, Councillors are required to make declarations of interest which are recorded.

During the year the following declarations were made:

- Councillor Simon Hooks declared he now works in the life insurance and pensions field.

Four members and an independent chair make up the membership of the Pensions Board, which assists the administering authority in adhering to the Regulations with regards to its administration and governance of the scheme. At each meeting of the Board, members are required to make declarations of interest which are recorded.

During the year no declarations of interest were made apart from the members being participants in the scheme, although this is a requirement of their Board membership.

PENSION FUND

No other trustees or Council chief officers with direct responsibility for pension fund issues made any declarable transactions with the Pension Fund in the period to 31 March 2018.

The Council, the administering body, had dealings with the Fund as follows:

- Recharges from the Council for the in-house administration costs borne by the scheme were transacted for £661k (included in Administration Expenses in Note 3). Some cash transactions relating to pension activities are currently effected through the Council's bank account and consequently pension fund cash balances are held by the Council from time to time and vice versa.
- The salary of the Executive Director for Resources and Regeneration for 2017/18 was £189,977 including employer pension contributions of £34,894. This total also includes an allowance for acting as Chief Executive following the resignation of the previous post holder.

13. ADDITIONAL VOLUNTARY CONTRIBUTIONS (AVCs)

Contributing members have the right to make AVCs to enhance their pension. There are currently 40 'open' AVC contracts for LGPS members (i.e. excluding members with AVC contracts who have left Lewisham and now have preserved benefits). Some of these 'open contracts' will be for members who have paid AVCs in the past but who have suspended payments to the scheme for the time being.

The fund has two AVC providers: Clerical Medical and Equitable Life. The value of AVC investments is shown below. The contributions are held by the providers and do not form part of the Lewisham fund's assets in accordance with Regulation 4(1)(b) of the Local Government Pension Scheme (Management and Investment of Funds) Regulations 2016.

	2017/18			2016/17		
	Equitable Life £000	Clerical Medical £000	Total £000	Equitable Life £000	Clerical Medical £000	Total £000
Value at the Beginning of Year	461	848	1,309	442	792	1,234
Contributions and Transfers Received	4	173	177	4	112	116
Investment Return	17	10	27	18	80	98
Paid Out	(48)	(155)	(203)	(3)	(136)	(139)
Value at the End of the Year	434	876	1,310	461	848	1,309

14. SCHEDULED BODIES

The following are scheduled bodies to the Fund as at 31 March 2018, arranged in descending order by the value of their contributions in 2016/17:

Lewisham Homes
Haberdashers' Aske's Knights Academy
Christ The King Sixth Form College
St Matthew Academy
Tidemill Academy
Griffin Schools Trust

15. ADMITTED BODIES

The following are admitted bodies to the Fund as at 31 March 2018, arranged in descending order by the value of their contributions in 2016/17:

Phoenix
Youth First LTD
Phoenix Agency Services
Chartwells Compass

PENSION FUND

Skanska
Lewisham Music
3 C's Support
One Housing
NSL (formerly known as National Car Parks Ltd)
Wide Horizons
Change Grow Live
Nviro
Fusions Leisure Management
Quality Heating
Housing 21
Pre-School Learning Alliance
Blenheim CDP (Ceased November 2017)
Excalibur (Ceased March 2017)
Tower Services
Chequers Contract Services – Lee Manor
Lewisham Nexus Services (Ceased April 2017)

16. STOCK LENDING

The Statement of Investment Principles and Investment Strategy Statement permit the Fund to enter into stock lending whereby the Fund lends other bodies stocks in return for a fee and collateral whilst on loan. Equities and fixed income assets held in segregated accounts in custody may be lent.

The economic benefits of ownership are retained when securities are on loan. The Fund has its full entitlements at all times to any income due, or rights on its securities on the anticipated date of the entitlement so that no economic benefits are foregone as a result of securities lending activity.

Northern Trust is responsible for collecting dividend and interest income on loaned securities from borrowers. The right to vote moves with the securities.

As at the 31 March 2018 the value of aggregate stock on loan was £0m (£9.3m as at 31 March 2017). As part of the Fund's rebalancing in year and the sale of equities to finance investments in new mandates, assets in segregated accounts which participated in stock lending arrangements were sold or traded into pooled life funds.

Collateral

The collateral held as security on loans cannot be sold or repledged in the absence of default by the borrower. The Council entered into stock lending transactions during the financial year earning £3k net of direct expenses (compared to £8k in 2016/17). The value of collateral held as at 31 March 2017 was £0m (£9.8m as at 31 March 2017).

17. MEMBERSHIP

	Active Members		Deferred Beneficiaries		Retired Members	
	2017/18	2016/17	2017/18	2016/17	2017/18	2016/17
Administering Authority	5,331	5,814	8,701	9,679	7,184	7,098
Scheduled Bodies	1,180	916	1,166	825	339	243
Admitted Bodies	126	137	122	117	99	90
	6,637	6,867	9,989	10,621	7,622	7,431

18. AUTHORISATION

These accounts were approved by Council on XXth July 2018

ANNUAL GOVERNANCE STATEMENT

To Follow

Lewisham

Annual Governance Statement

2017/18

What is corporate governance?

The Council is responsible for ensuring that its business is conducted in accordance with the law and proper standards; and for having a governance framework that comprises of the culture, values, systems and processes by which this is achieved. It must make sure that public money is safeguarded, properly accounted for and used economically, efficiently and effectively to meet its strategic objectives.

It also has a duty, through the establishment of internal control measures, to manage risk to a reasonable level by identifying, prioritising, evaluating and managing the risks to the achievement of its policies, aims and objectives. Finally, it has a duty to secure continuous improvement in the way in which its functions are exercised.

The Council has approved and adopted a Local Code of Corporate Governance, which is consistent with the principles of the CIPFA (the Chartered Institute of Public Finance and Accountancy) and SOLACE (the Society of Local Authority Chief Executives and Senior Managers) Framework Delivering Good Governance in Local Government. This statement explains how the authority has complied with the code and also how it meets the requirements of the Accounts and Audit (England) Regulations 2015 in relation to the publication of a statement on internal control.

“Corporate governance is about making sure that the Council is run properly. It is about ensuring the Council does the right things, at the right time and in the right way.”

How has this statement been prepared?

Every year a review of the effectiveness of the Council's governance framework is conducted by the Annual Governance Statement working party, which comprises policy, legal and audit officers with expertise in governance and internal control matters.

The group meets quarterly to collate and evaluate governance evidence and identify areas requiring action; and is responsible for analysing CIPFA/SOLACE guidance in relation to the development of this statement and ensuring that the statement is approved via the Council's key control mechanisms.

The governance review process includes:

- The consideration of the Annual Governance Statement Action Plan by the Council's Internal Control Board (ICB) during the year.
- The consideration of the Accounts, the Head of Corporate Resources (as Head of Internal Audit) Annual Report and the Annual Governance Statement by the Council's Audit Panel.

- A review of the Council's Local Code of Corporate Governance by the Standards Committee, with reference to CIPFA/Solace Guidance.
- Referral of the Annual Governance Statement to full Council with the Statement of Accounts.
- Sign off by the Chair of the Council and Chief Executive, once approved.
- This year, the Council's governance arrangements have broadly operated as designed, with some acting-up arrangements (principally in respect of the Head of Paid Service and Section 151 Officer roles) from November 2017 to May 2018 pending the recruitment and start of a new Chief Executive.

What are the Council's governance arrangements?

The Council's governance arrangements aim to foster effective leadership and high standards of behaviour; a culture based on openness and honesty; and an external focus on the needs of service users and the public. The diagram on page 5 shows the Council's external facing governance structure, as set out in the Council's constitution.

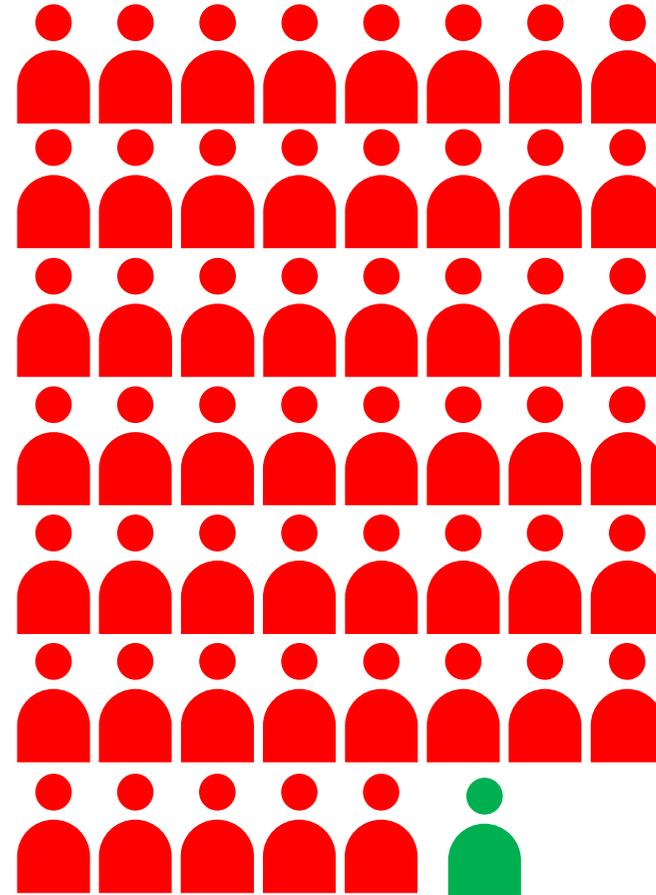
Lewisham's directly elected Mayor provides the Council with clear strategic direction and effective leadership but the Council also benefits from the perspectives and contributions of its 54 Councillors. The Council's constitution clearly defines the roles of councillors and officers, and this clarity contributes to effective working relationships across the Council. The Constitution Working Party, the Standards Committee and the Audit Panel monitor and challenge the governance arrangements and ensure their robustness.

The Council has worked closely with its partners, both strategic and operational. The Council has two statutory partnership boards: the Safer Lewisham Partnership which works to protect the community from crime and help people feel safer; and the Health and Wellbeing Board which works to identify local health challenges and lead on the activity necessary to address them.

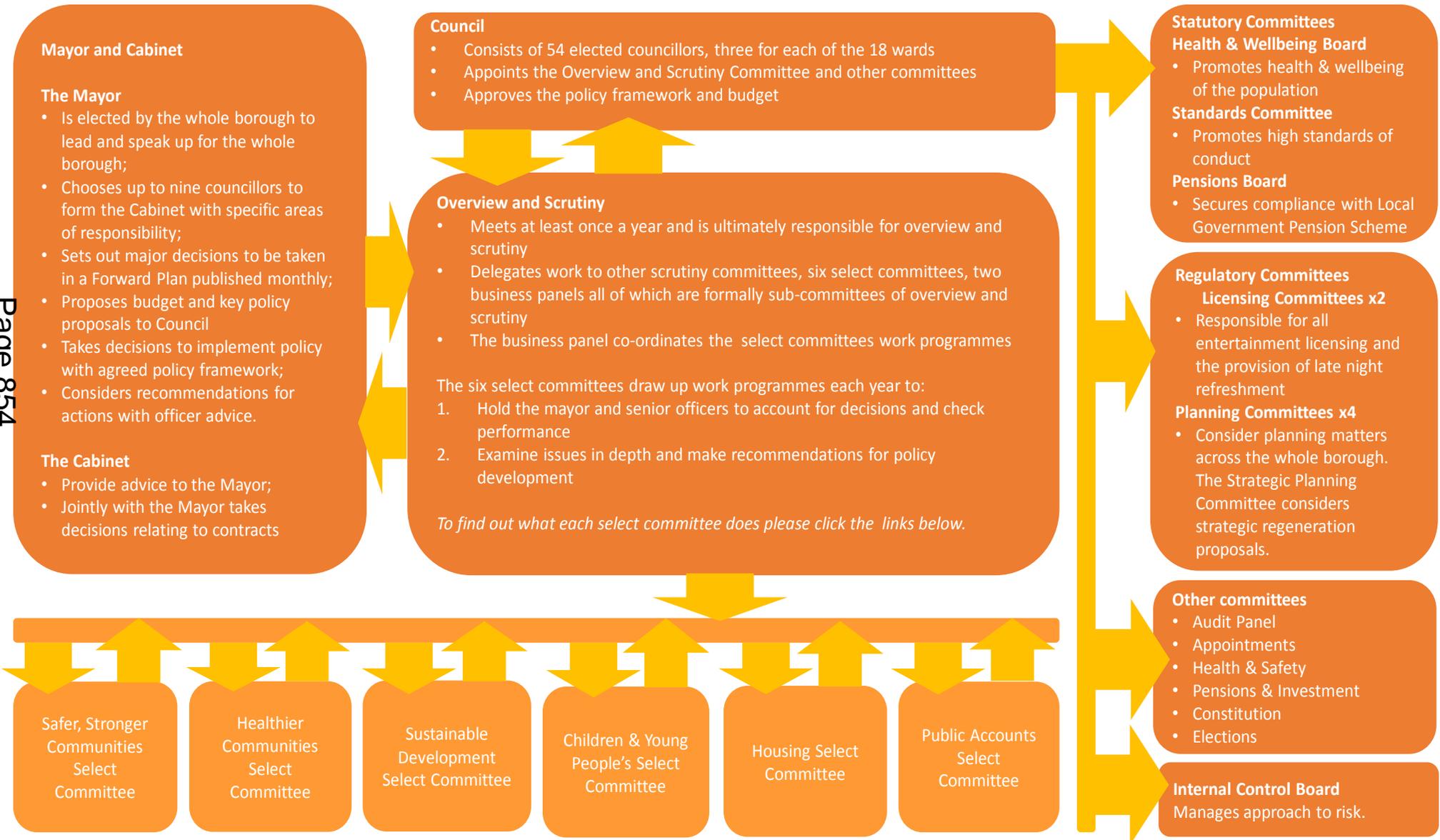
NB – from May 2018 following the local elections the Council is made up of a Labour Mayor and 54 Labour Councillors.



1 Mayor (Labour)



54 Councillors (53 Labour, 1 Green Party)



‘Together we will make Lewisham the best place in London to live, work and learn’

Page 5 of 5

Communicating and reviewing the Council’s vision

The Council has an overarching vision for the borough which is shared by its key partners and which was developed following extensive consultation with the community: **‘Together we will make Lewisham the best place in London to live, work and learn.** The Sustainable Community Strategy (SCS) 2008-20 outlines how all partners will work towards the vision by contributing to six key priorities:

Ambitious and achieving – where people are inspired and supported to fulfil their potential.

Safer where people feel safe and live free from crime, antisocial behaviour and abuse.

Empowered and responsible – where people are actively involved in their local area and contribute to supportive communities.

Clean, green and liveable – where people live in high quality housing and can care for and enjoy their environment.

Healthy, active and enjoyable – where people can actively participate in maintaining and improving their health and well-being.

Dynamic and prosperous – where people are part of vibrant communities and town centres, well connected to London and beyond.

The Council, in turn, has developed **ten corporate priorities** which articulate its contribution to the Sustainable Community Strategy priorities.

Delivering quality services

The Council seeks to use its resources efficiently and effectively to provide quality services which help deliver its vision for the borough. In the 2016/17 Annual Audit Letter Grant Thornton, the Council’s external auditors, commented that:

*“we are satisfied that in all significant respects the Council put in place proper arrangements to secure **economy, efficiency and effectiveness** in its use of resources for the year ending 31 March 2017”*

The Council’s performance is monitored via a monthly management report which tracks **23 performance indicators**, grouped according to the Council’s ten corporate priorities, and associated risks. The report uses Red exception reporting to focus attention on areas of poor performance or high risk and is a critical tool for supporting decisions across the Organisation. The report is seen by the Executive Management Team (EMT) monthly and the Public Accounts Select Committee and Mayor & Cabinet quarterly and is published on the Council website. The appropriateness of these measures is reviewed annually. The quality of services for users is also measured through satisfaction surveys and information from the complaints and management resolution processes. In addition, where areas for improvement are identified, the Council acts swiftly to address them. For example, following governance questions raised in respect of the New Bermondsey / Surrey Canal scheme in 2016 the Council instigated an independent inquiry. This reported in 2017 confirming that officers and members had acted correctly on the facts and in accordance with their governance obligations.

The *Lewisham Future Programme* has been established to spearhead how the Council can move forward in the face of reduced government funding. Proposals from a number of thematic and cross-cutting reviews were considered in 2017/18 and an ‘Invest to Save’ transformation programme was agreed by Council. This work is underpinned by **four core values**:

*We put service to the **public first***

*We respect **all people and all communities***

We invest in employees

*We are **open, honest and fair** in all we do*

Roles and responsibilities

The Council’s constitution sets out the roles and responsibilities of the Mayor, the Chair of Council, the Council as a whole, the Executive, Statutory Officers, Overview and Scrutiny committees, Standards committees and other

committees to help ensure that all decision making activity is lawful and transparent. Decisions are taken and scrutinised in accordance with the Council and Mayoral scheme of delegation, the procedure rules set out in the constitution and on the basis of professional officer advice, as part of an annual programme of regular meetings.

Embedding Roles and Responsibilities

The Local Code of Corporate Governance and the Codes of Conduct for Members and Officers, set out in the constitution, demand the highest standards of ethical behaviour. These are reviewed regularly and are communicated widely. The Standards Committee received its annual report on Member compliance with the Code of Conduct in November 2017 and considered that there was a high level of compliance. Training on the Member Code of Conduct was delivered to all Councillors in June 2014, following the local elections that year, as part of a comprehensive induction programme to enable Members to understand and access all appropriate support and development to undertake their role. A similar approach is proposed for all Councillors to follow the May 2018 elections.

***‘The Mayor** is elected to **lead** the Council. They serve for a period of **four years**. They must act in the **interests of the borough as a whole**. They are responsible for taking most*

*of the **main decisions**, and for **giving the power** to others to do so.’*

***‘Councillors** are elected for a term of **four years**. Councillors who are elected to represent local wards must both represent the people of the ward that elected them and act in the interest of the whole area. They are all expected to contribute to the **good governance** of the area and to encourage **community participation**. They must respond to their constituents’ enquiries **fairly and without prejudice**.’*

‘The constitution requires councillors to follow formal procedures when taking decisions to make sure that decisions are made transparently and openly’

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Decision making

The constitution requires councillors to follow formal procedures when taking decisions to make sure that decisions are made transparently and openly. This includes declaring if they have a personal interest in the matters under discussion and, if required, withdrawing from the room whilst the

decision is taken. Reports are produced in a standard format to ensure that report authors address all significant considerations such as the legal, financial and equalities implications of decisions. The minutes of every formal meeting are published on the Council website.

The constitution requires Executive decisions to be published within two working days of being taken and they may be **called-in** (referred to the Mayor for reconsideration) by the Overview and Scrutiny Business Panel and the Education Business Panel. Two matters were called in by the Overview and Scrutiny Business Panel in the 2016/17 period. The Council has a Constitution Working Party (CWP) to advise it on the operation of its constitutional arrangements but in practice, the procedure rules set out in the constitution are under constant review to reflect changing needs.

The constitution sets out which decisions are referred to Full Council. In 2017/18 the independent inquiry reported to Full Council having investigated matters related to the Council’s proposed compulsory purchase order of land at New Bermondsey/ Surrey Canal. The Council was found to have acted consistently and correctly.

Internal Audit

The role of internal audit is to provide an objective opinion on the internal control environment within the Council. Its work is set out in an annual internal audit plan that covers the activities where internal audit and management perceive there

are risks to achieving objectives. A number of audits take place each year to analyse relevant controls and following each audit an assurance statement indicating the level of assurance that management can place on the adequacy and effectiveness of the internal controls is produced. In 2016/17 81 assurance reviews were undertaken and the annual opinion of the Head of Internal Audit was:

*"I have considered all of the work undertaken and reported on by the Internal Audit Service, Anti-Fraud and Corruption Team and other sources of assurance available to the Council for the audit year 2016/17. In my opinion, **Limited** assurance can be placed on the adequacy and effectiveness of Council's corporate internal controls framework in place and*

***Satisfactory** assurance can be placed on the Schools internal controls framework"*

The next internal audit annual opinion will be presented to the Audit Panel in July 2018.

External audit

The Council's governance, risk and control management arrangements are subject to an annual independent review by Grant Thornton, the Council's external auditors. The last review gave an unqualified opinion on the 2016/17 financial statements, commented on the need to create management capacity to effect transformational change, and noted that:

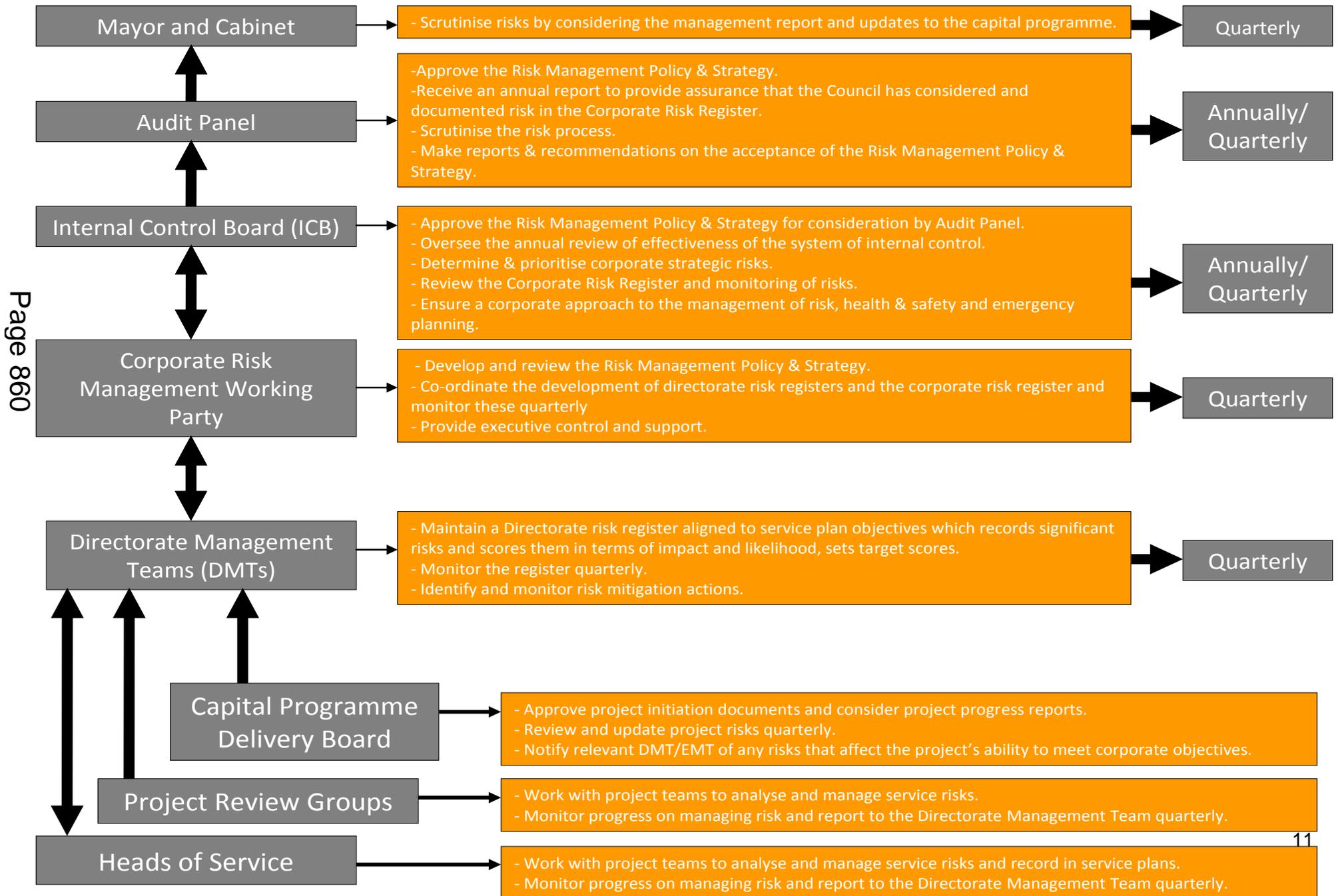
"... we are satisfied that in all significant respects the Council put in place proper arrangements to secure economy, efficiency and effectiveness in its use of resources..."

Audit Panel

The Council's Audit Panel meets quarterly and is made up of a mixture of Councillors and independent advisors. The key roles of the Panel are to:

- Review and comment on the strategy, plans and resources of Internal Audit. Internal Audit update reports, summarising the audit reports issued, management's progress on implementing any recommendations and the performance of the Internal Audit function, are received by the Panel on a quarterly basis.
- Consider and monitor the effectiveness of the Council's risk management arrangements, the control environment and associated anti-fraud and anti-corruption arrangements.
- Consider the external auditor's annual plan and other relevant external reports which contribute to the level of assurance.
- Consider the Council's annual Statement of Accounts and this statement and make comments to Full Council when it considers the accounts.

Risk and Strategy Framework



Compliance

The Monitoring Officer is central to ensuring compliance with the rules and procedures set out in the constitution. The Monitoring Officer attends Mayor and Cabinet and Full Council meetings and regularly briefs EMT, councillors and relevant staff on corporate legislative developments; and legal advice is incorporated in every council report. Where gaps or non-compliance are identified, appropriate action is taken. The financial management of the authority is conducted in accordance with financial regulations set out in the constitution and the Council has designated the Executive Director of Resources and Regeneration as its Chief Finance Officer, who advises on the proper administration of the Council's financial affairs, keeping proper financial records and maintaining effective systems of financial control. The Council has a [whistle-blowing policy](#) in place which is publicised on the Council's website. Complaints made under this policy are handled by the Monitoring Officer and an annual review is considered by the Standards Committee.

Training and Development

The Council runs a Member Development Programme, focussed on the period following local elections, which ensures that all Councillors have access to the training and development opportunities they need to fulfil their responsibilities to the local community and provide clear leadership and effective scrutiny of local Council functions. The development needs of senior officers are the responsibility of

the Head of Personnel and Development and the Monitoring Officer who are aware of their statutory duties and stay abreast any changes in relevant legislation. At the start of the financial year the Chief Executive defines objectives for each of the Executive Directors which are then cascaded to officers throughout the organisation through the Performance Evaluation Scheme.

Engaging the community and partners

The Council's engagement activity is overseen by the Strategy Performance and Communications Board (SPCB) which operates at Executive Director level and provides a strategic steer on the communication and consultation agendas within the Council.

The Council promotes e-Participation through its online engagement system which provides a platform through which citizens can respond to online consultations as well as set up and respond to e-Petitions. Ward-level Local Assemblies are an opportunity for residents to work with their ward councillors to shape the future of their neighbourhood; and the Young Citizens Panel gives young people aged 11 – 18 the chance to feed into council policy and spending decisions, including the use of the Young Mayor's budget.

The Council's website includes a page on open data and transparency, which gives information on spending; wages of senior managers; Freedom of Information requests; the annual audit of accounts; the pay policy; and Council decisions. The

arrangements for strategic partnership working are set out earlier in this statement. Periodically the Council also engages in wide consultation and communication activities.

How do we know our arrangements are working?

Throughout the year, the Council regularly reviews the effectiveness of its governance framework, including its system of internal control. Activity undertaken includes:

- Consideration of governance issues by the ICB – including risk registers, counter-fraud updates and internal audit reports.
- Preparation of a rolling plan of audit coverage to be achieved in the forthcoming year by the Head of Audit and Risk, primarily based on an assessment of the Council’s risk profile, and review of the plan by ICB.
- Receipt of the Internal Audit Strategy by the Audit panel and approval of the annual audit plan.
- Preparation of the annual assurance report by the Head of Resources, setting out his opinion on the Council’s overall control environment and approval of the report by the Audit Panel.
- Annual updates to the Public Accounts Select Committee on the work of the Audit Panel

- Consideration by EMT of a full range of governance and performance issues throughout the year, including issues relating to the improvement of the Internal Audit Service and scrutiny of performance and risk (ensuring management action is taken where necessary).
- Consideration of the following reports by the Standards Committee:
 - Compliance with the Member Code of Conduct (November 2017)
 - Review of Compliance with the Council’s Code of Corporate Governance (July 2017)
- Consideration of external audit reports by Mayor and Cabinet, Audit Panel and relevant Select Committees.
- Changes made by the Constitution Working Party, such as the introduction of the Pension Board

What are our governance priorities going forward?

Our priorities include:

- Managing risk and change across Council services in light of the further budget reductions the Council faces, whilst at the same time maintaining internal control;

- Addressing the external and internal audit findings reported to the Audit Panel in 2017/18 to maintain and, where necessary, improve the Council's financial controls.
- Reviewing the Council's vision, values and objectives through a range of community, partner and service strategies, consistent with the priorities of the new administration and environment in which the Council is operating.

Signed

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Audit Findings

Year ending 31 March 2018

London Borough of Lewisham Council
12 July 2018

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Contents



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Appendices

- A. Action plan
- B. Follow up of prior year recommendations
- C. Audit adjustments
- D. Fees
- E. Audit Opinion

The contents of this report relate only to those matters which came to our attention during the conduct of our normal audit procedures which are designed for the purpose of expressing our opinion on the financial statements. Our audit is not designed to test all internal controls or identify all areas of control weakness. However, where, as part of our testing, we identify control weaknesses, we will report these to you. In consequence, our work cannot be relied upon to disclose all defalcations or other irregularities, or to include all possible improvements in internal control that a more extensive special examination might identify. This report has been prepared solely for your benefit and should not be quoted in whole or in part without our prior written consent. We do not accept any responsibility for any loss occasioned to any third party acting, or refraining from acting on the basis of the content of this report, as this report was not prepared for, nor intended for, any other purpose.

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Headlines

This table summarises the key issues arising from the statutory audit of London Borough of Lewisham Council ('you') and the preparation of the group and your financial statements for the year ended 31 March 2018 for those charged with governance.

<p>Financial Statements</p>	<p>Under the International Standards of Auditing (UK) (ISAs), we are required to report whether, in our opinion:</p> <ul style="list-style-type: none"> the group and your financial statements give a true and fair view of the group and your financial position and of the group and your expenditure and income for the year, and have been properly prepared in accordance with the CIPFA/LASAAC code of practice on local authority accounting and prepared in accordance with the Local Audit and Accountability Act 2014. <p>We are also required to report whether other information published together with the audited financial statements (including the Statement of Accounts, Annual Governance Statement (AGS) and Narrative Report), is materially inconsistent with the financial statements or our knowledge obtained in the audit or otherwise appears to be materially misstated.</p>	<p>Our audit work was undertaken during June and July. Our findings are summarised on pages 5 to 21. We have not, as at the date of writing this report (6 July 2018) identified any adjustments to the financial statements that have impacted on your financial position. Audit adjustments are detailed in Appendix C. We have also raised recommendations for management as a result of our audit work in Appendix A. Our follow up of recommendations from the prior year's audit are detailed in Appendix B.</p> <p>Subject to outstanding queries being resolved, we anticipate issuing an unqualified audit opinion by 31 July 2018, as detailed in Appendix E.</p> <p><i>Outstanding items include the following items where we are awaiting information from you as at the date of writing this report in order to continue our work:</i></p> <ul style="list-style-type: none"> - receipt and review of employee starter and leaver forms; - receipt and review of responses to letters sent to management and those charged with governance; and - receipt and review of documentation supporting journals; <p><i>We are still completing work in the following areas, in addition to those areas above where we are awaiting information:</i></p> <ul style="list-style-type: none"> - non-domestic rates revenue; - testing of exit packages; - property, plant and equipment; - pension fund net liability; and <p><i>We are still to complete the following closing procedures, which are concluded at the end of the audit:</i></p> <ul style="list-style-type: none"> - senior management quality reviews; - receipt of your management representation letter; - consideration of subsequent events; - review of the final set of financial statements; and - review of Whole of Government Accounts. <p>We have yet to conclude that the other information published with the financial statements, which includes the Statement of Accounts, Annual Governance Statement and Narrative Report, are consistent our knowledge of your organisation and with the financial statements we are auditing.</p>
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Headlines continued

Value for Money arrangements

Under the National Audit Office (NAO) Code of Audit Practice ('the Code'), we are required to report whether, in our opinion:

- you have made proper arrangements to secure economy, efficiency and effectiveness in its use of resources ('the value for money (VFM) conclusion')

In our audit plan we reported a significant risk in respect of the governance arrangements over your transformation programmes. You are in the process of undertaking an internal review of these processes and in respect of a number of matters that have arisen. We are awaiting the conclusion of your review prior to undertaking our work in respect of this risk. This is unlikely to be completed by the deadline of 31 July 2018.

We plan to issue our vfm conclusion after we had an opportunity to consider your review and complete our work in respect of this risk.

We have undertaken work on the other significant risks we identified in our audit plan in respect of our vfm work. We will consider our final vfm conclusion once our work in respect of all significant risks is completed.

Statutory duties

The Local Audit and Accountability Act 2014 ('the Act') also requires us to:

- report to you if we have applied any of the additional powers and duties ascribed to us under the Act; and
- certify the closure of the audit

We have not exercised any of our additional statutory powers or duties.

In the prior year 2016/17 audit, we received two objections from electors in respect of your LOBO loans. We are still awaiting information from the Council to enable us to consider our response to these objections. As such, we have not yet certified the closure of the 2016/17 audit.

We will not be able to certify the conclusion of the 2017/18 audit until we have certified the closure of the prior year audit and completed our work in respect of your 2017/18 vfm conclusion.

Acknowledgements

We would like to take this opportunity to record our appreciation for the helpful assistance provided by management, the finance team and other staff during our audit.

Summary

Overview of the scope of our audit

This Audit Findings presents the observations arising from the audit that are significant to the responsibility of those charged with governance to oversee the financial reporting process, as required by International Standard on Auditing (UK) 260 and the Code of Audit Practice ('the Code'). Its contents have been discussed with management.

As auditor we are responsible for performing the audit, in accordance with International Standards on Auditing (UK), which is directed towards forming and expressing an opinion on the financial statements that have been prepared by management with the oversight of those charged with governance. The audit of the financial statements does not relieve management or those charged with governance of their responsibilities for the preparation of the financial statements.

Audit approach

Our audit approach was based on a thorough understanding of the group and your business and is risk based, and in particular included:

- An evaluation of the components of the group based on a measure of materiality, considering each as a percentage of total group assets and revenues to assess the significance of the component and to determine the planned audit response. From this evaluation we determined that a comprehensive audit response was required for the London Borough of Lewisham and a targeted, analytical approach was required for Lewisham Homes Limited and Catford Regeneration Partnership Limited components.
- An evaluation of your internal controls environment including your IT systems and controls; and
- Substantive testing on significant transactions and material account balances, including the procedures outlined in this report in relation to the key audit risks.

Conclusion

We are anticipating giving you an unqualified audit opinion, subject to the completion of outstanding work set out on page 3. As we are still completing work in a number of areas (highlighted on page 3) we will issue an addendum to this report should any further issues arise in the completion of our work, prior to issuing the opinion.

Our approach to materiality

The concept of materiality is fundamental to the preparation of the financial statements and the audit process and applies not only to the monetary misstatements but also to disclosure requirements and adherence to acceptable accounting practice and applicable law. Our materiality calculations have been updated from the planning materiality reported to you in the Audit Plan. This was to reflect the decrease in gross expenditure (adjusted for one-offs) in the 2017/18 draft accounts compared to the final 2016/17 accounts. The basis of the calculation (1.75% of gross expenditure) remains the same. We have not identified any areas that require a materiality for specific transactions, balances or disclosures. We have used this level of materiality for group consideration as the value of transactions through the subsidiaries would not have a significant impact on the materiality level

Amount (£)

Materiality for the financial statements	17,004,000
Performance materiality	11,903,000
Trivial matters	850,000

Significant audit risks

Risks identified in our Audit Plan

Commentary

1

Improper revenue recognition

Under ISA 240 (UK) there is a presumed risk that revenue may be misstated due to the improper recognition of revenue. This presumption can be rebutted if the auditor concludes that there is no risk of material misstatement due to fraud relating to revenue recognition.

Auditor commentary

Having considered the risk factors set out in ISA240 and the nature of your revenue streams, we have determined that the risk of fraud arising from revenue recognition can be rebutted, because:

- There is little incentive to manipulate revenue recognition.
- Opportunities to manipulate revenue recognition are very limited.
- The culture and ethical frameworks of local authorities, including London Borough of Lewisham Council, mean that all forms of fraud are seen as unacceptable.

Therefore we do not consider this to be a significant risk for you.

2

Management override of controls

Under ISA (UK) 240 there is a non-rebuttable presumed risk that the risk of management over-ride of controls is present in all entities. You face external scrutiny of your spending, and this could potentially place management under undue pressure in terms of how they report performance.

We identified management override of controls as a risk requiring special audit consideration.

Auditor commentary

We are undertaking the following work in relation to this risk:

- Review of accounting estimates, judgments and decisions made by management.
- Review of journal entry process and selection of large and unusual journal entries for testing back to supporting documentation.
- Review of accounting estimates, judgements and decisions made by management.
- Review of unusual significant transactions.

As set out on page 3, we have not completed our testing of journal transactions as we are awaiting information from management to enable us to complete our work. Subject to the satisfactory receipt of this evidence and completion of our work, at this stage we have not identified any material issues that require reporting.

Significant audit risks

Risks identified in our Audit Plan

Commentary

3

Valuation of property, plant and equipment

You revalue your land and buildings at least every five years as a minimum or more regularly where a five-yearly valuation is insufficient to keep pace with material changes to fair value, to ensure that carrying value is not materially different from fair value. This represents a significant estimate by management in the financial statements.

We identified the valuation of land and buildings revaluations and impairments as a risk requiring special audit consideration.

Auditor commentary

We are undertaking the following work in relation to this risk:

- Review of management's processes and assumptions for the calculation of the estimate.
- Review of the competence, expertise and objectivity of any management experts used.
- Review of the instructions issued to valuation experts and the scope of their work.
- Discussions with your valuer about the basis on which the valuation was carried out, challenging the key assumptions.
- Testing of revaluations made during the year to ensure they were input correctly into your asset register and financial statements.
- Review and challenge of the information used by the valuer to ensure it was robust and consistent with our understanding.
- Evaluation of the assumptions made by management for those assets not revalued during the year and how management satisfied themselves that these were not materially different to current value.

Our audit work completed so far has not identified any material issues in respect of valuation of property, plant and equipment

4

Valuation of pension fund net liability

Your pension fund liability as reflected in its balance sheet represent a significant estimate in the financial statements.

We identified the valuation of the pension fund net liability as a risk requiring special audit consideration.

Auditor commentary

We are undertaking the following work in relation to this risk

- Identifying the controls put in place by management to ensure that the pension fund net liability is not materially misstated and assessed whether those controls were implemented as expected and whether they were sufficient to mitigate the risk of material misstatement.
- Review of the competence, expertise and objectivity of the actuary who carried out your pension fund valuation.
- Gaining an understanding of the basis on which the IAS 19 valuation was carried out, undertaking procedures to confirm the reasonableness of the actuarial assumptions made.
- Review of the consistency of the pension fund net liability disclosures in notes to the financial statements with the actuarial report from your actuary.

Our audit work completed so far has not identified any material issues in respect of valuation of the pension fund net liability.

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Reasonably possible audit risks

Risks identified in our Audit Plan

Commentary

1

Employee remuneration

Payroll expenditure represents a significant percentage of your expenditure.

As the payroll expenditure comes from a number of individual transactions there is a risk that payroll expenditure in the accounts could be understated. We therefore identified completeness of payroll expenses as a risk requiring particular audit attention.

Auditor commentary

We are undertaking the following work in relation to this risk

- Documented our understanding of processes and key controls over the transaction cycle.
- Undertaken walkthrough of the key controls to assess the whether those controls were in line with our documented understanding.
- Obtained and reviewed the year-end payroll to general ledger reconciliation and investigated any significant reconciling items.
- Agree payroll related accruals to supporting documents and review the reasonableness of estimates.
- Completed substantive analytical procedures on the completeness of payroll.

As set out on page 3, we have not completed our testing of employee remuneration as we are awaiting information from management to enable us to complete our work. Subject to the satisfactory receipt of this evidence and completion of our work, at this stage we have not identified any material issues that require reporting.

2

Operating expenses

Non-pay expenses on other goods and services also represents a significant percentage of your operating expenses. Management uses judgement to estimate accruals of un-invoiced costs.

We identified completeness of non- pay expenses as a risk requiring particular audit attention:

Auditor commentary

The following audit work has been performed:

- Evaluated your accounting policy for recognition of non-pay expenditure for appropriateness; and
- Gained an understanding of the your system for accounting for non-pay expenditure and evaluate the design of the associated controls.

The following work is yet to be completed:

- Sample cut off testing of payments made in April and May 2018 to ensure these have been charged to the appropriate year. We are still waiting for some of these sample items back.

As set out on page 3, we have not completed our testing of operating expenses as we are awaiting information from management to enable us to complete our work. Subject to the satisfactory receipt of this evidence and completion of our work, at this stage we have not identified any significant issues that require reporting.

Accounting policies

Accounting area	Summary of policy	Comments	Assessment
Revenue recognition	<ul style="list-style-type: none"> Income from Council Tax, Non-Domestic Rates and rents is accounted for in the year it is due. Income from the sale of goods is recognised when you transfer the significant risks and rewards of ownership to the purchaser and it is probable that the economic benefits or service potential associated with the transaction will be received. Income from the provision of services is recognised when you can measure reliably the percentage of completion of the transaction and it is probable that the economic benefits or service potential associated with the transaction will be received. Interest receivable on investments and payable on borrowings is accounted for respectively as income and expenditure on the basis of the effective interest rate for the relevant financial instrument rather than the cash flows fixed or determined by the contract. 	We reviewed your revenue recognition policies. We have no material concerns with your revenue recognition policies or with the application of those policies. The revenue recognition policies adopted are in line with the CIPFA Code of Practice on Local Authority Accounting.	 Green
Judgements and estimates	<ul style="list-style-type: none"> Key estimates and judgements include <ul style="list-style-type: none"> Revaluations and impairments Useful life of PPE Expenditure accruals Accounting for PFI Schemes Valuation of pension fund net liability Provision for NNDR appeals Other provisions IAS 19 asset valuation 	We have not identified any material issues in relation to any of the areas of estimate and judgement reflected within the financial statements.	 Green
Other critical policies		We have reviewed your policies against the requirements of the CIPFA Code of Practice on Local Authority Accounting. Your accounting policies are appropriate and consistent with previous years.	 Green

Assessment

-  Marginal accounting policy which could potentially be open to challenge by regulators
-  Accounting policy appropriate but scope for improved disclosure
-  Accounting policy appropriate and disclosures sufficient

Other communication requirements

We set out below details of other matters which we, as auditors, are required by auditing standards and the Code to communicate to those charged with governance.

	Issue	Commentary
1	Matters in relation to fraud	We have previously discussed the risk of fraud with the Audit Panel. We have not been made aware of any incidents in the period and no other issues have been identified during the course of our audit procedures.
2	Matters in relation to related parties	We are not aware of any related parties or related party transactions which have not been disclosed.
3	Matters in relation to laws and regulations	You have not made us aware of any significant incidences of non-compliance with relevant laws and regulations and we have not identified any incidences from our audit work.
4	Written representations	A standard letter of representation has been requested from you, including specific representations in respect of the Group, which is included in the Audit Panel papers.
5	Confirmation requests from third parties	We requested from management permission to send confirmation requests to banking and investment institutions that you had deposits or loans with. This permission was granted and the requests were sent. All of the requests have been received and all were returned with positive confirmation.
6	Disclosures	Our review has so far found no material omissions in the financial statements.
7	Significant difficulties	We did not experience any significant difficulties in delivering our audit.

Other responsibilities under the Code

We set out below details of other matters which we, as auditors, are required by the Code to communicate to those charged with governance.

Issue	Commentary
1 Other information	<p>We are required to give an opinion on whether the other information published together with the audited financial statements (including the Statement of Accounts, Annual Governance Statement (AGS) and Narrative Report), is materially inconsistent with the financial statements or our knowledge obtained in the audit or otherwise appears to be materially misstated.</p> <p>No inconsistencies have been identified. We plan to issue an unqualified opinion in this respect – refer to appendix E</p>
2 Matters on which we report by exception	<p>We are required to report on a number of matters by exception in a numbers of areas:</p> <ul style="list-style-type: none"> • If the Annual Governance Statement does not meet the disclosure requirements set out in the CIPFA/SOLACE guidance or is misleading or inconsistent with the other information of which we are aware from our audit • If we have applied any of our statutory powers or duties <p>We have nothing to report on these matters</p>
3 Specified procedures for Whole of Government Accounts	<p>We are required to carry out specified procedures (on behalf of the NAO) on the Whole of Government Accounts (WGA) consolidation pack under WGA group audit instructions.</p> <p>As the Council exceeds the specified group reporting threshold of £500m we examine and report on the consistency of the WGA consolidation pack with the Council's audited financial statements. This work has not yet been completed and is subject to a later deadline. We will complete the work in later July and early August.</p>
4 Certification of the closure of the audit	<p>We do not expect to be able to certify the completion of the 2017/18 audit of London Borough of Lewisham Council in our auditor's report, as detailed in Appendix E. This is because the certificate for 2016/17 has not yet been issued, as we are awaiting information from management in respect of two objections received from an elector in 2017. In addition, we will need to undertake further work on our Value for Money conclusion in respect of the significant risk over your transformation projects, following the conclusion of your own review into matters arising in this area.</p>

Value for Money

Background to our VFM approach

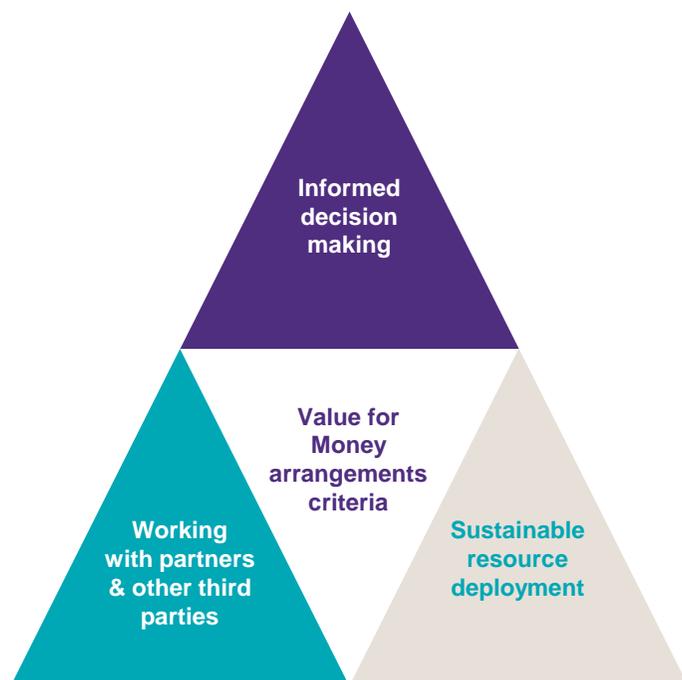
The NAO issued its guidance for auditors on Value for Money work for 2017/18 in November 2017. The guidance states that for local government bodies, auditors are required to give a conclusion on whether you have proper arrangements in place.

The guidance identifies one single criterion for auditors to evaluate:

“In all significant respects, the audited body takes properly informed decisions and deploys resources to achieve planned and sustainable outcomes for taxpayers and local people.”

This is supported by three sub-criteria, as set out below:

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Risk assessment

We carried out an initial risk assessment in January and February and identified a number of significant risks in respect of specific areas of proper arrangements using the guidance contained in AGN03. We communicated these risks to you in our Audit Plan dated February 2018. The risks that we identified were as follows:

- budget management;
- savings and medium term financial planning; and
- transformation

We have continued our review of relevant documents up to the date of giving our report, and have not identified any further significant risks where we need to perform further work.

We carried out further work only in respect of the significant risks we identified from our initial and ongoing risk assessment. Where our consideration of the significant risks determined that arrangements were not operating effectively, we have used the examples of proper arrangements from AGN 03 to explain the gaps in proper arrangements that we have reported in our VFM conclusion.

Value for Money

Our work

AGN 03 requires us to disclose our views on significant qualitative aspects of your arrangements for delivering economy, efficiency and effectiveness.

We have focused our work on the significant risks that we identified in your arrangements. In arriving at our conclusion, our main considerations were:

- Your outturn position against general fund revenue budgets for 2017/18
- Whether your Medium Term Financial Strategy is based up a reasonable assumptions
- The appropriateness of arrangements in place in respect of your transformation programmes

We have set out more detail on the risks we identified, the results of the work we performed and the conclusions we drew from this work on pages 14 to 19.

Overall conclusion

In our audit plan we reported a significant risk in respect of the governance arrangements over your transformation programmes. You are in the process of undertaking an internal review of these processes and in respect of a number of matters that have arisen. We are awaiting the conclusion of your review prior to undertaking our work in respect of this risk. This is unlikely to be completed by the deadline of 31 July 2018.

We plan to issue our vfm conclusion after we had an opportunity to consider your review and complete our work in respect of this risk.

We have undertaken work on the other significant risks we identified in our audit plan in respect of our vfm work. We will consider our final vfm conclusion once our work in respect of all significant risks is completed.

Recommendations for improvement

We discussed findings arising from our work with management and have agreed recommendation for improvement as follows.

Our recommendations and management's response to these can be found in the Action Plan at Appendix A

Significant difficulties in undertaking our work

We did not identify any significant difficulties in undertaking our work on your arrangements which we wish to draw to your attention.

Significant matters discussed with management

You are in the process of undertaking an internal review of governance arrangements over your transformation schemes. We are awaiting the conclusion of your review prior to completing our work.

Key findings

We set out below our key findings against the significant risks we identified through our initial risk assessment and further risks identified through our ongoing review of documents.

Significant risk	Findings and conclusion
<p>Budget Management</p> <p>You are currently (at risk assessment) projecting a £12.9m overspend on the 2017/18 budget. Should you utilise the risk and other budget pressures reserve in full this will reduce your overspend to £11.6m. This anticipated overspend is larger than the prior year overspend of £7m. Should the position worsen then this will increase the pressure into 2018/19.</p> <p>In response to this risk we have:</p> <ul style="list-style-type: none"> Updated our understanding of the pressures affecting the 2017/18 budget. Considered whether you have adequate arrangements to manage those pressures and to secure a sustainable financial position. Considered your approach towards the use of reserves. 	<p>Summary findings</p> <ul style="list-style-type: none"> Your 2017/18 outturn position delivered a net £16.5m (7.1%) overspend. This resulted from a significant directorate overspend of £20.6m offset by directorate underspends of £2.8m and £1.3m contingency held corporately for risks and other budget pressures. The Children and Young People directorate overspend of £15.6m (32%) is particularly significant. You need to gain a clear understanding of the circumstances that have driven the overspend and put in place robust measures to address these, as well as consider the sufficiency of the budgets in these areas. There is no guarantee non-departmental underspends will continue, so vigilance over future positions is critical. Failure to deliver to budget could have a significant impact on your financial health. You increased Lewisham's share of council tax by 4.99% for 2017/18 but, as service pressures are expected to grow, substantial efficiency and transformation savings will continue to be required across the organisation. <p>2017/18 Financial Performance</p> <p>Like most local authorities across the country, the London Borough of Lewisham is facing a challenging financial position and uncertainty around future funding. You faced a reduction of £13.5m in the Revenue Support Grant in 2017/18 (£46.1m) compared to 2016/17 (£59.1m). You set a balanced budget for 2017/18 which relied on achieving an identified £22.2m of savings, increasing your share of council tax by 4.99% (1.99% increase plus 3.00% increase for the Social Care Precept), use of £5.0m of the New Homes Bonus for revenue purposes and release of £6.5m of corporate budget to offset risks and pressures.</p> <p>The 2017/18 £22.3m savings programme was agreed by you in the Lewisham Future Programme in September 2016. The savings which were identified as part of the budget process were deducted from the relevant service's budget. The savings programmes were not directly monitored, as monitoring was undertaken on overall budgets. In our view, this results in a lack of transparency and clarity in identifying whether the overspends are the result of under-delivery of savings plans or genuine unavoidable pressures from demand increases. Without this clarity, you may not be able to properly assess the robustness of future plans and make an informed judgement as to the deliverability of the £13.0m of additional savings in the 2018/19 budget. This also risks hampering your ability to make informed decisions in response, and your ability to properly assess performance in delivering transformational savings. We would recommend strengthening governance in this area by specifically monitoring the delivery of savings programmes and the success of the schemes involved and, importantly, where savings are not delivered as planned, identifying the causal drivers behind this. This will also enable you to determine whether overspends are due to failed savings programmes or deficiencies in the budget setting and delivery processes. It is important to understand these distinctions as the responses needed in each case may differ. We will consider this further in our subsequent review of your transformation governance arrangements.</p> <p>Your financial outturn position shows a £16.5m overspend on the directorates' net general fund revenue budget. However, this position was after applying £1.3m of a one-off corporate sum for risks and other budget pressures. The underlying service level overspend is therefore £17.8m, with the most significant overspends in Children and Young People (15.6m or 32%) and Customer Services (£5.0m or 11.7%). These were offset by underspends elsewhere, including £1.9m in the Resource and Regeneration directorate and 0.9m in the Community Services directorate. Despite the overspends, the General Fund balance at year end remained at £13.0m and Earmarked reserves increased by around £10.5m to £160.1m.</p> <p>The overspends have been regularly communicated to senior officers and members. The financial position is reported to members through the quarterly Public Accounts Select Committee meetings as at May, September, December and January, and monthly to the Executive Management Team. Until January 2018 the Council was reporting an overspend of approximately £13.0m. This was largely driven by demand led services within the Children and Young People directorate, mainly children's social care, and the environment section of the Customer Services directorate.</p>

Key findings

We set out below our key findings against the significant risks we identified through our initial risk assessment and further risks identified through our ongoing review of documents.

Significant risk

Findings and conclusion

Budget Management

Continuation of risk noted on the previous page.

From May 2017, overspends in Children and Young People were forecast to be £7.0m and rose steadily to £8.6m in January 2018. That significant overspends were forecast from so early in the year indicates a weakness in the arrangements for identifying assumptions for the budget setting in this area. You should strengthen the budget setting arrangements and improve the robustness of the assumptions on which the budget is based. The overspend had increased significantly to £15.6m by the end of the year. The increase was not due to a dramatic surge in demand led services in February and March. Instead it was due to assumptions made in financial forecasting that included mitigations that had been expected to be made earlier in the year that had not come to fruition. This resulted in the additional overspend only being reported at the year end. This indicates a weakness in the arrangements around the reporting of financial information to management and members. The final overspend was due to demand throughout the year for residential care places (£3.2m), fostering (£2.0m), placements in semi-independent accommodation (£1.8m) and other placements. Furthermore, a £7.5m overspend on staffing, particularly due to agency spend to meet the increased demand, had a negative impact on the Children's Social Care budget. Also contributing to the overspend in the Children and Young People Directorate is an overspend of £1.0m on schools' transport due to the increased use of taxis for extra pupils being transported following a reduction in the number of buses in service. We recommend presenting more information around the mitigations included in the forecast outturn reports to enable closer scrutiny of these to prevent unexpected deterioration of the financial position at the end of the year.

The other significant area of overspend was £5.0m in the Customer Service directorate. The largest element of this was the £3.2m overspend in the Environment section. Most of this was attributable to the £2.1m overspend in the refuse service caused by the delay in implementing the move to fortnightly collections and introduction of the new food and garden waste service for which new vehicles were not procured in time to implement, leading to increased vehicle hire charges.

Authority	General fund reserves as at 31 March 2018	Gross service expenditure for 2017/18	Ratio of General Fund reserves to Gross service expenditure
	£000	£000	%
Lewisham	13,000	925,075	1.4%
Average (All London Boroughs)	19,672	879,996	2.7%
Neighbouring and comparable London Boroughs			
Greenwich	13,269	888,988	1.5%
Lambeth	22,851	1,301,324	1.8%
Newham	12,352	1,202,228	1.0%
Southwark	18,803	1,257,329	1.5%
Tower Hamlets	33,255	1,260,278	2.6%
Croydon	10,393	1,174,044	0.9%
Waltham Forest	14,572	863,711	1.7%

Your General Fund position has remained at £13.0m at 31 March 2018, which is the same as in 31 March 2017. This has been achieved through the use of one-off corporate resources, such as the £10.9m transfer of NHS long term creditors to Health Reserves and £6.5m surplus on Corporate Provisions.

This ratio of General Fund reserve to gross service expenditure is relatively low in comparison to other London Boroughs. It is around half that of the average of all London Boroughs, and when compared to your closest and most comparable size boroughs only Croydon and Lambeth have lower ratios. There is the risk that this level of General Fund Reserves is not sufficient to cope with the additional pressure of a significant unexpected incident.

Conclusion

There may be scope to strengthen governance and monitoring arrangements by monitoring savings delivery, shortfalls and causal factors, in addition to the normal budgetary monitoring processes. There is also scope to strengthen budgetary monitoring processes and the assumptions used in respect of demand-led growth. This view is subject to our outstanding work on the Transformation risk which we will consider in a later report.

Key findings (Continued)

Significant risk

Savings and medium term financial planning

You have set a balanced budget for 2018/19 which includes an overall increase in the total Council Tax of 4.20%, and savings of £4.9m. In addition, the budget proposals include a transfer of £5m from the New Homes Bonus reserve to the General Fund, the use of £3.6m reserves. You have also set aside £13.4m for identified and unidentified corporate risks and pressures. Going forward you will need to identify further savings of circa £35m for 2019/20 and 2020/21. Your Medium Term Financial Strategy anticipates that post 2020 approximately £10m per year of savings will be required.

In response to this risk we have:

- Considered your arrangements to identify and deliver savings and efficiencies towards achieving a sustainable medium term financial position.
- Updated our understanding of how you are working with partners in the local health economy to achieve savings.

Findings and conclusion

Summary findings

- For 2018/19, you have set a balanced budget, with generally robust underlying assumptions.
- You have increased your share of council tax by 3.99% but, as service pressures are expected to grow, substantial efficiency and transformation savings will continue to be required.
- Your Medium term financial strategy shows the budget has been balanced for 3 years with the use of reserves.
- You will need to make savings of around £53.6m between 2019/20 and 2022/23 – a significant requirement which highlights further the point made in the previous section about the importance of specifically monitoring savings scheme delivery and understanding shortfalls, over and above the existing budgetary monitoring processes. Savings required in 2019/20 are higher than in previous years, when lower levels of savings were not delivered.
- There are longer term pressures from demand led services that could continue to manifest in 2018/19 and beyond.
- You have £13m of general fund reserves to cushion you against the on-going financial challenges that you face over the medium term. However, these represent only 1.4% of your annual spend, and should be used to invest in future transformation, rather than propping up budgetary overspends.
- The first financial forecast for 2018/19 presented to the Public Accounts Select Committee up to May 2018 is forecasting a deficit of £14.8m, with a majority (£13.5m) again due to the Children and Young People directorate. This indicates weaknesses in the budget setting arrangements as the assumptions around the provision of children's social care appear not to have taken into account issues that led to similar overspends in 2017/18. This may indicate further improvements over the accuracy of activity assumptions are required.

2018/19 Budget Setting

You set a balanced budget for 2018/19 in February 2018. Reductions in Settlement Funding Assessment, inflation and service growth presented an overall budget gap of £8.6m to be funded from reserves. You have closed this through a £5.0m reserve transfer from the New Homes Bonus reserve to the General Fund for the third consecutive year and a further £3.6m one-off use of reserves. You have increased your share of council tax by 3.99% to provide an extra £10.2m, and identified planned savings of £4.86m.

The New Homes Bonus (NHB) paid by government is expected to decrease by between a third and a half from its 2018/19 level of £6.9m. Whilst your New Homes Bonus reserve has increased in value in recent years despite regular transfers to the General Fund, the NHB received may soon drop below the transfer levels, and in the long term the use of this sort of transfer will become unsustainable.

Schemes are reasonably well developed, and have been put in place for 2018/19. The structure enables you to focus on key streams and supports cross-cutting initiatives rather than top-slices to budgets. To maximise the impact of savings plans, project review should be incorporated more closely into the budget monitoring and outturn reports to ensure planned savings are delivering the desired effect. It is currently unclear from the budget report the extent to which overspends are being driven by purely demand led increases, against the success or failure of savings initiatives.

Medium Term Financial Strategy

Your latest Medium Term Financial Strategy (MTFS) is due to be published in July 2018. The financial outlook in the medium term remains very challenging for local government, with significant uncertainties over the economic and political environment. Beyond 2020 it is difficult to predict what the size of the challenge is as this will depend on the decisions of a future government. You have made prudent assumptions about your future funding, including the following:

- Government will phase out the Revenue Support Grant
- NNDR will be completely devolved to local government

Key findings (Continued)**Significant risk****Findings and conclusion****Savings and medium term financial planning**

Continuation of risk noted on page 16

- Council tax increases continue to be capped below 2 per cent, with a precept for social care
- The Collection fund will deliver a reducing surplus for the foreseeable future
- Pay and non-pay expenses will be subject to 2-3% inflationary pressures
- Pressures and risks growth of £6.5m - £7.5m for the three years of 2021/22 to cover additional expenditure associated with a growing, aging population, household growth, the impact of changes in legislation and regulations, and the impact of reducing preventative services in the early years of austerity

The July 2018 Medium Term Financial Strategy covers the four year period from 2019/20 to 2022/23. You have modelled best, worst and most likely case scenarios for this period. Comparing these saving scenarios to the ones in the July 2017 MTFS, you can see the impact the overspends in 2017/18 and the failure to meet savings targets has had in increasing the pressure over the next three year period. Under the above and other assumptions the range of estimates of future savings requirements (£m) is:

July 2017 MTFS	2018/19	2019/20	2020/21	2021/22	2022/23	Total	2019/20 to 2021/22		
Optimistic	20.77	10.31	6.99	8.73	-	46.80	26.03		
Main	21.28	10.85	10.04	9.41	-	51.58	30.3		
Pessimistic	24.85	14.63	17.19	12.74	-	69.41	44.56		
July 2018 MTFS		2019/20	2020/21	2021/22	2022/23	Total	2019/20 to 2021/22	Increase in savings required	
Optimistic	-	14.75	8.10	10.24	5.22	38.30	33.08	7.05	27%
Main	-	16.82	12.42	14.55	9.76	53.56	43.794	13.494	45%
Pessimistic	-	19.05	18.43	18.85	13.38	69.70	56.32	11.76	26%

In the July 2018 MTFS, between 2019/20 and 2021/22 the savings that are required to be found have increased by £13.5m, a 45% increase, compared to the July 2017 MTFS. This demonstrates the importance of having robust savings plans and delivering them in year rather than rolling them onto the next year when the ask may be more than can be managed.

Since 2015, your MTFS has made no allowance for inflation on non-pay expenses. This has meant that not only have you had to make savings year on year to offset losses in government funding, but that also cuts and service efficiencies have been required to absorb external inflationary cost pressures. This assumption has been removed from the July 2018 MTFS. A large element of your overspend pressures in recent years have related to 'needs led' statutory duties including supporting the most vulnerable, and sustained pressures arising from statutory duties relating to services such as waste and environmental health; the MTFS also assumes that these cost pressures will be met from your existing budgets. You have spent considerable effort seeking to mitigate these risks and it is important that you remain vigilant in how you monitor and manage these burdens.

The medium term financial plan is led by the Lewisham Futures Board, which develops savings options for the Mayor and cabinet to consider. Its focus has been on implementing the £21.3m savings for 2018/19. In a change from previous years, the current plan for 2019/20 and 2020/21 is not based around the 18 strategic work streams or themes that came from the Lewisham Future Board. The change of approach has been instigated by the new Chief Executive. It was felt the previous method had become overly complicated and lost some of the strategic value it was adding. The new method begins in July with Star Chambers overseen by the Executive Team challenging service leads on every aspect of their budgets. Detailed proposals for the cuts identified from these will be presented to members for scrutiny later in the year. Having made around £160m of reductions in expenditure in the eight years from 2010/11, the 'easy' savings and cuts have been made. Future savings will have to come from longer term projects, transforming how you provides services which requires up front investment to obtain future benefits. The effectiveness of your transformation governance is therefore essential to your future financial sustainability and achievement of challenging savings plans and budgets.

Key findings (Continued)**Significant risk****Findings and conclusion****Savings and medium term financial planning**

Continuation of risk noted on page 16

The first financial forecast for 2018/19 presented to the Public Accounts Select Committee up to May 2018 is forecasting a deficit of £14.8m, with a majority (£13.5m) again due to the Children and Young People directorate. This indicates weaknesses in the budget setting arrangements as the assumptions around the provision of children's social care appear not to have taken into account issues that led to similar overspends in 2017/18, given how soon the forecast overspends arise following the setting of the budget. This may indicate further improvements over the accuracy of activity assumptions are required. Containing these budget pressures will also depend on the effectiveness of your transformation governance, delivery of savings and demand management and outreach schemes, to ensure budgets can be delivered within the growth assumptions. The medium term planning shows an improving outlook which is broadly in line with your high level thinking over council tax and growth plans. However, more savings are proposed to 2019/20 than have been in place in previous years. This is a significant risk, as you have not managed to deliver the lower level of savings proposed in 2017/18. In addition, there are longer term pressures from demand led services that could continue to manifest in 2018/19 and beyond.

Reserves and financial position

Despite the financial pressures that you have faced and your investments in supporting the borough, once useable earmarked reserves are added to your £13m of general fund reserves, your overall reserves position is relatively healthy, compared to many London Boroughs. As at 31 March 2018, you had total general fund reserves and earmarked reserves excluding schools reserves of £149.9m, compared to £145.9 as at 31 March 2017 and £148.7m as at 31 March 2016.

The following table sets out a summary of your reserves position and key financial ratios as at 31 March 2018 relative to other London Boroughs as per their draft published financial statements for 2017/18:

London Borough of Lewisham - financial position: key performance measures			
Measure	London Borough of Lewisham	Average for London Boroughs	Ranking relative to other London Boroughs
Total general fund and non-schools earmarked general fund reserves as at 31 March 2018 (£m)	149,927	102,585	7 / 32
Total general fund and earmarked general fund reserves as at 31 March 2018 (£m)	173,123	112,862	7 / 32
Total usable revenue and capital reserves as at 31 March 2018 (£m)	347,452	253,530	7 / 32
Useable capital and revenue reserves as a percentage of gross service revenue expenditure	37.6%	28.9%	9 / 32
Current ratio (current assets / current liabilities)	2.00	1.50	5 / 32

This analysis highlights that as at 31 March 2018 your reserves level placed you in the top quartile of the 32 London Borough. Nevertheless, it is important that you take appropriate action to maintain your reserves position.

As it currently stands, your reserves level provides you with a measure of support in respect of the on-going financial challenges that you face over the medium term due to reductions in central government funding and forecast increases in demand for your core services. However, you only have finite reserves available and it is important that you continue to maintain appropriate budgetary control going forward. It is also important to develop a comprehensive reserves strategy, detailing the plans you have over the use of the reserves and, given their one off nature, the 'return on investment' you hope to achieve from strategic investment of these reserves over the medium term to support you transformation programme and efficiency schemes.

Key findings

We set out below our key findings against the significant risks we identified through our initial risk assessment and further risks identified through our ongoing review of documents.

Significant risk	Findings and conclusion
<p data-bbox="58 301 302 386">Savings and medium term financial planning</p> <p data-bbox="58 401 271 455">Continuation of risk noted on page 16</p>	<p data-bbox="341 301 472 329">Conclusion</p> <p data-bbox="341 344 1943 455">The early appearance of forecast significant overspend on the revenue budget in 2018/19 in similar areas to 2017/18 suggests weaknesses in the accuracy of the assumptions in this area. Development of a Reserves Strategy would ensure one-off monies are used effectively support the transformation needed to remain financially sustainable. Our final conclusion is subject to our outstanding work on the Transformation risk which we will consider in a later report.</p>

Key findings (Continued)

Significant risk

Findings and conclusion

Transformation

You are planning a significant transformation programme. This will be technology enabled and seek to drive the right cultural outcomes from, and for, people, facilitating innovation to drive transformational benefits – financial and non-financial – resulting in service improvements and better working with residents. Any transformation programme of this scale, complexity and ambition carries inherent risk.

In response to this risk we will:

- Update our understanding of overarching programme management arrangements.
- Consider whether you have adequate arrangements to manage the interdependencies, identify and realise planned benefits and ensure robust and effective programme governance.
- Assess the extent to which transformational plans and medium term financial planning is aligned, and whether assumptions in financial plans align with programme ambitions.

Summary findings

- You are currently undertaking an internal review of the governance arrangements over your transformation programmes. We are awaiting the conclusion of your review before completing our work in this area. Because of this we are not able to conclude against this significant risk at this stage. We will conclude our value for money conclusion once we have had an opportunity to consider the outcome of your review and consider the impact on our conclusion and on the other significant risks.

Independence and ethics

Independence and ethics

Ethical Standards and ISA (UK) 260 require us to give you timely disclosure of all significant matters that may bear upon the integrity, objectivity and independence of the firm or covered persons (including its partners, senior managers and managers). In this context, we disclose the following to you:

We confirm that we have implemented policies and procedures to meet the requirements of the Financial Reporting Council's Ethical Standard and we as a firm, and each covered person, confirm that we are independent and are able to express an objective opinion on the financial statements.

Further, we have complied with the requirements of the National Audit Office's Auditor Guidance Note 01 issued in December 2017 which sets out supplementary guidance on ethical requirements for auditors of local public bodies.

Details of fees charged are detailed in Appendix D

Audit and Non-audit services

For the purposes of our audit we have made enquiries of all Grant Thornton UK LLP teams providing services to the Council. The following non-audit services were identified:

Service	£	Threats	Safeguards
Audit related			
Certification of Housing capital receipts grant	3,500	Self-Interest (because this is a recurring fee)	The level of this recurring fee taken on its own is not considered a significant threat to independence as the fee for this work is £3,500 in comparison to the total fee for the audit of £193,233 and in particular relative to Grant Thornton UK LLP's turnover overall. Further, it is a fixed fee and there is no contingent element to it. These factors all mitigate the perceived self-interest threat to an acceptable level.
Certification of Teachers' Pension return	6,500	Self-Interest (because this is a recurring fee)	The level of this recurring fee taken on its own is not considered a significant threat to independence as the fee for this work £6,500 in comparison to the total fee for the audit of £193,233 and in particular relative to Grant Thornton UK LLP's turnover overall. Further, it is a fixed fee and there is no contingent element to it. These factors mitigate the perceived self-interest threat to an acceptable level.
Non-audit related			
Place Analytics subscription for 3 years from 2016/17	26,000	Self-Interest (because this is a recurring fee)	The level of this recurring fee taken on its own is not considered a significant threat to independence as the fee for this for 3 year period from 2016/17 was £26,000 in comparison to the total fee for the audit of £193,233 and in particular relative to Grant Thornton UK LLP's turnover overall. Further, it is a fixed fee and there is no contingent element to it. These factors mitigate the perceived self-interest threat to an acceptable level.

The amounts detailed are fees agreed to-date for audit related and non-audit services to be undertaken by Grant Thornton UK LLP in the current financial year. These services are consistent with the group's policy on the allotment of non-audit work to your auditors. All services have been approved by the Audit Panel. Any changes and full details of all fees charged for audit related and non-audit related services by Grant Thornton UK LLP and by Grant Thornton International Limited network member Firms will be included in our Audit Findings report at the conclusion of the audit.

None of the services provided are subject to contingent fees.

Action plan

We have identified recommendations for the Council as a result of issues identified during the course of our audit. We have agreed our recommendations with management and we will report on progress on these recommendations during the course of the 2018/19 audit. The matters reported here are limited to those deficiencies that we have identified during the course of our audit and that we have concluded are of sufficient importance to merit being reported to you in accordance with auditing standards.

Assessment	Issue and risk	Recommendations
1	 <p>Our testing of IT General Controls identified breaches of password policies, users with default responsibilities with excessive privileges and a lack of audit logging in Oracle EBC or the Database. There is the risk that passwords are not strong enough and unauthorised access may be gain to the Council's IT systems. The full details of the control findings have been shared with management.</p>	<p>The detailed recommendations have been shared with management.</p> <p>Management response</p>
2	 <p>Our testing of creditors identified an old creditor account with no activity for more than 5 years. The creditor was investigated and found not to be valid. Whilst it was not indicative of a material error, there risk is that there are other invalid creditors on the creditors ledger.</p>	<p>We recommend you review all creditor accounts that have had no activity for more than 6 months and determine whether the creditor remains valid.</p> <p>Management response</p>
3	 <p>The savings programmes were not directly monitored, as monitoring was undertaken only on overall budgets. In our view, this results in a lack of transparency and clarity in identifying whether the overspends are the result of under-delivery of savings plans or genuine unavoidable pressures from demand increases. Without this clarity, you may not be able to properly assess the robustness of future plans and make an informed judgement as to the deliverability of the £13.0m of additional savings in the 2018/19 budget. This also risks hampering your ability to make informed decisions in response, and your ability to properly assess performance in delivering transformational savings.</p>	<p>We would recommend strengthening governance in this area by specifically monitoring the delivery of savings programmes and the success of the schemes involved and, importantly, where savings are not delivered as planned, identifying and explaining the reasons behind this. This will also enable you to determine whether overspends are due to failed savings programmes or deficiencies in the budget setting and delivery processes. It is important to understand these distinctions as the responses needed in each case may differ.</p> <p>Management response</p>
4	 <p>You do not have a Reserves Strategy. There is the risk that you continue to use reserve transfers each year to balance budgets instead of pump prime transformation, preventing a strategic use of reserves.</p>	<p>We recommend you develop a comprehensive reserves strategy, detailing the plans you have over the use of the reserves. Given the one off nature of the transformation programme, you should detail the 'return on investment' you hope to achieve from strategic investment of these reserves over the medium term</p> <p>Management response</p>

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Controls

- High – Significant effect on control system
- Medium – Effect on control system
- Low – Best practice

Action plan (continued)

Assessment	Issue and risk	Recommendations
5	 <p>The financial forecast reports contained mitigations that were expected to be achieved in the first half of the year but were not, which reduced the forecast deficit position until the end of the year. This prevented management and members from gaining a full understanding of the levels of and reasons behind overspends.</p>	<p>We recommend presenting more information around the mitigations included in the forecast outturn reports to enable closer scrutiny of these, to enable greater monitoring in respect of unexpected deterioration of the financial position at the end of the year.</p>

Management response

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Controls

-  High – Significant effect on control system
-  Medium – Effect on control system
-  Low – Best practice

Follow up of prior year recommendations

We identified the following issues in the audit of London Borough of Lewisham Council's 2016/17 financial statements, which resulted in recommendations being reported in our 2016/17 Audit Findings report. We have followed up on the implementation of our recommendations and note they are still to be completed.

Assessment	Issue and risk previously communicated	Update on actions taken to address the issue
1	X	<ul style="list-style-type: none"> Work completed by our team of IT experts identified similar issues in work completed on the 2017/18 IT General Controls. Issues were in the areas of breaches of password policies, users with default responsibilities with excessive privileges and lack of audit logging in Oracle EBC or the Database.
Page 887	<p>We completed a high level review of your IT controls and at the shared service provider, focussing on the interface between the two. Consistent with previous years the review highlighted significant issues specifically around default passwords and accounts, audit logs, change management, separation of duties and access controls.</p>	
	<p>We have reported these findings in detail to management in a separate paper and we have discussed these with the Head of Financial Services.</p>	
	<p>We understand you are considering the future of your IT arrangements following the expiry of the current shared services contract.</p>	

Assessment

- ✓ Action completed
- X Not yet addressed

Audit Adjustments

We are required to report all non trivial misstatements to those charged with governance, whether or not the accounts have been adjusted by management.

Impact of adjusted misstatements

We have not identified any adjusting misstatements as part of our audit work to date.

Misclassification and disclosure changes

The table below provides details of misclassification and disclosure changes identified during the audit which management has agreed to amend in the final set of financial statements.

Disclosure omission	Detail	Auditor recommendations	Adjusted?
Housing Revenue Account Note 7	<ul style="list-style-type: none"> Figures in Note 7 of the HRA Statement haven't been updated for 2017/18. 	<ul style="list-style-type: none"> The table should be updated to reflect the correct figures. 	✓

Audit Adjustments

Impact of unadjusted misstatements

We have not identified any unadjusted misstatements in relation to the 2017/18 Statement of Accounts as at the date of writing this report.

Impact of prior year unadjusted misstatements

We have not identified any unadjusted misstatements in relation to the 2016/17 Statement of Accounts as at the date of writing this report.

Fees

We confirm below our final fees charged for the audit and provision of non-audit services.

Audit Fees

	Proposed fee	Final fee
Council Audit	£193,233	£TBC
Grant Certification	£30,370	£30,370
Total audit fees (excluding VAT)	£223,603	£223,603

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We will report the final proposed fees for the year following the conclusion of our work in respect of your vfm arrangements. Our fees for grant certification cover only housing benefit subsidy certification, which falls under the remit of Public Sector Audit Appointments Limited. Fees in respect of other grant work, such as reasonable assurance reports, are shown under 'Fees for other services'.

Non Audit Fees

Fees for other services	Fees
Audit related services:	
• Certification of Teachers' Pension return	£6,500
• Certification of Housing capital receipts grant	£3,500
Non-audit services	
• Place Analytics subscription	£26,000
Total (excluding VAT)	£36,000

Draft Audit opinion

We anticipate we will provide the Group with an unmodified audit report

Independent auditor's report to the members of London Borough of Lewisham

Report on the Audit of the Financial Statements

Opinion

We have audited the financial statements of London Borough of Lewisham (the 'Authority') and its subsidiaries (the 'group') for the year ended 31 March 2018 which comprise the Comprehensive Income and Expenditure Statement, the Movement in Reserves Statement, the Balance Sheet, the Cash Flow Statement, the Housing Revenue Account Comprehensive Income and Expenditure Statement, the Housing Revenue Account – Movement in Reserves Statement, the Collection Fund Revenue Account and notes to the financial statements, including a summary of significant accounting policies. The financial reporting framework that has been applied in their preparation is applicable law and the CIPFA/LASAAC code of practice on local authority accounting in the United Kingdom 2017/18.

In our opinion the financial statements:

- give a true and fair view of the financial position of the group and of the Authority as at 31 March 2018 and of the group's expenditure and income and the Authority's expenditure and income for the year then ended;
- have been prepared properly in accordance with the CIPFA/LASAAC code of practice on local authority accounting in the United Kingdom 2017/18; and
- have been prepared in accordance with the requirements of the Local Audit and Accountability Act 2014.

Basis for opinion

We conducted our audit in accordance with International Standards on Auditing (UK) (ISAs (UK)) and applicable law. Our responsibilities under those standards are further described in the Auditor's responsibilities for the audit of the financial statements section of our report. We are independent of the group and the Authority in accordance with the ethical requirements that are relevant to our audit of the financial statements in the UK, including the FRC's Ethical Standard, and we have fulfilled our other ethical responsibilities in accordance with these requirements. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our opinion.

Who we are reporting to

This report is made solely to the members of the Authority, as a body, in accordance with Part 5 of the Local Audit and Accountability Act 2014 and as set out in paragraph 43 of the Statement of Responsibilities of Auditors and Audited Bodies published by Public Sector Audit Appointments Limited. Our audit work has been undertaken so that we might state to the Authority's members those matters we are required to state to them in an auditor's report and for no other purpose. To the fullest extent permitted by law, we do not accept or assume responsibility to anyone other than the Authority and the Authority's members as a body, for our audit work, for this report, or for the opinions we have formed.

Conclusions relating to going concern

We have nothing to report in respect of the following matters in relation to which the ISAs (UK) require us to report to you where:

- the Executive Director for Resources and Regeneration's use of the going concern basis of accounting in the preparation of the financial statements is not appropriate; or
- the Executive Director for Resources and Regeneration has not disclosed in the financial statements any identified material uncertainties that may cast significant doubt about the group's or the Authority's ability to continue to adopt the going concern basis of accounting for a period of at least twelve months from the date when the financial statements are authorised for issue.

Other information

The Executive Director of Resource and Regeneration is responsible for the other information. The other information comprises the information included in the Statement of Accounts set out on pages **[**xx to xx**]**, the Narrative Statement by the Executive Director for Resources and Regeneration and the Annual Governance Statement, other than the group accounts and Authority financial statements and our auditor's report thereon. Our opinion on the financial statements does not cover the other information and, except to the extent otherwise explicitly stated in our report, we do not express any form of assurance conclusion thereon.

In connection with our audit of the financial statements, our responsibility is to read the other information and, in doing so, consider whether the other information is materially inconsistent with the financial statements or our knowledge of the group and Authority obtained in the course of our work including that gained through work in relation to the Authority's arrangements for securing value for money through economy, efficiency and effectiveness in the use of its resources or otherwise appears to be materially misstated. If we identify such material inconsistencies or apparent material misstatements, we are required to determine whether there is a material misstatement in the financial statements or a material misstatement of the other information. If, based on the work we have performed, we conclude that there is a material misstatement of this other information, we are required to report that fact.

We have nothing to report in this regard.

Other information we are required to report on by exception under the Code of Audit Practice

Under the Code of Audit Practice published by the National Audit Office on behalf of the Comptroller and Auditor General (the Code of Audit Practice) we are required to consider whether the Annual Governance Statement does not comply with the 'Delivering Good Governance in Local Government: Framework (2016)' published by CIPFA and SOLACE or is misleading or inconsistent with the information of which we are aware from our audit. We are not required to consider whether the Annual Governance Statement addresses all risks and controls or that risks are satisfactorily addressed by internal controls.

We have nothing to report in this regard.

Opinion on other matter required by the Code of Audit Practice

In our opinion, based on the work undertaken in the course of the audit of the financial statements and our knowledge of the Authority gained through our work in relation to the Authority's arrangements for securing economy, efficiency and effectiveness in its use of resources, the other information published together with the financial statements in the Statement of Accounts, the Narrative Statement by the Executive Director for Resource and Regeneration and the Annual Governance Statement for the financial year for which the financial statements are prepared is consistent with the financial statements.

Matters on which we are required to report by exception

Under the Code of Audit Practice we are required to report to you if:

- we have reported a matter in the public interest under section 24 of the Local Audit and Accountability Act 2014 in the course of, or at the conclusion of the audit; or
- we have made a written recommendation to the Authority under section 24 of the Local Audit and Accountability Act 2014 in the course of, or at the conclusion of the audit; or
- we have exercised any other special powers of the auditor under the Local Audit and Accountability Act 2014.

We have nothing to report in respect of the above matters.

Responsibilities of the Authority, the Executive Director of Resource and Regeneration and Those Charged with Governance for the financial statements

As explained more fully in the Statement of Responsibilities [set out on page(s) x to x], the Authority is required to make arrangements for the proper administration of its financial affairs and to secure that one of its officers has the responsibility for the administration of those affairs. In this authority, that officer is the Executive Director for Resource and Regeneration. The Executive Director for Resource and Regeneration is responsible for the preparation of the Statement of Accounts, which includes the financial statements, in accordance with proper practices as set out in the CIPFA/LASAAC code of practice on local authority accounting in the United Kingdom 2017/18, which give a true and fair view, and for such internal control as the Chief Financial Officer determines is necessary to enable the preparation of financial statements that are free from material misstatement, whether due to fraud or error.

In preparing the financial statements, the Executive Director for Resource and Regeneration is responsible for assessing the group's and the Authority's ability to continue as a going concern, disclosing, as applicable, matters related to going concern and using the going concern basis of accounting unless the group or the Authority lacks funding for its continued existence or when policy decisions have been made that affect the services provided by the group or the Authority.

The Audit Panel is Those Charged with Governance.

Auditor's responsibilities for the audit of the financial statements

Our objectives are to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditor's report that includes our opinion. Reasonable assurance is a high level of assurance, but is not a guarantee that an audit conducted in accordance with ISAs (UK) will always detect a material misstatement when it exists. Misstatements can arise from fraud or error and are considered material if, individually or in the aggregate, they could reasonably be expected to influence the economic decisions of users taken on the basis of these financial statements.

A further description of our responsibilities for the audit of the financial statements is located on the Financial Reporting Council's website at: www.frc.org.uk/auditorsresponsibilities. This description forms part of our auditor's report.

Report on other legal and regulatory requirements - Conclusion on the Authority's arrangements for securing economy, efficiency and effectiveness in its use of resources**Conclusion**

On the basis of our work, having regard to the guidance on the specified criterion issued by the Comptroller and Auditor General in November 2017, we are satisfied that the Authority put in place proper arrangements for securing economy, efficiency and effectiveness in its use of resources for the year ended 31 March 2018.

Responsibilities of the Authority

The Authority is responsible for putting in place proper arrangements for securing economy, efficiency and effectiveness in its use of resources, to ensure proper stewardship and governance, and to review regularly the adequacy and effectiveness of these arrangements.

Auditor's responsibilities for the review of the Authority's arrangements for securing economy, efficiency and effectiveness in its use of resources

We are required under Section 20(1)(c) of the Local Audit and Accountability Act 2014 to be satisfied that the Authority has made proper arrangements for securing economy, efficiency and effectiveness in its use of resources. We are not required to consider, nor have we considered, whether all aspects of the Authority's arrangements for securing economy, efficiency and effectiveness in its use of resources are operating effectively.

We have undertaken our review in accordance with the Code of Audit Practice, having regard to the guidance on the specified criterion issued by the Comptroller and Auditor General in November 2017, as to whether in all significant respects the Authority had proper arrangements to ensure it took properly informed decisions and deployed resources to achieve planned and sustainable outcomes for taxpayers and local people. The Comptroller and Auditor General determined this criterion as that necessary for us to consider under the Code of Audit Practice in satisfying ourselves whether the Authority put in place proper arrangements for securing economy, efficiency and effectiveness in its use of resources for the year ended 31 March 2018.

We planned our work in accordance with the Code of Audit Practice. Based on our risk assessment, we undertook such work as we considered necessary to be satisfied that the Authority has put in place proper arrangements for securing economy, efficiency and effectiveness in its use of resources.

Report on other legal and regulatory requirements - Delay in certification of completion of the audit

We are required to give an opinion on the consistency of the pension fund financial statements of the Authority included in the Pension Fund Annual Report with the pension fund financial statements included in the Statement of Accounts. The Local Government Pension Scheme Regulations 2013 require authorities to publish the Pension Fund Annual Report by 1 December 2018. As the Authority has not prepared the Pension Fund Annual Report at the time of this report we have yet to issue our report on the consistency of the pension fund financial statements. Until we have done so, we are unable to certify that we have completed the audit of the financial statements in accordance with the requirements of the Local Audit and Accountability Act 2014 and the Code of Audit Practice.

We cannot formally conclude the audit and issue an audit certificate in accordance with the requirements of the Local Audit and Accountability Act 2014 and the Code of Audit Practice until we have completed the work necessary to issue our Whole of Government Accounts (WGA) Component Assurance statement for the Authority for the year ended 31 March 2018. We are satisfied that this work does not have a material effect on the financial statements or on our conclusion on the Authority's arrangements for securing economy, efficiency and effectiveness in its use of resources for the year ended 31 March 2018.

We cannot formally conclude the audit and issue an audit certificate for the Authority for the year ended 31 March 2018 in accordance with the requirements of the Local Audit and Accountability Act 2014 and the Code of Audit Practice until we have completed our consideration of objections related to the year ended 31 March 2017 brought to our attention by local authority electors under Section 27 of the Local Audit and Accountability Act 2014. We are satisfied that these matters do not have a material effect on the financial statements or on our conclusion on the Authority's arrangements for securing economy, efficiency and effectiveness in its use of resources for the year ended 31 March 2018.

[Signature]

Paul Grady
found on behalf of Grant Thornton UK LLP, Appointed Auditor

30 Abchurch Lane
London
EC4A 3DF

[Date]

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Audit Findings

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July 2018

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Section

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2. Financial statements
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Appendices

- A. Action plan
- B. Follow up of prior year recommendations
- C. Audit adjustments
- D. Fees
- E. Audit Opinion

The contents of this report relate only to those matters which came to our attention during the conduct of our normal audit procedures which are designed for the purpose of expressing our opinion on the financial statements. Our audit is not designed to test all internal controls or identify all areas of control weakness. However, where, as part of our testing, we identify control weaknesses, we will report these to you. In consequence, our work cannot be relied upon to disclose all defalcations or other irregularities, or to include all possible improvements in internal control that a more extensive special examination might identify. This report has been prepared solely for your benefit and should not be quoted in whole or in part without our prior written consent. We do not accept any responsibility for any loss occasioned to any third party acting, or refraining from acting on the basis of the content of this report, as this report was not prepared for, nor intended for, any other purpose.

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Headlines

Introduction

This table summarises the key issues arising from the statutory audit of London Borough of Lewisham Pension Fund ('the Pension Fund') and the preparation of the Pension Fund's financial statements for the year ended 31 March 2018 for those charged with governance.

Financial Statements

Under the National Audit Office (NAO) Code of Audit Practice ('the Code'), we are required to report whether, in our opinion:

- the Pension Fund's financial statements give a true and fair view of the financial position of the Pension Fund and its income and expenditure for the year, and have been properly prepared in accordance with the CIPFA Code of Practice on Local Authority Accounting;

Our audit work was undertaken on site during June and July. Our findings are summarised on pages 4 to 12. Our work is still ongoing. We have not, in our work to date, identified any adjustments to the financial statements that have resulted in an adjustment to the Fund's reported financial position. Any audit adjustments will be detailed in Appendix C. We have also raised recommendations for management as a result of our audit work in Appendix A. Our follow up of recommendations from the prior year's audit are detailed in Appendix B.

Subject to outstanding queries being resolved, we anticipate issuing an unqualified audit opinion following the Audit Panel meeting on 12 July 2018, as detailed in Appendix E.

Outstanding items include the following items where we are awaiting information from you as at the date of writing this report in order to continue our work:

- receipt and review of contributions samples

We are still completing work in the following areas, in addition to those areas above where we are awaiting information:

- investments;
- benefits payable; and
- member data.

We are still to complete the following closing procedures, which are concluded at the end of the audit:

- senior management quality reviews;
- receipt of your management representation letter;
- consideration of subsequent events;
- review of the final set of financial statements; and
- review of Whole of Government Accounts.

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Acknowledgements

We would like to take this opportunity to record our appreciation for the assistance provided by the finance team and other staff during our audit.

Summary

Overview of the scope of our audit

This Audit Findings presents the observations arising from the audit that are significant to the responsibility of those charged with governance to oversee the financial reporting process, as required by International Standard on Auditing (UK) 260 and the Code of Audit Practice ('the Code'). Its contents will be discussed with management and the Audit Panel.

As auditor we are responsible for performing the audit, in accordance with International Standards on Auditing (UK), which is directed towards forming and expressing an opinion on the financial statements that have been prepared by management with the oversight of those charged with governance. The audit of the financial statements does not relieve management or those charged with governance of their responsibilities for the preparation of the financial statements.

Audit approach

Our audit approach was based on a thorough understanding of the Pension Fund's business and is risk based, and in particular included:

- An evaluation of the Pension Fund's internal controls environment, including its IT systems and controls;
- Controls testing of the benefits payable system; and
- Substantive testing on significant transactions and material account balances, including the procedures outlined in this report in relation to the key audit risks

Conclusion

We are anticipating giving you an unqualified audit opinion, subject to the completion of outstanding work set out on page 3. As we are still completing work in a number of areas (highlighted on page 3) we will issue an addendum to this report should any further issues arise in the completion of our work, prior to issuing the opinion.

Our approach to materiality

The concept of materiality is fundamental to the preparation of the financial statements and the audit process and applies not only to the monetary misstatements but also to disclosure requirements and adherence to acceptable accounting practice and applicable law.

Materiality calculations remains the same as reported in our audit plan. We detail in the table below our assessment of materiality for London Borough of Lewisham Pension Fund.

	Amount (£)
Materiality for the financial statements	12,746,000
Performance materiality	9,559,000
Trivial matters	637,000

Going concern

Our responsibility

As auditors, we are required to “obtain sufficient appropriate audit evidence about the appropriateness of management's use of the going concern assumption in the preparation and presentation of the financial statements and to conclude whether there is a material uncertainty about the entity's ability to continue as a going concern” (ISA (UK) 570).

Going concern commentary

Management's assessment process

Management have reviewed the Fund's funding position and cash flows.

Auditor commentary

- The Pension Fund has sufficient assets to meet its liabilities as they fall due over the next 12 months. Local Government Pension schemes are effectively underwritten by the tax payer with deficits financed by increased contributions agreed with the actuary that are financed through Council and Admitted and Scheduled bodies contributions.
- There is no plan by the Ministry of Housing, Communities and Local Government to wind up the London Borough of Lewisham Pension Scheme.
- The Pension Fund continues to operate as usual in 2018/19. Contributions and investment income continue to be received as expected.

Work performed

Detail audit work performed on management's assessment

Auditor commentary

- We have reviewed management's assessment that the financial statements are prepared on a going concern basis.
- We are satisfied that there are sufficient assets to meet liabilities as they fall due. The last triennial actuarial valuation as at 31 March 2016 also demonstrated an improvement in the funding level to 78%.
- The fund continues to operate as usual.

Concluding comments

Auditor commentary

- We are satisfied that the Pension Fund Financial Statements are prepared on a Going Concern basis.

Significant audit risks

Risks identified in our Audit Plan

Improper revenue recognition

Under ISA 240 (UK) there is a presumed risk that revenue may be misstated due to the improper recognition of revenue.

This presumption can be rebutted if the auditor concludes that there is no risk of material misstatement due to fraud relating to revenue recognition.

Commentary

Auditor commentary

Having considered the risk factors set out in ISA240 and the nature of the revenue streams at the Pension Fund, we have determined that the risk of fraud arising from revenue recognition can be rebutted, because:

- there is little incentive to manipulate revenue recognition
- opportunities to manipulate revenue recognition are very limited
- The culture and ethical frameworks of local authorities, including the London Borough of Lewisham Pension Fund, mean that all forms of fraud are seen as unacceptable

Therefore we do not consider this to be a significant risk for the London Borough of Lewisham Pension Fund.

Management override of controls

Under ISA (UK) 240 there is a non-rebuttable presumed risk that the risk of management over-ride of controls is present in all entities.

We identified management override of controls as a risk requiring special audit consideration.

Auditor commentary

We will complete the following work in relation to this risk:

- review of accounting estimates, judgements and decisions made by management
- testing of journal entries
- review of accounting estimates, judgements and decisions made by management
- review of unusual significant transactions
- review of significant related party transactions outside the normal course of business

Our audit work has not identified any issues in respect of management override of controls.

Significant audit risks

Risks identified in our Audit Plan

The valuation of Level 3 investments is incorrect

Under ISA 315 significant risks often relate to significant non-routine transactions and judgemental matters. Level 3 investments by their very nature require a significant degree of judgement to reach an appropriate valuation at year end.

We identified the valuation of level 3 investments as a risk requiring special audit consideration.

Commentary

Auditor commentary

We are undertaking the following work in relation to this risk:

- gain an understanding of the Fund's process for valuing level 3 investments and evaluate the design of the associated controls
- review the nature and basis of estimated values and consider what assurance management has over the year end valuations provided for these types of investments.
- consideration of the competence, expertise and objectivity of any management experts used.
- review the qualifications of the expert, Northern Trust, to value Level 3 investments at year end and gain an understanding of how the valuation of these investments has been reached.
- for a sample of investments, test the valuation by obtaining and reviewing the audited accounts, (where available) at the latest date for individual investments and agreeing these to the fund manager reports at that date. Reconcile those values to the values at 31 March 2018 with reference to known movements in the intervening period.

As set out on page 3, we have not completed our testing of the valuation of Level 3 investments as we are awaiting information from management to enable us to complete our work. Subject to the satisfactory receipt of this evidence and completion of our work, at this stage we have not identified any material issues that require reporting.

Reasonably possible audit risks

Risks identified in our Audit Plan

Contributions

Contributions from employers and employees' represents a significant percentage (83%) of the Fund's revenue.

We therefore identified occurrence and accuracy of contributions as a risk requiring particular audit attention

Commentary

Auditor commentary

We are undertaking the following work in relation to this risk:

- evaluate the Fund's accounting policy for recognition of contributions for appropriateness;
- gain an understanding of the Fund's system for accounting for contribution income and evaluate the design of the associated controls;
- test a sample of contributions to source data to gain assurance over their accuracy and occurrence;
- rationalise contributions received with reference to changes in member body payrolls and the number of contributing pensioners to ensure that any unusual trends are satisfactorily explained.

As set out on page 3, we have not completed our testing of contributions as we are awaiting information from management to enable us to complete our work. Subject to the satisfactory receipt of this evidence and completion of our work, at this stage we have not identified any material issues that require reporting.

Pension Benefits Payable

Pension benefits payable represents a significant percentage (88%) of the Fund's expenditure.

We identified completeness of pension benefits payable as a risk requiring particular audit attention:

Auditor commentary

We are undertaking the following work in relation to this risk:

- evaluate the Fund's accounting policy for recognition of pension benefits expenditure for appropriateness;
- gain an understanding of the Fund's system for accounting for pension benefits expenditure and evaluate the design of the associated controls;
- test the controls around the completeness, accuracy and occurrence of benefit payments
- test a sample of individual pensions in payment by reference to member files;
- rationalise pensions paid with reference to changes in pensioner numbers and increases applied in year to ensure that any unusual trends are satisfactorily explained.

As set out on page 3, we have not completed our testing of pensions benefits payable as we are awaiting information from management to enable us to complete our work. Subject to the satisfactory receipt of this evidence and completion of our work, at this stage we have not identified any material issues that require reporting.

Reasonably possible audit risks

Risks identified in our Audit Plan

The valuation of Level 2 investments is incorrect

While level 2 investments do not carry the same level of inherent risks associated with level 3 investments, there is still an element of judgement involved in their valuation as their very nature is such that they cannot be valued directly.

We identified valuation of level 2 investments as a risk requiring particular audit attention.

Commentary

Auditor commentary

We are undertaking the following work in relation to this risk:

- gain an understanding of the Fund's process for valuing Level 2 investments and evaluate the design of the associated controls.
- evaluate the nature and basis of estimated values and considered what assurance management has over the year end valuations provided for these types of investments.
- review the reconciliation of information provided by the pension fund's/individual fund manager's custodian and the Pension Scheme's own records and sought explanations for variances;
- consider the competence, expertise and objectivity of any management experts used.
- evaluate the qualifications of the expert, Northern Trust, to value the level 2 investments at year end and gained an understanding of how the valuation of these investment has been reached.
- for a sample of investments, test the valuation by obtaining independent information from custodian/manager on units and unit prices.

As set out on page 3, we have not completed our testing of the valuation of Level 2 investments as we are awaiting information from management to enable us to complete our work. Subject to the satisfactory receipt of this evidence and completion of our work, at this stage we have not identified any material issues that require reporting.

Accounting policies

Accounting area	Summary of policy	Comments	Assessment
Revenue recognition	<ul style="list-style-type: none"> Income - Dividend income earned from equity and bonds with BlackRock is reinvested and not repaid directly to the fund as cash, but from UBS is repaid to the Fund. Interest income is recognised in the Fund as it accrues. Any amount not received by the end of the accounting period will be disclosed in the note on Debtors and Creditors. 	The revenue recognition policy is consistent with the Code of Practice of Local Authority Accounting. Management have followed the policy in accounting for the funds revenue streams.	
Judgements and estimates	<ul style="list-style-type: none"> Key estimates and judgements include; <ul style="list-style-type: none"> Valuation of level 3 investments The assumptions within the IAS26 calculation of the present value of future retirement benefits The assumptions within the triennial valuation 	<p>The policies adopted for material accounting estimates appear to be appropriate under the Code of Practice of Local Authority Accounting.</p> <p>Our testing to date indicates that the material estimates included in the financial statements have been calculated based on reasonable judgements and assumptions from experts.</p>	
Other critical policies		We have reviewed the Pension Fund's policies against the requirements of the CIPFA Code of Practice. The Pension Fund's accounting policies are appropriate and consistent with previous years.	

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Assessment

-  Marginal accounting policy which could potentially be open to challenge by regulators
-  Accounting policy appropriate but scope for improved disclosure
-  Accounting policy appropriate and disclosures sufficient

Other communication requirements

We set out below details of other matters which we, as auditors, are required by auditing standards and the Code to communicate to those charged with governance.

	Issue	Commentary
①	Matters in relation to fraud	<ul style="list-style-type: none"> We have previously discussed the risk of fraud with the Audit Panel. We have not been made aware of any incidents in the period and no other issues have been identified during the course of our audit procedures.
②	Matters in relation to related parties	<ul style="list-style-type: none"> Based on work completed so far, we are not aware of any related parties or related party transactions which have not been disclosed
③	Matters in relation to laws and regulations	<ul style="list-style-type: none"> You have not made us aware of any significant incidences of non-compliance with relevant laws and regulations and we have not identified any incidences from our audit work.
④	Written representations	<ul style="list-style-type: none"> Based on work completed so far, a standard letter of representation will be requested from the Pension Fund.
⑤	Confirmation requests from third parties	<ul style="list-style-type: none"> We requested from management permission to send confirmation request to investment and bank institutions. This permission was granted and the requests were sent.. All but one of these requests were returned with positive confirmation. The outstanding request is being chased with the support of management.
⑥	Disclosures	<ul style="list-style-type: none"> Based on work completed so far, our review found no material omissions in the financial statements
⑦	Significant difficulties	<ul style="list-style-type: none"> We have not had any issues with accounts closedown, production of draft accounts or working papers.
⑧	Matters on which we report by exception	<ul style="list-style-type: none"> We are required to give a separate opinion for the Pension Fund Annual Report on whether the financial statements included therein are consistent with the audited financial statements. Due to statutory deadlines the Pension Fund Annual Report is not required to be published until the 1st December 2018 and therefore this report has not yet been produced. We have therefore not given this separate opinion at this time and are unable to certify completion of the audit of the administering authority until this work has been completed.

Independence and ethics

Independence and ethics

- We confirm that there are no significant facts or matters that impact on our independence as auditors that we are required or wish to draw to your attention. We have complied with the Financial Reporting Council's Ethical Standard and confirm that we, as a firm, and each covered person, are independent and are able to express an objective opinion on the financial statements

We confirm that we have implemented policies and procedures to meet the requirements of the Financial Reporting Council's Ethical Standard and we as a firm, and each covered person, confirm that we are independent and are able to express an objective opinion on the financial statements.

Further, we have complied with the requirements of the National Audit Office's Auditor Guidance Note 01 issued in December 2017 which sets out supplementary guidance on ethical requirements for auditors of local public bodies.

Details of fees charged are detailed in Appendix D

Audit and Non-audit services

For the purposes of our audit we have made enquiries of all Grant Thornton UK LLP teams providing services to the Pension Fund. No non-audit services were identified.

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Action plan

We have identified [X] of recommendations for the Pension Fund as a result of issues identified during the course of our audit. We have agreed our recommendations with management and we will report on progress on these recommendations during the course of the 2018/19 audit. The matters reported here are limited to those deficiencies that we have identified during the course of our audit and that we have concluded are of sufficient importance to merit being reported to you in accordance with auditing standards.

1	Assessment	Issue and risk	Recommendations
	●	<ul style="list-style-type: none"> In 2016/17 we identified instances where new joiners paid 2 months contributions in their second month and this date was set as their start date for pensions purposes, rather than the date they started working for London Borough of Lewisham. 	<ul style="list-style-type: none"> As part of the contribution reconciliation, follow up cases where a new joiner has not contributed so that the correct start-date can then be followed through and updated accordingly in the pensions system Altair. <p data-bbox="1058 562 1313 585">Management response</p>

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Controls

- High – Significant effect on control system
- Medium – Effect on control system
- Low – Best practice

Follow up of prior year recommendations

We identified the following issues in the audit of London Borough of Lewisham Pension Fund's 2016/17 financial statements, which resulted in 4 recommendations being reported in our 2016/17 Audit Findings report. We have followed up on the implementation of our recommendations and note 2 are still to be completed.

	Assessment	Issue and risk previously communicated	Update on actions taken to address the issue
1	✓	<ul style="list-style-type: none"> Review the format of disclosures in the accounts for consistency with the Code and model accounts, particularly with respect to benefit payments. 	<ul style="list-style-type: none"> The disclosure note for benefits payable was changed last year to reflect the model accounts and remains so this year. All other disclosures are consistent with the Code and model accounts where applicable.
2	✓	<ul style="list-style-type: none"> Review working papers and ensure they can be clearly reconciled to the pension fund accounts. 	<ul style="list-style-type: none"> Working papers have been updated this year to ensure a clear and thorough link to the accounts
3	X	<ul style="list-style-type: none"> As part of the contribution reconciliation, follow up cases where a new joiner has not contributed so that the correct start-date can then be followed through and updated accordingly in the pensions system Altair. 	<ul style="list-style-type: none"> This is not currently part of the contribution reconciliation. It has been re-raised as a recommendation for 2017/18.
4	X	<ul style="list-style-type: none"> Review the ledger coding structure for pensions benefit payments so that the Council is able to extract the information required for benefits disclosures. 	<ul style="list-style-type: none"> This has not been implemented. The current manual process of running ResourceLink reports for each type of body and matching back to coded payments continues to be used which is sufficient.

Assessment

- ✓ Action completed
- X Not yet addressed

Audit Adjustments

We are required to report all non trivial misstatements to those charged with governance, whether or not the accounts have been adjusted by management.

Impact of adjusted misstatements

We have not identified any adjusting misstatements as part of our audit work to date.

Misclassification and disclosure changes

The table below provides details of misclassification and disclosure changes identified during the audit to date which management has agreed to make in the final set of financial statements.

Disclosure omission	Detail	Auditor recommendations	Adjusted?
Actuarial present value	<ul style="list-style-type: none"> In accounting policy (q), the actuarial present value of future retirement benefits to be (on IAS 19 basis) was disclosed as £1,934m. This should have been £1,871m. 	<ul style="list-style-type: none"> Update the disclosure to agree with the actuary's report. 	✓
Member data	<ul style="list-style-type: none"> The disclosure of member data in Note 17 did not include movements from March 2018. 	<ul style="list-style-type: none"> Provide a revised note of member data 	✓

Impact of unadjusted misstatements

We have not identified any unadjusted misstatements in relation to the 2017/18 Statement of Accounts as at the date of writing this report.

Impact of prior year unadjusted misstatements

We have not identified any unadjusted misstatements in relation to the 2016/17 Statement of Accounts as at the date of writing this report.

Fees

We confirm below our final fees charged for the audit and confirm there were no fees for the provision of non audit or audit related services

Audit Fees

	Proposed fee (£)	Final fee (£)
Pension Fund Audit	21,000	21,000
Total audit fees (excluding VAT)	21,000	21,000

The proposed fees for the year were in line with the scale fee set by Public Sector Audit Appointments Ltd (PSAA)

Draft audit opinion

We anticipate we will provide the Pension Fund with an unmodified audit report

Independent auditor's report to the members of London Borough of Lewisham on the pension fund financial statements

Opinion

We have audited the pension fund financial statements of London Borough of Lewisham (the 'Authority') for the year ended 31 March 2018 set out on pages *** to ** which comprise the Fund Account, the Net Assets Statement and notes to the pension fund financial statements, including a summary of significant accounting policies. The financial reporting framework that has been applied in their preparation is applicable law and the CIPFA/LASAAC code of practice on local authority accounting in the United Kingdom 2017/18.

In our opinion the pension fund financial statements:

- give a true and fair view of the financial transactions of the pension fund during the year ended 31 March 2018 and of the amount and disposition at that date of the fund's assets and liabilities;
- have been prepared properly in accordance with the CIPFA/LASAAC code of practice on local authority accounting in the United Kingdom 2017/18; and
- have been prepared in accordance with the requirements of the Local Audit and Accountability Act 2014.

Basis for opinion

We conducted our audit in accordance with International Standards on Auditing (UK) (ISAs (UK)) and applicable law. Our responsibilities under those standards are further described in the Auditor's responsibilities for the audit of the financial statements section of our report. We are independent of the pension fund of the Authority in accordance with the ethical requirements that are relevant to our audit of the pension fund financial statements in the UK, including the FRC's Ethical Standard, and we have fulfilled our other ethical responsibilities in accordance with these requirements. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our opinion.

Who we are reporting to

This report is made solely to the members of the Authority, as a body, in accordance with Part 5 of the Local Audit and Accountability Act 2014 and as set out in paragraph 43 of the Statement of Responsibilities of Auditors and Audited Bodies published by Public Sector Audit Appointments Limited. Our audit work has been undertaken so that we might state to the Authority's members those matters we are required to state to them in an auditor's report and for no other purpose. To the fullest extent permitted by law, we do not accept or assume responsibility to anyone other than the Authority and the Authority's members as a body, for our audit work, for this report, or for the opinions we have formed.

Conclusions relating to going concern

We have nothing to report in respect of the following matters in relation to which the ISAs (UK) require us to report to you where:

- the Executive Director for Resource and Regeneration's use of the going concern basis of accounting in the preparation of the pension fund financial statements is not appropriate; or
- the Executive Director for Resource and Regeneration has not disclosed in the pension fund financial statements any identified material uncertainties that may cast significant doubt about the Authority's ability to continue to adopt the going concern basis of accounting for a period of at least twelve months from the date when the pension fund financial statements are authorised for issue.

Other information

The Executive Director for Resource and Regeneration is responsible for the other information. The other information comprises the information included in the Statement of Accounts set out on pages [**xx to xx**], the Narrative Report and the Annual Governance Statement, other than the pension fund financial statements, our auditor's report thereon and our auditor's report on the Authority's financial statements. Our opinion on the pension fund financial statements does not cover the other information and, except to the extent otherwise explicitly stated in our report, we do not express any form of assurance conclusion thereon. In connection with our audit of the pension fund financial statements, our responsibility is to read the other information and, in doing so, consider whether the other information is materially inconsistent with the pension fund financial statements or our knowledge of the pension fund of the Authority obtained in the course of our work or otherwise appears to be materially misstated. If we identify such material inconsistencies or apparent material misstatements, we are required to determine whether there is a material misstatement in the pension fund financial statements or a material misstatement of the other information. If, based on the work we have performed, we conclude that there is a material misstatement of this other information, we are required to report that fact. We have nothing to report in this regard.

Opinion on other matter required by the Code of Audit Practice published by the National Audit Office on behalf of the Comptroller and Auditor General (the Code of Audit Practice)

In our opinion, based on the work undertaken in the course of the audit of the pension fund financial statements the other information published together with the pension fund financial statements in the Statement of Accounts, the Narrative Report and the Annual Governance Statement for the financial year for which the pension fund financial statements are prepared is consistent with the pension fund financial statements.

Matters on which we are required to report by exception

Under the Code of Audit Practice we are required to report to you if:

- we have reported a matter in the public interest under section 24 of the Local Audit and Accountability Act 2014 in the course of, or at the conclusion of the audit; or
- we have made a written recommendation to the Authority under section 24 of the Local Audit and Accountability Act 2014 in the course of, or at the conclusion of the audit; or
- we have exercised any other special powers of the auditor under the Local Audit and Accountability Act 2014.

We have nothing to report in respect of the above matters.

Responsibilities of the Authority, the Executive Director for Resource and Regeneration and Those Charged with Governance for the financial statements

As explained more fully in the Statement of Responsibilities [set out on page(s) x to x], the Authority is required to make arrangements for the proper administration of its financial affairs and to secure that one of its officers has the responsibility for the administration of those affairs. In this authority, that officer is the Executive Director for Resource and Regeneration. The Executive Director for Resource and Regeneration is responsible for the preparation of the Statement of Accounts, which includes the pension fund financial statements, in accordance with proper practices as set out in the CIPFA/LASAAC code of practice on local authority accounting in the United Kingdom 2017/18, which give a true and fair view, and for such internal control as the Executive Director for Resource and Regeneration determines is necessary to enable the preparation of pension fund financial statements that are free from material misstatement, whether due to fraud or error.

In preparing the pension fund financial statements, the Executive Director for Resource and Regeneration is responsible for assessing the pension fund's ability to continue as a going concern, disclosing, as applicable, matters related to going concern and using the going concern basis of accounting unless the pension fund lacks funding for its continued existence or when policy decisions have been made that affect the services provided by the pension fund.

The Audit Panel is Those Charged with Governance.

Auditor's responsibilities for the audit of the financial statements

Our objectives are to obtain reasonable assurance about whether the pension fund financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditor's report that includes our opinion. Reasonable assurance is a high level of assurance, but is not a guarantee that an audit conducted in accordance with ISAs (UK) will always detect a material misstatement when it exists. Misstatements can arise from fraud or error and are considered material if, individually or in the aggregate, they could reasonably be expected to influence the economic decisions of users taken on the basis of these pension fund financial statements.

A further description of our responsibilities for the audit of the pension fund financial statements is located on the Financial Reporting Council's website at: www.frc.org.uk/auditorsresponsibilities. This description forms part of our auditor's report.

[Signature]

Paul Grady
for and on behalf of Grant Thornton UK LLP, Appointed Auditor

30 Finsbury Square
London
EC2P 2YU

[Date]

Page 9 of 12

{Prepare on client letterhead**}**

Grant Thornton UK LLP
30 Finsbury Square
London
EC2A 1AG

[Click **here** and enter **date of letter**]

Dear Sirs

**London Borough of Lewisham Pension Fund
Financial Statements for the year ended 31 March 2018**

This representation letter is provided in connection with the audit of the financial statements of London Borough of Lewisham Pension Fund (the Fund) for the year ended 31 March 2018 for the purpose of expressing an opinion as to whether the Fund financial statements are presented fairly, in all material respects in accordance with International Financial Reporting Standards and the CIPFA/LASAAC Code of Practice on Local Authority Accounting in the United Kingdom 2017/18 and applicable law.

We confirm that to the best of our knowledge and belief having made such inquiries as we considered necessary for the purpose of appropriately informing ourselves:

Financial Statements

- i We have fulfilled our responsibilities for the preparation of the Fund's financial statements in accordance with International Financial Reporting Standards and the CIPFA/LASAAC Code of Practice on Local Authority Accounting in the United Kingdom 2017/18 ("the Code"); in particular the financial statements are fairly presented in accordance therewith.
- ii We have complied with the requirements of all statutory directions affecting the Fund and these matters have been appropriately reflected and disclosed in the financial statements.
- iii The Fund has complied with all aspects of contractual agreements that could have a material effect on the financial statements in the event of non-compliance. There has been no non-compliance with requirements of any regulatory authorities that could have a material effect on the financial statements in the event of non-compliance.
- iv We acknowledge our responsibility for the design, implementation and maintenance of internal control to prevent and detect fraud.
- v We acknowledge our responsibilities for making the accounting estimates included in the financial statements. Significant assumptions used by us in making accounting estimates, including those measured at fair value, are reasonable. Where it was necessary to choose between estimation techniques that comply with the Code, we selected the estimation technique considered to be the most appropriate to the Fund's particular circumstances for the purpose of giving a true and fair view. Those estimates reflect our judgement based on our knowledge and experience about past and current events and are also based on our assumptions about conditions we expect to exist and courses of action we expect to take.

- vi We are satisfied that the material judgements used in the preparation of the financial statements are soundly based, in accordance with the Code and adequately disclosed in the financial statements. There are no other material judgements that need to be disclosed.
- vii Except as disclosed in the financial statements:
 - a there are no unrecorded liabilities, actual or contingent
 - b none of the assets of the Council has been assigned, pledged or mortgaged
 - c there are no material prior year charges or credits, nor exceptional or non-recurring items requiring separate disclosure.
- viii Related party relationships and transactions have been appropriately accounted for and disclosed in accordance with the requirements of International Financial Reporting Standards and the Code.
- ix All events subsequent to the date of the financial statements and for which International Financial Reporting Standards and the Code require adjustment or disclosure have been adjusted or disclosed.
- x The financial statements are free of material misstatements, including omissions.
- xi Actual or possible litigation and claims have been accounted for and disclosed in accordance with the requirements of International Financial Reporting Standards.
- xii We have no plans or intentions that may materially alter the carrying value or classification of assets and liabilities reflected in the financial statements.
- xiii We believe that the Fund's financial statements should be prepared on a going concern basis on the grounds that current and future sources of funding or support will be more than adequate for the Fund's needs. We believe that no further disclosures relating to the Fund's ability to continue as a going concern need to be made in the financial statements.

Information Provided

- xiv We have provided you with:
 - a. access to all information of which we are aware that is relevant to the preparation of the Fund financial statements such as records, documentation and other matters;
 - b. additional information that you have requested from us for the purpose of your audit; and
 - c. unrestricted access to persons within the Fund from whom you determined it necessary to obtain audit evidence.
- xv We have communicated to you all deficiencies in internal control of which management is aware.
- xvi All transactions have been recorded in the accounting records and are reflected in the financial statements.

- xvii We have disclosed to you the results of our assessment of the risk that the financial statements may be materially misstated as a result of fraud.
- xviii We have disclosed to you all information in relation to fraud or suspected fraud that we are aware of and that affects the Fund and involves:
 - a. management;
 - b. employees who have significant roles in internal control; or
 - c. others where the fraud could have a material effect on the financial statements.
- xix We have disclosed to you all information in relation to allegations of fraud, or suspected fraud, affecting the financial statements communicated by employees, former employees, analysts, regulators or others.
- xx We have disclosed to you all known instances of non-compliance or suspected non-compliance with laws and regulations whose effects should be considered when preparing financial statements.
- xxi There have been no communications with The Pensions Regulator or other regulatory bodies during the year or subsequently concerning matters of non-compliance with any legal duty.
- xxii We are not aware of any reports having been made to The Pensions Regulator by any of our advisors.
- xxiii We have disclosed to you the identity of the Fund's related parties and all the related party relationships and transactions of which we are aware.
- xxiv We have disclosed to you all known actual or possible litigation and claims whose effects should be considered when preparing the financial statements.

Approval

The approval of this letter of representation was minuted by the Council's Audit Panel at its meeting on 12 July 2018.

Yours faithfully

Name.....

Position.....

Date.....

Name.....

Position.....

Date.....

Signed on behalf of Council as administering body of the Pension Fund

{Prepare on client letterhead**}**

Grant Thornton UK LLP
30 Finsbury Square
London
EC2A 1AG

[Click [here](#) and enter **date of letter**]

Dear Sirs

**London Borough of Lewisham
Financial Statements for the year ended 31 March 2018**

This representation letter is provided in connection with the audit of the financial statements of London Borough of Lewisham and its subsidiary undertakings, Lewisham Homes Ltd and Catford Regeneration Partnership Limited for the year ended 31 March 2018 for the purpose of expressing an opinion as to whether the group and parent Council financial statements are presented fairly, in all material respects in accordance with International Financial Reporting Standards and the CIPFA/LASAAC Code of Practice on Local Authority Accounting in the United Kingdom 2017/18 and applicable law.

We confirm that to the best of our knowledge and belief having made such inquiries as we considered necessary for the purpose of appropriately informing ourselves:

Group Financial Statements

- i We have fulfilled our responsibilities for the preparation of the group and parent Council's financial statements in accordance with International Financial Reporting Standards and the CIPFA/LASAAC Code of Practice on Local Authority Accounting in the United Kingdom 2017/18 ("the Code"); in particular the group and parent Council financial statements are fairly presented in accordance therewith.
- ii We have complied with the requirements of all statutory directions affecting the group and parent Council and these matters have been appropriately reflected and disclosed in the group and parent Council financial statements.
- iii The Council has complied with all aspects of contractual agreements that could have a material effect on the group and parent Council financial statements in the event of non-compliance. There has been no non-compliance with requirements of any regulatory authorities that could have a material effect on the group and parent Council financial statements in the event of non-compliance.
- iv We acknowledge our responsibility for the design, implementation and maintenance of internal control to prevent and detect fraud.
- v Significant assumptions used by us in making accounting estimates, including those measured at fair value, are reasonable.
- vi Except as disclosed in the group and parent Council financial statements:
 - a there are no unrecorded liabilities, actual or contingent
 - b none of the assets of the group and parent Council has been assigned, pledged or mortgaged

- c there are no material prior year charges or credits, nor exceptional or non-recurring items requiring separate disclosure.
- vii We confirm that we are satisfied that the actuarial assumptions underlying the valuation of pension scheme assets and liabilities for IAS19 Employee Benefits disclosures are consistent with our knowledge. We confirm that all settlements and curtailments have been identified and properly accounted for. We also confirm that all significant post-employment benefits have been identified and properly accounted for.
- viii Related party relationships and transactions have been appropriately accounted for and disclosed in accordance with the requirements of International Financial Reporting Standards and the Code.
- ix All events subsequent to the date of the group and parent Council financial statements and for which International Financial Reporting Standards and the Code require adjustment or disclosure have been adjusted or disclosed.
- x We have considered the adjusted misstatements, and misclassification and disclosures changes schedules included in your Audit Findings Report. The group and parent Council financial statements have been amended for these misstatements, misclassifications and disclosure changes and are free of material misstatements, including omissions.
- xi We have considered the unadjusted misstatements schedule included in your Audit Findings Report and attached. We have not adjusted the group and parent Council financial statements for these misstatements brought to our attention as they are immaterial to the results of the group and parent Council and its financial position at the year-end
- The group and parent Council financial statements are free of material misstatements, including omissions.
- xii Actual or possible litigation and claims have been accounted for and disclosed in accordance with the requirements of International Financial Reporting Standards.
- xiii We have no plans or intentions that may materially alter the carrying value or classification of assets and liabilities reflected in the group and parent Council financial statements.
- xiv We believe that the group and parent Council's financial statements should be prepared on a going concern basis on the grounds that current and future sources of funding or support will be more than adequate for the group and parent Council's needs. We believe that no further disclosures relating to the group and parent Council's ability to continue as a going concern need to be made in the financial statements.

Information Provided

- xv We have provided you with:
- a. access to all information of which we are aware that is relevant to the preparation of the group and parent Council financial statements such as records, documentation and other matters;

- b. additional information that you have requested from us for the purpose of your audit; and
 - c. unrestricted access to persons within the Council from whom you determined it necessary to obtain audit evidence.
- xvi We have communicated to you all deficiencies in internal control of which management is aware.
- xvii All transactions have been recorded in the accounting records and are reflected in the group and parent Council financial statements.
- xviii We have disclosed to you the results of our assessment of the risk that the group and parent Council financial statements may be materially misstated as a result of fraud.
- xix We have disclosed to you all information in relation to fraud or suspected fraud that we are aware of and that affects the group and parent Council and involves:
 - a. management;
 - b. employees who have significant roles in internal control; or
 - c. others where the fraud could have a material effect on the group and parent Council financial statements.
- xx We have disclosed to you all information in relation to allegations of fraud, or suspected fraud, affecting the group and parent Council's financial statements communicated by employees, former employees, analysts, regulators or others.
- xxi We have disclosed to you all known instances of non-compliance or suspected non-compliance with laws and regulations whose effects should be considered when preparing financial statements.
- xxii We have disclosed to you the identity of the group and parent Council's related parties and all the related party relationships and transactions of which we are aware.
- xxiii We have disclosed to you all known actual or possible litigation and claims whose effects should be considered when preparing the group and parent Council financial statements.

Annual Governance Statement

- xxvi We are satisfied that the Annual Governance Statement (AGS) fairly reflects the Council's risk assurance and governance framework and we confirm that we are not aware of any significant risks that are not disclosed within the AGS.

Narrative Report

- i The disclosures within the Narrative Report fairly reflect our understanding of the group and parent Council's financial and operating performance over the period covered by the group and parent Council financial statements.

Approval

The approval of this letter of representation was minuted by the Council's Audit Panel at its meeting on 12 July 2018.

Yours faithfully

Name.....

Position.....

Date.....

Name.....

Position.....

Date.....

Signed on behalf of the Governing Body

Agenda Item 13

COUNCIL		
Report Title	Appointments	
Key Decision		Item No.
Ward		
Contributors	Chief Executive (Head of Business & Committee)	
Class	Part 1	Date: July 18 2018

Appointments

(1) Appointments Committee

Recommendation

That the membership of the Appointments Committee be confirmed as comprising the following members:

Councillor Bill Brown

Councillor Liz Johnston-Franklin

Councillor Jacq Paschoud

2 members of the Cabinet appointed by the Mayor on a meeting by meeting basis

(2) Lewisham Homes Board

Recommendation

That the Mayor's decision to vary the Council's representation on the Board as shown below be noted:

Councillor Caroline Kalu to replace Councillor Aisling Gallagher.

(3) Public Accounts Select Committee

The Council will be asked to adjourn for consideration of this appointment and a separately summoned meeting of the Overview & Scrutiny Committee will be asked to consider the following change to the membership of the Public Accounts Select Committee.

Recommendation

Councillor Patrick Codd to replace Councillor Bill Brown (who reverts to being an Ex Officio member of the Select Committee)

COUNCIL		
Report Title	Local Democracy Review	
Key Decision	n/a	Item No.
Ward	All	
Contributors	Head of Law	
Class	Part 1	Date: 18 July 2018

1. Summary

This report proposes the establishment of a Democracy Review Working Group to provide recommendations to Council about how the Council could enhance openness and transparency, further developing public involvement in Council decisions and promoting effective decision-making. It suggests terms of reference for the Working Group, its composition, a methodology for its work and an indicative timetable for its report. It asks the Council to appoint the Working Group with immediate effect and that it should cease to exist at the next Council Annual General Meeting unless the Council agrees then that it should continue beyond that date.

2. Purpose

The purpose of this report is to put in place a mechanism by which the Council can explore the possibilities for developing their openness and transparency, increasing public involvement in, and improving the effectiveness of, Council decision making. This would be consistent with the newly elected Mayor's commitment to review the Council's decision-making processes so that local people can be more involved in them. The establishment of a Local Democracy Review will begin work to make that pledge a reality. A decision to establish the Working Group now would allow this work to commence without delay, with a view to a full report to Council as early as possible in 2019 with any resultant changes to be implemented for the next municipal year or as soon as practicable thereafter.

3. Recommendations

- 3.1 To establish a Democracy Review Working Group with the composition and terms of reference set out in this report at section 5 and 6;
- 3.2 Subject to agreement to Recommendation 3.1, to agree that in conducting its work the Working Group should use the methodology set out in

paragraph 7 of this report, with discretion to use such other research methods it considers appropriate.

- 3.3 To agree that if the recommendations of the Working Group would entail changes to the practices of the Council that would require constitutional change, such changes should be referred to the Council's Constitution Working Party.
- 3.4 That a report containing the recommendations of the Working Group and the comments of the Constitution Working Party should be presented to the Council as early as possible in 2019 with a view to their implementation in the next municipal year or as soon as possible thereafter.

4. Background

- 4.1 The Council's governance arrangements were put in place in 2002 when Lewisham was one of the first authorities in the country to elect a directly elected Mayor. Since then, though there have been changes made to reflect legislation, as well as the taking on of additional Local Government responsibilities, there has not been a holistic review of the way in which the Council operates since then. The Council has also reduced considerably in size following massive Government cuts of £165 million to Council budgets over the past 8 years. With the election of a new Mayor and Council in 2018, all of whom are committed to democracy, openness and transparency, the time is ripe for a review as to how Council might promote more effective decision-making.
- 4.2 In addition, throughout the last 16 years, the borough has changed. Lewisham's population has increased significantly from 250,000 people in 2001 to over 310,000 today; over the next 10 years the population is forecast to grow to nearly 350,000. Whilst the number of households across the borough have increased, so too have housing pressures, with homelessness a major crisis. The number of households living in temporary housing has increased from 1,200 in 2013 to almost 1,950 in 2018. Since 2001, the private rental sector has also doubled in size; it now consists of more than 30,000 homes and makes up more than 25% of households in the borough. The need now for more homes and those that are genuinely affordable has become acute. The borough is also much more diverse today than in 2001 with approximately 46% of our residents coming from Black, Asian and minority ethnic households, rising to 76% for the school population. Such dynamic change affecting our borough drives us to look for ever more innovative ways to affect people's engagement and influence on our democratic processes.

- 4.3 Given these two factors, it is proposed that the Council explore how the decision making of the Council might be refreshed to become more effective, involve local people more and inspire confidence in the Council's decisions among the community.
- 4.4 To conduct this work will take a concerted effort and so it is proposed that a Democracy Review Working Party be established to give impetus to it.

5 Terms of reference

It is proposed that a Democracy Review Working Group be established with the following terms of reference:-

“To make recommendations to Council about how the Mayor and Council could enhance their openness and transparency, further developing public involvement in Council decisions and promoting effective decision making.”

6 Membership

It is proposed that the Democracy Review Working Group should consist of 8 members of the Council.

7. Methodology

- 7.1 In view of the extent of the work involved to complete a meaningful review within a tight timescale, it is proposed that key elements of the Working Group's methodology be agreed at this early stage. The purpose of doing so is not to inhibit the working of the Working Group, but to ensure that preliminary work can begin as soon as possible at its first meeting.
- 7.2 It is also proposed that the Working Group should be free to deploy any other investigative methods it considers appropriate so long as the use of any such additional methods does not adversely affect the timing of the Working Group's final report.
- 7.3 The proposed methodology is as follows:-
- a) A review of the Council's current arrangements to involve residents.
 - b) A review of the methods used by other authorities to involve residents.
 - c) A review of methods used by other authorities to promote openness and transparency in Council decision-making.
 - d) Consultation with Overview and Scrutiny members about how to develop councillor participation in the scrutiny process

- e) Engagement with the Local Assemblies programme to explore best practice and the role of Assemblies in engaging with residents.
- f) Engage the public, especially members of the public who are less likely to be aware or able to participate in the review, and other stakeholders through the implementation of a communications and engagement plan to be agreed by the Working Group, including web based consultation.
- g) Receive evidence from stakeholders with an interest related to the subject of the review, keeping a record of submissions.
- h) Consult the Mayor and Cabinet on any recommendations made and formulate recommendations for full Council, which incorporate advice on all relevant implications (including equalities, environmental, service, financial, legal and any other relevant matters).

8. Indicative timescales

It is proposed that the Working Group be established with immediate effect, that preparatory work take place over the summer months and that the review be publicly launched in September 2018. An evidence gathering period would follow between September and December with a report to Council as soon as possible thereafter, possibly in February 2019, with implementation of any changes as soon as practicable after that.

9. Legal implications

- 9.1 The Council has the power to establish the Democracy Working Group as proposed, and it is a non-executive function to do so. The Working Group will not have formal decision-making powers save to make recommendations to Council. Any changes to the Council's constitution which may be required as a result of the Council's decision about the recommendations of the Working Group will be the subject of a further report to Council.
- 9.2 The Equality Act 2010 (the Act) introduced a public sector equality duty (the equality duty or the duty). It covers the following protected characteristics: age, disability, gender reassignment, marriage and civil partnership, pregnancy and maternity, race, religion or belief, sex and sexual orientation.
- 9.3 In summary, the Council must, in the exercise of its functions, have due regard to the need to:
 - eliminate unlawful discrimination, harassment and victimisation and other conduct prohibited by the Act.
 - advance equality of opportunity between people who share a protected characteristic and those who do not.
 - foster good relations between people who share a protected characteristic and those who do not.

- 9.4 It is not an absolute requirement to eliminate unlawful discrimination, harassment, victimisation, or other prohibited conduct, or to promote equality of opportunity or foster good relations between persons who share a protected characteristic and those who do not. It is a duty to have due regard to the need to achieve the goals listed in the paragraph above.
- 9.5 The weight to be attached to the duty will be dependent on the nature of the decision and the circumstances in which it is made, bearing in mind the issues of relevance and proportionality. The Mayor must understand the impact or likely impact of the decision on those with protected characteristics who are potentially affected by the decision. The extent of the duty will necessarily vary from case to case and due regard is such regard as is appropriate in all the circumstances.
- 9.6 The Equality and Human Rights Commission has issued Technical Guidance on the Public Sector Equality Duty and statutory guidance entitled “Equality Act 2010 Services, Public Functions & Associations Statutory Code of Practice”. The Council must have regard to the statutory code in so far as it relates to the duty and attention is drawn to Chapter 11, which deals particularly with the equality duty. The Technical Guidance also covers what public authorities should do to meet the duty. This includes steps that are legally required, as well as recommended actions. The guidance does not have statutory force but nonetheless regard should be had to it, as failure to do so without compelling reason would be of evidential value. The statutory code and the technical guidance can be found at:
- <https://www.equalityhumanrights.com/en/advice-and-guidance/equality-act-codes-practice>
- <https://www.equalityhumanrights.com/en/advice-and-guidance/equality-act-technical-guidance>
- 9.7 The Equality and Human Rights Commission (EHRC) has previously issued five guides for public authorities in England giving advice on the equality duty:
- [The essential guide to the public sector equality duty](#)
 - [Meeting the equality duty in policy and decision-making](#)
 - [Engagement and the equality duty: A guide for public authorities](#)
 - [Objectives and the equality duty. A guide for public authorities](#)
 - [Equality Information and the Equality Duty: A Guide for Public Authorities](#)
- 9.8 The essential guide provides an overview of the equality duty requirements including the general equality duty, the specific duties, and who they apply to. It covers what public authorities should do to meet the duty including steps that are legally required, as well as recommended actions. The other four documents provide more detailed guidance on key areas and advice on good practice. Further information and resources are available at:

<https://www.equalityhumanrights.com/en/advice-and-guidance/public-sector-equality-duty-guidance#h1>

10. Financial implications

An allocation of £10,000 has been earmarked from corporate resources to cover any necessary expenses associated with this review.

11. Equalities implications

The establishment of the Working Group would be designed to try to identify ways in which the diverse people of Lewisham, including those with protected characteristics, can be involved more in Council processes. In carrying out their work, the Working Group will have to be mindful of the Council's public sector equality duty as set out in Para 9.2 et seq. and advice will be given on any specific recommendations at the appropriate time.

12. Environmental implications

There are none arising from this report, though there may be some arising from any suggestions made by the Working Group if established. Advice would be given at the relevant time.