

Overview and Scrutiny



Public Accounts Select Committee Agenda

Thursday, 2 February 2023

7.00 pm, Civic Suite

Civic Suite

Lewisham Town Hall

London SE6 4RU

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This meeting is an open meeting and all items on the agenda may be audio recorded and/or filmed.

Part 1

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The public are welcome to attend committee meetings. However, occasionally, committees may have to consider some business in private. Copies of reports can be made available in other formats upon request

Public Accounts Select Committee

Members

Members of the committee, listed below, are summoned to attend the meeting to be held on Thursday, 2 February 2023.

Jeremy Chambers, Monitoring Officer
Wednesday, 25 January 2023

Members	
Councillor James Rathbone (Chair)	
Councillor Rudi Schmidt (Vice-Chair)	
Councillor Eva Kestner	
Councillor Joan Millbank	
Councillor John Paschoud	
Councillor Eva Stamirowski	
Councillor Susan Wise	
Councillor Mark Ingleby (ex-Officio)	
Councillor Ese Erheriene (ex-Officio)	

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Agenda Item 1

**Minutes of the
Public Accounts Select Committee
Thursday, 1 December 2022 at 7.00pm**

In attendance: Councillors James Rathbone (Chair), Joan Millbank, John Paschoud, Eva Stamirowski, Susan Wise and Mark Ingleby

Apologies: Councillors Rudi Schmidt and Eva Kestner

Also present: Councillor Liz Johnston-Franklin, Councillor Luke Sorba (Chair of the Children and Young People Select Committee) Timothy Andrew (Scrutiny Manager), Jennifer Daothong (Executive Director for Housing, Regeneration and Public Realm) and Kathy Freeman (Executive Director for Corporate Resources)

Also present virtually: Councillor Chris Best (Chair of Healthier Communities Select Committee), Councillor Edison Huynh (Vice Chair of Sustainable Development Select Committee), Councillor Ayesha Lahai-Taylor (Chair of Safer Stronger Communities Select Committee), Councillor Chris Barnham (Cabinet Member for Children's Services and School Performance), Councillor Amanda De Ryk (Cabinet Member for Finance and Strategy), Tom Brown (Executive Director for Community Services), Jeremy Chambers (Director of Law and Corporate Governance), Pinaki Ghoshal (Executive Director for Children and Young People), Salena Mulhere (Assistant Chief Executive), Katharine Nidd (Head of Strategic Finance, Planning and Commercial), Nick Penny (Head of Service Finance) and Kim Wright (Chief Executive)

NB: Those Councillors listed as joining virtually were not in attendance for the purposes of the meeting being quorate, any decisions taken or to satisfy the requirements of s85 Local Government Act 1972

1. Minutes of the meeting held on 22 September 2022

- 1.1 **Resolved:** that the minutes of the meeting held on 22 September be agreed as an accurate record.

2. Declarations of interest

- 2.1 The following interests were declared:

- Councillor Wise declared an interest as a board member of Lewisham Homes.
- Councillor John Paschoud declared interests as: a co-operative governor of Parkwood Hall co-operative academy, which is in receipt of funding from Lewisham Council; as a Council appointee to the London Road Safety Council (as well as elected Vice-Chair); and the spouse of a Trustee of the Ravensbourne Project (which provides short breaks for children and young people)
- Councillor Huynh declared an interest as a board member of Youth First.
- Councillor Rathbone declared an interest as an employee of a Lewisham library (although not one of those run directly by the Lewisham library service).

3. Responses from Mayor and Cabinet

- 3.1 There were none.

4. Financial monitoring

- 4.1 Nick Penny (Head of Service Finance) introduced the report – noting the £18.3m variance in the general fund budget – and that this variance had been offset by **Page 3**

£4m of covid grant funding and £8m of corporate pressure/reserve funding – leaving a forecast budget overspend of £5.6m. Nick further outlined areas of pressure and highlighted the requirement to achieve savings proposals.

4.2 Nick Penny, Pinaki Ghoshal (Executive Director for Children and Young People) and Kathy Freeman (Executive Director for Corporate Resources) responded to questions from the Committee – the following key points were noted:

- More detailed work was required to verify the accuracy of the figures being used to track spending pressures in children's services.
- Deficits in the high needs block of the dedicated schools grant were being monitored and managed in coordination with the schools forum.
- The adult social care improvement programme was forecasting savings of £1.1m for the year.
- The report provided figures up until the end of October 2022 – information in the section on the capital programme would be updated.

4.3 **Resolved:** that the report be noted.

5. Budget reductions report

5.1 Councillor Amanda de Ryk (Cabinet Member for Finance and Strategy) introduced the item – highlighting the pressures facing the Council and the ongoing strain on financial services. Councillor de Ryk noted that the Council would need to either take the cuts being proposed or identify others in order to balance its budgets.

5.2 Kim Wright (Chief Executive) addressed the Committee – noting the importance of the cuts programme and emphasising the challenging decisions facing the Council.

5.3 Kathy Freeman introduced the report – noting the uncertain financial climate as well as pressures facing residents and Council services. Kathy emphasised the challenging financial situation for the Council - following on from more than a decade of cuts and pressures. She highlighted the process for scrutinising and agreeing the cuts proposals as well as the timing for the local government finance settlement.

5.4 Councillors Lahai-Taylor, Huynh and Sorba were invited to comment on the proposal to reduce library opening hours (COM_SAV_08). They highlighted their respective select committees' concerns about the impact of this cuts proposal, particularly on the most vulnerable residents.

5.5 Tom Brown (Executive Director for Community Services) was invited to address the Committee regarding the library service proposal. Tom noted the difficulty facing the Council in making cuts and highlighted potential mitigations that would be in place.

5.6 Tom Brown responded to questions from the Committee – the following key points were noted:

- Work was taking place to improve the offer from the library service so that libraries would offer a broader range of activities and support for local communities.
- Officers had been considering the best way to implement the proposal to minimise its overall impact.

5.7 Members discussed the library services proposal – noting the difficulty facing the Council in balancing its budget whilst expressing concern about the bluntness of

the proposal to reduce hours uniformly across all of the libraries. The Committee noted that the different libraries had different running costs, levels of footfall and facilities. Members considered whether the proposal could be implemented strategically to in order to minimise its impact.

- 5.8 Councillor Sorba was invited to address the Committee regarding other cuts that had been referred by the Children and Young People Select Committee (CYP_SAV_01 – Review of Children Centres Budgets and CYP_SAV_04 – Youth Services Budget Review). Cllr Sorba emphasised the Committee's concern about the unintended consequences of reducing preventative services – and recommended delaying the decision on the cuts until further information was available regarding the local government finance settlement and the outcome of a recent OFSTED inspection.
- 5.9 Pinaki Ghoshal was invited to address the Committee regarding the proposals and the referral from the Children and Young People Select Committee. Pinaki highlighted the changes in funding that were anticipated (over a three year period) – which would likely result in increased funding for the proposed hub model. He also noted that work was taking place with Youth First to ensure that it increased its funding from additional sources, making it less reliant on its contract with the Council.
- 5.10 Councillor Best was invited to address the Committee regarding other cuts that had been referred by the Healthier Communities Select Committee - sexual and reproductive health services in primary care (COM_SAV_10) the adult social care, Empowering Lewisham Programme (COM_SAV_04) and reassessment of Care plans (COM_SAV_03).
- 5.11 Tom Brown was invited to address the Committee regarding the proposals and the referral by the Healthier Communities Select Committee. Tom noted the changing behaviour in the uptake of sexual health services. He also noted the careful process being followed to ensure that savings from adult social care services were not being double counted and provided additional information about the aims of the programme. Tom also acknowledged the challenges facing all residents from the cost of living crisis – including the most vulnerable residents in social care.
- 5.12 The Committee considered each of the remaining savings proposals – seeking clarification on specific measures and further details about options for implementation on several items. There was an extended discussion on the proposal relating to the road safety service (HRPR_SAV_02) – in which members discussed the options for further scrutiny of the proposal.
- 5.13 In Committee discussions the following key points were also noted:
- Members expressed concern about the pressures facing Council officers in making savings proposals and managing increasing demands.
 - Members questioned whether there were areas of Council service delivery that would have to cease due to the difficulty in recruiting to some posts and sustained pressures on budgets.
- 5.14 Councillor de Ryk and Kim Wright responded to Committee discussions – noting their thanks to the Committee for their scrutiny of the proposals – and recognising the pressures facing staff.
- 5.15 **Resolved:** that the Committee would refer its views to Mayor and Cabinet as follows –
- The Committee welcomes the careful consideration given to the budget

reduction proposals by the Healthier Communities; Safer Stronger; Children and Young People and Sustainable Development select committees. It is also grateful for the attendance of select committee chairs and vice-chairs as well as senior officers at the Public Accounts Select Committee meeting to share member views and officer responses on the proposals.

- The Committee notes that the setting of a balanced budget for 2023/23 is essential to ensuring the ongoing financial viability of the Council and it recognises that there are sustained budget pressures and unfunded costs in a number of areas. Therefore, it is with reluctance that the Public Accounts Select Committee endorses these budget reduction proposals. Members believe that it would be irresponsible to recommend that these proposals should be dropped or delayed.
- In relation to comments and questions on the proposal to reduce opening hours at libraries (**COM_SAV_08**) the Committee notes and welcomes the comments from members of the other select committees. Public Accounts Select Committee recommends that officers be tasked with a strategic overview of the operation of the service – which should include consideration of the best means of making this saving whilst minimising the impact on residents. The Committee believes that this should include consideration of the hours of operation, footfall and usage levels across the service as well as careful consultation with library users.
- The Committee also wishes to place on record its appreciation and thanks for the work of Council officers. Members are concerned about considerable budgetary and operational pressures - as well as levels of vacancies across the organisation. Commenting on proposals to manage pay inflation and to restructure senior management (**All_SAV_01 and ALL_SAV_02**) the Committee emphasised its worry that the amalgamation of responsibilities would have a further detrimental impact on staff wellbeing and welfare.

6. Select Committee work programme

- 6.1 Members considered the work programme for its upcoming meeting – noting that the date of the meeting might change.
- 6.2 **Resolved:** that the agenda for the upcoming meeting be agreed.

The meeting ended at 9.30 pm

Chair:

Date:



Public Accounts Select Committee

Declarations of Interest

Date: 2022-23

Key decision: No

Class: Part 1 (not restricted)

Ward(s) affected: All (none specific)

Contributor: Jeremy Chambers (Director of Law, Governance and Elections)

Outline and recommendations

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

1. Summary

- 1.1. Members must declare any personal interest they have in any item on the agenda. 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.
- 1.2. Further information on these is provided in the body of this report.

2. Recommendation

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

3. Disclosable pecuniary interests

3.1 These 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.

4. Other registerable interests

4.1 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.

5. Non registerable interests

- 5.1. 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).

6. Declaration and impact of interest on members' participation

- 6.1. 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 not 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**
- 6.2. 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 6.3 below applies.
- 6.3. 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.
- 6.4. 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.
- 6.5. 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.

7. Sensitive information

- 7.1. 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.

8. Exempt categories

8.1. 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).

9. Report author and contact

9.1. Jeremy Chambers, Director of Law, Governance and Elections - [Jeremy
Chambers@lewisham.gov.uk](mailto:Jeremy.Chambers@lewisham.gov.uk), 020 83147648



Public Accounts Select Committee

Road Safety Service Review

Date: 2 February 2023

Key decision: No.

Class:

Ward(s) affected: All

Contributors:

Paul Boulton, Interim Director for Public Realm

Outline and recommendations

This report provides Members of the Public Accounts and Select Committee with details of proposed measures to deliver savings in 2023/24 and 2024/25 in connection with the Road Safety Service review. It follows a decision of the Overview and Scrutiny Business Panel on 20 December 2022, which met to consider decisions taken at the meeting of the Mayor and Cabinet held on 7 December 2022.

In particular, the report seeks to provide Members of the Committee with further details of the likely impacts on the school crossing patrol service brought about by the review; how these changes would be implemented and what measures could be put in place to mitigate against any potential increased risks to road safety associated with the proposed budget reductions.

The proposal is required to support the Council in delivering a balanced budget in 2023/24.

Members of Public Accounts Select Committee are recommended to note and comment on the contents of this report.

Timeline of engagement and decision-making

7 December 2022 – Budget Cuts Report to Mayor and Cabinet.

20 December 2022 – Budget reduction proposal to Overview Scrutiny and Business Panel.

2 February 2023 – Budget reduction proposal to Public Accounts Select Committee

1 Summary

- 1.1 A review of the Road Safety Service is required to deliver the budget reductions agreed by Mayor & Cabinet on 7th December 2022. The review seeks to deliver savings of £140,000 over a two-year period commencing in 2023/24 to support the Council in delivering a balanced budget.
- 1.2 The Road Safety Service comprises of 3 officers focussed on delivery of road safety education, training and behaviour change activities along with 21 school crossing patrol (SCP) staff in post. A further 7 SCP posts are vacant. School crossing patrols are employed 10 hours per week, term time only.
- 1.3 The role of a school crossing patrol is to aid primary school children and their parents, along with other pedestrians who wish to use the facility, in crossing busy roads on the way to and from school. Parents however remain ultimately responsible for ensuring their children's safety.
- 1.4 Provision of SCPs is regulated by legislation and is underpinned by national best practice guidance issued by Road Safety GB. The establishment of a SCP site is normally only approved if they meet the criteria set down in the national guidance.
- 1.5 In line with the guidance, it is best practice to regularly review existing SCP sites to see that they still meet the national criteria and consider whether to discontinue sites that do not. A site may also be discontinued if it is being replaced by a controlled pedestrian crossing or other engineering scheme such as a School Street. Any decision to withdraw a SCP site may generate concern and criticism from the school and parents, therefore, SCP sites should normally only be discontinued following a review, and the reasons should be clearly explained. A table listing all 28 SCP sites is shown in Section 3 below.
- 1.6 Whilst the review that has been proposed will cover all aspects of the road safety service, unlike aspects of road safety education and training, the provision of school crossing patrols is something which the Council has the power to provide but they are not under any obligation to do so, therefore it is likely that the focus of any resulting budget reductions will be centred on the school crossing patrol function.
- 1.7 A proposal to reduce the school crossing patrol service was considered in March 2019. At that time, Mayor and Cabinet agreed that further work was required to establish the full implications of what could be achieved and the risks around such savings being taken. Since 2019, work on this proposal has focussed on a three-stage risk-managed approach:
 - Firstly, by undertaking a professional assessment of each SCP site based on the national guidance alongside consideration of appropriate measures to mitigate against any potential risk following the loss of a school crossing patrol.
 - Secondly, for sites that meet the national criteria the review sought to maximise opportunities to deliver physical mitigation measures through ongoing capital programmes such as School Streets, which can effectively remove the need for a SCP.
 - Thirdly, for sites that meet the national criteria and fall outside potential intervention programmes, sites have been reviewed for possible introduction of push-button signal controlled crossings and other appropriate mitigation measures.
- 1.8 A summary of the risk managed approach to enable delivery of the budget reductions is detailed in Section 3 below. Also, Appendix A, which provides details of the likely mitigation measures proposed for each site. It is not possible however at this stage to provide a detailed scheme layout for each location as further site investigations and design work will be required.

- 1.9 The mitigation measures would be funded through existing work programmes like School Streets, LIP or other appropriate capital funding streams to deliver the measures in a phased approach over a two-year period. Based on the level of potential mitigation identified in Section 3, the capital cost is likely to be approximately £500,000 over the two years.
- 1.10 Following implementation of the mitigation measures, if any school remains keen to retain the SCP and willing to fund the running costs, it may be possible through a Service Level Agreement (SLA) between the School and the Council to retain an SCP facility on an individual basis.

2 Purpose and Recommendations

- 2.1 The purpose of this report is to set out details of the likely impacts on the school crossing patrol service resulting from the Road Safety Service review; how these changes will be implemented and what measures could be put in place to mitigate against any potential increased risks to road safety associated with the proposed budget reductions.
- 2.2 Members of Public Accounts Select Committee are recommended to note and comment on the contents of this report.

3 Background

3.1 Overview of the Road Safety Service

- 3.1.1 The Road Safety Service delivers a programme of measures to support Transport for London's Vision Zero ambition that no one should be killed or seriously injured on the road by 2040.
- 3.1.2 The key functions and activities delivered by the service include: -
 - School Crossing Patrols
 - School Travel Plan programme
 - Cycle Training and Cycling supporting measures
 - School Streets Programme
 - Road Safety Education and training
- 3.1.3 There are currently 3 full time officers focussed on delivery of road safety education, training and behaviour change activities along with 21 school crossing patrol (SCP) staff in post across the service. A further 7 SCP posts are vacant. School crossing patrols are employed 10 hours per week, term time only.

3.2 School Crossing Patrols

- 3.2.1 The role of a school crossing patrol is to aid primary school children and their parents, along with other pedestrians that wish to use the facility, in crossing busy roads on the way to and from school. The service, which the Council has a power to provide rather than a duty to do so, has been a Local Authority function since being transferred from the Metropolitan Police in April 2000.
- 3.2.2 Where a SCP is provided, parents remain ultimately responsible for ensuring their children's safety with the SCP being essentially a road crossing facility, which is one of many traffic management options available to the Council as Highway Authority, alongside facilities such as zebra and puffin crossings, to enhance safety and encourage more sustainable forms of travel to and from school.

- 3.2.3 Provision of SCPs is regulated by legislation and is underpinned by national best practice guidance issued by Road Safety GB. The national guidance has been compiled based on existing legislation, best practice, health and safety and case law and covers all aspects of a School Crossing Patrol Service, including operational procedures and criteria for their establishment and continued operation.
- 3.2.4 The establishment of a SCP site is normally only approved if they meet the criteria set down in the national guidance. This includes factors such as: the number of children walking to and from school and traffic flows at the site in question. Other factors are also considered such as carriageway width, forward visibility, speed of vehicles, accident history and street lighting.
- 3.2.5 In line with the guidance, it is best practice to regularly review existing SCP sites at least once every two years against the adopted criteria, or more frequently if circumstances change, for example, if a school closes, following the introduction of a traffic management scheme or the retirement of a patrol.
- 3.2.6 A review may reveal that a site no longer meets the criteria or that it has been vacant for a long period, and it has proved impossible to find someone to work as a SCP at the site. In this case, a decision may be made whether to decommission the site.
- 3.2.7 Sometimes, a site may also be decommissioned because it is being replaced by a zebra or light controlled crossing, other engineering measures or by changes related to a School Streets project. Any decision to withdraw a SCP site may generate concern and criticism from the school and parents, therefore, SCP sites should only be discontinued following a review, and the reasons should be clearly explained.

3.2.8 A list of all 28 current SCP sites is shown in Table 1 below.

SCP Location	School	Ward	Occupied/ Vacant
Adamsrill Road	Adamsrill	Perry Vale	Vacant
Baring Road / Linchmere Road	Baring	Grove Park	Vacant
Brockley Road	Beecroft	Crofton Park	Occupied
Perry Vale	St George's	Perry Vale	Vacant
Upwood Road / Leyland Road	Colfes (Lower)	Lee Green	Occupied
Brockley Rise	Dalmain	Crofton Park	Occupied
Honor Oak Road	Fairlawn	Forest Hill	Occupied
Friendly Street / Albyn Road	St Stephens	Brockley	Occupied
Ladywell Road	Gordonbrock	Ladywell	Occupied
Edward Street	Grinling Gibbons	Evelyn	Occupied
Hither Green Lane/ Beacon Rd	Brindishe Green	Lewisham Central	Occupied
Southvale Road	John Ball	Blackheath	Vacant
Mantle Road	John Stainer	Telegraph Hill	Occupied
St. Asaph Road	John Stainer	Telegraph Hill	Occupied
Kirkdale	Kelvin Grove	Forest Hill	Occupied
Cranston Road	Kilmorie	Perry Vale	Occupied
Manor Lane / Southbrook Road	Brindishe Manor	Lee Green	Occupied
Marvels Lane	Marvels Lane	Grove Park	Occupied
Sydenham Road	Our Lady and St Philip Neri	Sydenham	Occupied
Manwood Road	Prendergast Ladywell	Crofton Park	Vacant
Rangefield Road / Glenbow Rd.	Rangefield	Downham	Occupied
Downham Way	Rangefield	Downham	Vacant
Catford Hill/ Woolstone Road	Rathfern	Rushey Green	Occupied
Sandhurst Road	Sandhurst	Catford South	Occupied
Westwood Hill / Amberley Grove	Sydenham High	Sydenham	Occupied
Torridon Road / Hazelbank Rd.	Torridon	Catford South	Vacant
Giffin Street	Tidemill	New Cross	Occupied
Grinstead Road / Scawen Road	Twin Oaks	Evelyn	Occupied

Table 1: Location of existing school crossing patrol sites in Lewisham

3.3 Budget Reduction Proposals

- 3.3.1 The proposal is to carry out a review of the Road Safety Service to identify where efficiencies can be made and deliver savings of £140,000 over a two-year period to support the Council in delivering a balanced budget in 2023/24 and beyond. No consultation has yet been carried out with staff concerned and this would be undertaken in line with the Council's HR policies and procedures once final approval has been given to proceed with the review.
- 3.3.2 Although the Council as Highway Authority has statutory duties linked to improving road safety, including education and training, the provision of school crossing patrols is a non-statutory function. To achieve the budget reductions required to support the Council to deliver a balanced budget, it is likely therefore that the focus of these budget reductions may be centred on the school crossing patrol function.
- 3.3.3 A proposal to reduce the school crossing patrol service was considered in March 2019. At that time, Mayor and Cabinet agreed that further work was required to establish the full implications of what could be achieved and the risks around such savings being taken.
- 3.3.4 Since 2019, work on this proposal has focussed on a three-stage risk-managed approach. Firstly, by undertaking a professional assessment of the need for a SCP at each site based on the national guidance, alongside consideration of appropriate measures to mitigate any potential added risk following the loss of a school crossing patrol. Secondly, for sites that meet the national criteria the review sought to maximise opportunities to deliver physical mitigation measures through ongoing capital programmes such as School Streets, which effectively remove the need for a SCP. Thirdly, for sites that meet the national criteria and fall outside potential intervention programmes, the review assessed sites for possible introduction of push-button signal controlled crossings and other mitigation measures.

3.4 A risk-managed approach to deliver the budget reductions

- 3.4.1 As part of stage 1 of the risk-managed approach, traffic surveys were undertaken at each of the 28 SCP sites to establish the speed and volume of traffic, and the number of pedestrians crossing the road. This was followed up by site audits to survey the carriageway and footway widths, gradients (which affect stopping distances) and to make an assessment of site-based risk factors such as visibility. This enabled a professional judgement to be made by independent consultants on whether existing sites meet the national guidance for a SCP facility as set out by Road Safety GB. The result of this assessment indicated that 6 of the 28 sites were considered as 'not required' as they do not meet the national criteria.
- 3.4.2 The 6 sites identified as not meeting the national criteria were:
- Adamsrill School, Adamsrill Road (a School Street since April 2021)
 - Grinling Gibbons School, Edward Street (on existing raised zebra crossing)
 - John Ball School, Baizdon Road (a School Street since April 2021)
 - Rangefield School, Glenbow Road (proposed School Street in Feb/Mar 2023)
 - St Stephens C of E School, Friendly Street (potential School Street – date tbc)
 - Tidemill Academy, Giffin Street (potential inclusion into adjacent School Street – date tbc)

- 3.4.3 Of the sites above that are within an existing School Street, namely Adamsrill School and John Ball School, a SCP is no longer required and has been relocated where possible to a vacant site elsewhere in the borough. Similarly, when the proposed School Streets are introduced at Rangefield School, St. Stephen's and Tidemill Academy, it is anticipated that the SCP's will be withdrawn as they will no longer be necessary. In terms of Grinling Gibbons School the pedestrian and vehicle surveys would be repeated to ensure there have been no major changes in flow since the last survey. Assuming there have not, a School Street is not currently feasible at this location, therefore in addition to the existing raised zebra crossing other remedial measures would be implemented instead, along with a package of mitigation and information for schools and parents.
- 3.4.4 Part 2 of this risk-managed approach is to identify where sites can be aligned with future work programmes to link opportunities to reduce the risks sufficiently to enable the discontinuation of further sites. Examples would include the Council's award-winning Schools Streets Programme, Healthy Neighbourhoods initiatives and the proposed phased borough-wide roll-out of the Sustainable Transport and Parking Improvements Programme, which recently went out to public consultation. We will also incorporate the mitigation into any LIP funded road safety schemes to reduce the levels of road injury collisions in the vicinity of the sites. Such initiatives, along with additional mitigation as required, have the potential to remove through traffic sufficiently or improve overall safety to warrant the potential removal of a fixed SCP facility.
- 3.4.5 Part 3 of this approach has looked at the remaining sites to assess the measures necessary to mitigate against any potential increased risk following the removal of a SCP. Any mitigation would be based on a risk managed approach using a range of indices including average speeds, volume of pedestrians, traffic flows, road collision history and other mitigations already in place. Where feasible to do so this will include the introduction of zebras or push-button light controlled crossings, which would have the added benefit of being a permanent measure to improve safety rather than a facility that is only available for a few hours a week.
- 3.4.6 It is not possible at this stage to provide a definitive scheme layout of the mitigation proposed for each location until further site investigations and design work have been carried out to assess any engineering constraints. During the next stage, this will include detailed investigations such as topographical surveys, statutory undertaker searches, traffic signal design and lighting assessments etc. which will be required to develop the proposed scheme layouts through detailed design.
- 3.4.7 SCPs and light-controlled crossings fulfil the same purpose (they stop traffic so pedestrians may cross the road safely) and therefore, having both in place at the same site is not only a duplication of resources it can also be confusing to drivers. For this reason, national best practice guidance issued by Road Safety GB recommends that SCPs should not be located on light-controlled crossings. Instead, road safety enforcement, education or pedestrian training at the school in question may help to address any concerns.
- 3.4.8 It is worth noting that with the exception of some Transport for London routes, all roads within Lewisham have a speed limit of 20 mph. Whilst speed compliance on some roads is still an issue of concern, we will continue to work with the Police and other partners to seek the behaviour change necessary to support safer and more healthy neighbourhoods in line with the Vision Zero ambition. The recent launch of the Sustainable Transport and Parking Improvements Programme will also provide an opportunity to re-imagine the look and feel of our roads and streets to encourage more people to walk and cycle, to reduce the dominance of the car and improve safety.
- 3.4.9 The mitigation measures to be implemented prior to the removal of school crossing patrols, such as School Streets and push-button light controlled crossings, will also play a part in making our neighbourhoods safer. Measures including light controlled crossings will have the added benefit of being available 24 hours a day every day of the year rather than for 10 hours a week during school term time only, which should improve overall safety and encourage more forms of active travel.

- 3.4.10 Where the provision of a SCP is stipulated in any formal planning consent for a development, the Planning Authority will be consulted to ensure that any variation or otherwise to the planning consent may take place in a timely manner prior to any discontinuation of a patrol.
- 3.4.11 Funding to implement the mitigation measures will be built into existing work programmes, for example School Streets, and other capital funding streams as required to deliver the measures in a phased approach over the next two years. Based on the level of potential mitigation identified in Section 3, the capital cost is likely to be in the region of £500,000 over the two years.
- 3.4.12 According to figures from the Department for Transport, the average cost of a road collision injury to the local economy in 2021 was more than £112,000. By improving the overall safety offering through the introduction of measures such as light controlled crossings, this should lead to fewer road collision injuries over time, more than justifying the initial capital investment.
- 3.4.13 Any mitigation would be based on a risk managed approach using a range of indices including average speeds, volume of pedestrians, traffic flows, road collision history and other mitigations already in place. Following use of a consistent risk assessment formula will ensure that those with protected characteristics and other impacted groups are not adversely impacted. Indeed, by looking to introduce permanent mitigation measures such as light controlled crossing, overall safety levels may be improved.
- 3.4.14 Subject to the introduction of the appropriate mitigation measures and outcome of a subsequent Road Safety Audit required for each site, the potential removal of the SCP could then proceed. At that stage, if any school remains keen to retain a SCP and willing to fund the running costs, it may be possible through a Service Level Agreement (SLA) between the School and the Council to retain an individual SCP facility. This approach of agreeing SLAs with schools, is a model several other London boroughs have used when cutting Council funding for the school crossing patrol service.

4. Summary of potential mitigation

- 4.1 Using this risk-managed approach to the review, a brief summary of the potential mitigation measures to warrant the discontinuation of the patrol at each site is listed below. Further details are shown in Appendix 1 attached to this report. It is not possible however at this stage to provide a definitive scheme layout for each location until further site investigations and design work are undertaken.

Adamsril School

Adamsril School is now a school street therefore the SCP has been relocated to a vacant site. No further work would need to be carried out at this location.

Baring

The site has been vacant for several months. Additional signage on the approach to the crossing point will help to raise awareness and a raised table at the crossing point will help to ensure drivers slow down. Could also be considered for a light controlled crossing.

Beecroft

Currently a zebra crossing is in place which is due to be replaced with a light controlled crossing in 2023. In 2022 20mph speed Vehicle Activated Signs and banners were installed.

Brindishe Green

A school street has been implemented at Beacon Road, the SCP operates on a zebra crossing on Hither Green Lane. Before a SCP could be removed as a minimum there would need to be improvements to upgrade the visibility of the zebra crossing, including a raised table and

increased advanced signage. Speeds will also need to be checked to establish if further mitigation may be required. Could also be considered for a light controlled crossing.

Brindishe Manor

SCP site is within the Lewisham and Lee Green LTN. Traffic volume has reduced, speeds will need to be checked to establish if further mitigation is required.

Colfes

School sits within the LTN. It is also recommended to either extend the school keep clear markings or install double yellow lines to the west of the crossing up to the speed hump to improve visibility at this crossing point and install tactile paving at the crossing points.

Dalmain

The SCP site covers 2 schools, sited on a zebra crossing. Increasing visibility of the zebra crossing will be beneficial for all road users. Additional measures could include adding a raised table or considered for a light controlled crossing. The existing kerb build outs and tactile paving can be retained. Could also be considered for a light controlled crossing.

Fairlawn

This site has benefitted from improved lighting (halo lights on beacons). Plans to create a School Safety Zone are underway at this location. Could also be considered for a light controlled crossing.

Gordonbrock

The site will needs to be reviewed as part of the School Street programme review. Both Amyruth and Gordonbrock Roads are School Streets which may have increased numbers using the crossing point. Could be considered for a light controlled crossing.

Grinling Gibbons

The site has been upgraded as part of the Quietway cycle route. Other measures could be considered to upgrade the route.

John Ball

John Ball School is now a school street therefore the SCP has been removed. No further work would need to be carried out at this location.

John Stainer (Mantle Road)

Existing raised zebra. Approach signing to be enhanced. Could also be considered for a light controlled crossing.

John Stainer (St Asaph Road)

Existing raised zebra. Approach signing to be enhanced. Could also be considered for a light controlled crossing.

Kelvin Grove

There are no facilities at the crossing point, therefore mitigation measures will need to be implemented at this site. Could be considered for a zebra or light controlled crossing.

Kilmorie

SCP site is on Cranston Road, improving signage will help to raise awareness of the crossing point.

Marvels Lane

A zebra or light controlled crossing could be considered.

Our Lady and St Philip Neri

Could be considered for a zebra or light controlled crossing.

Prendergast Ladywell Fields

The option to install a formal crossing point was considered but was not feasible due to the sightlines and number of residential properties at the location. A School Street has been implemented on Ewhurst Road to protect the school gate area. As part of the improvement to Manwood Road a zebra crossing and VAZ signs were also installed. Further measures will be reviewed to improve crossing facilities and enhance the area as part of a School Safety Zone.

Rangefield

Rangefield School is due to be a school street Feb 2023 therefore the SCP has been removed. No further work will need to be carried out at this location.

Rangefield, Downderry

Changes to the crossing facility at this location should be considered in conjunction with speed compliance measures and/cycle connectivity.

Rathfern

Improved visibility of the zebra crossing will be needed due to the zebra crossing on the bend of Catford Hill. Could also be considered for a light controlled crossing

Sandhurst

As part of the School Street programme this location is in the design stage, however this would not include the SCP site on Sandhurst Road. Possible measures to widen pavements and narrow the road could be considered.

St George's

Currently a raised zebra. Could be considered for a light controlled crossing.

St Stephens

Potential School Street.

Sydenham High

Could be considered for a zebra or light controlled crossing.

Tidemill

The SCP is on long term sick leave. Additional signage will improve visibility of the crossing site. Will be considered for inclusion into adjacent School Street

Torridon

The site has been vacant for a number of years. The school have requested a School Street or measures to reduce traffic in the vicinity of the school. To be included in School Streets Programme.

Twin Oaks

A road closure at the main gate of the school was implemented as part of the Deptford Liveable Neighbourhood Project. However this is not at the location where the SCP operates. Further measures to be explored.

5. Next Steps

5.1 Subject to an agreement to proceed with the review, the proposed next steps are as follows:

- Engage with affected staff to let them know a review is underway. This will include all staff including the non-SCP elements of the service.
- Where sites have been reviewed against national guidance and no longer meet the criteria, take steps to implement the recommended next steps necessary prior to withdrawal of the SCP, including implementing appropriate mitigation where required.
- For remaining sites, to commence detailed site investigations and surveys to progress the detailed design for the required mitigation measures.
- Prior to removal of a SCP, undertake any additional surveys and analysis required, along with a Road Safety Audit for each site to assess the safety of designs and mitigation proposals. The audits will be carried out independently in line with Department for Transport guidance.
- Consult and engage as necessary with schools and parents prior to withdrawal of any patrol and also with business and residents to obtain comments and feedback on the proposed mitigation schemes.
- To undertake a review after 12 months of the effectiveness of the changes and report back the findings.

6. Financial implications

6.1 The review seeks to deliver savings of £140,000 over a two-year period commencing in 2023/24 to support the Council in delivering a balanced budget. Any one-off capital investment needed to release the savings will be identified from existing capital programmes.

7 Legal implications

7.1 The power set out in Section 26 of the Road Traffic Regulation Act 1984 enables the Council as the “appropriate authority” to provide school crossing patrols where children cross roads on their way to or from school or from one part of a school to another. Arrangements may be made at such times as the Council thinks fit. This is a power to provide rather than a legal duty to do so.

7.2 Section 39 of the Road Traffic Act 1988 requires the Council to prepare and implement a programme of measures to improve road safety and includes the power to engineer roads to make them safer.

7.3 In taking a decision to cease to continue to provide such a patrol the Council must take into account all relevant matters and disregard irrelevant matters. Where the Council undertakes consultation whether statutory or not any consultation responses must be considered by the Council with a receptive mind and it must be prepared to change course if persuaded. However there is no duty to adopt the views of consultees. For a successful challenge to be made against the Council, the decision would need to be outside the limits, which any reasonable local authority would operate.

7.4 The Equality Act 2010 (the Act) introduced a new public sector equality duty (the equality duty or the duty). It 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.

In summary, the Council must, in the exercise of its function, 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 persons who do not share it
- The duty continues to be a “have regard duty”, and the weight to be attached to it is a matter for the decision maker, 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.

- 7.5 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/publication-download/technical-guidance-public-sector-equality-duty-england>.
- 7.6 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, Equality objectives and the equality duty, Equality information and the equality duty.
- 7.7 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>

8. Equalities implications

- 8.1 Addressing inequalities within the health and care system, especially those impacting upon our Black, Asian and Minority Ethnic (BAME) communities, is a key priority for the Council and its partners. Research shows that children from deprived areas and from BAME communities are more at risk of being injured on the road. By making improvements to the road network facilities that will be in place at all times rather than the short time that the school crossing patrol operates is expected to provide overall benefits to road safety.

9. Climate change and environments implications

- 9.1 Reducing the service could be considered as being counter to some of the Council's strategic objectives, such as encouraging healthy and sustainable travel to school, and improving road safety and air quality in the vicinity of schools. However, it should also be noted that, across the

Council, a wide range of other initiatives and programmes of investment are targeted at these strategic objectives and the introduction of the mitigation measures such as School Streets and light controlled pedestrian crossing facilities will have a positive impact on encouraging sustainable forms of travel.

10. Crime and disorder implications

- 10.1 There are no anticipated crime and disorder implications resulting from this service.

11. Health and wellbeing implications

- 11.1 Reducing the service could be considered as being counter to some of the Council's strategic objectives around public health, such as encouraging healthy lifestyles and improving air quality in the vicinity of schools. However, it should also be noted that, across the Council, a wide range of other initiatives and programmes of investment are targeted at these strategic objectives and the introduction of the mitigation measures such as School Streets and light controlled pedestrian crossing facilities will have a positive impact on encouraging sustainable forms of travel.

12. Report author and contact

Paul Boulton, Interim Director for Public Realm

Appendix 1

School Crossing Patrol sites with recommended mitigation measures

School	Location	Existing engineering measures	Meets criteria (Y/N)	Potential future mitigation measures	Issues/Risks	Update
Adamsril (Vacant)	Adamsril Road	Kerb build out, informal crossing	No	No further work required.	School Street now in place managed by ANPR cameras.	SCP has already been removed due to the School Street being introduced. No further measures needed.
Baring (Vacant)	Baring Road / Linchmere Road	Island	Yes	Improved signage, Raised crossing point. Upgrade to light controlled crossing.	ANPR camera monitoring vehicles contravening the central refuge Keep Left sign.	
Beecroft	Brockley Road	Island on zebra	Yes	Zebra crossing upgrade to light controlled crossing.	Collisions near to school crossing site. High traffic volumes.	20 mph banners and 2 vehicle activated signs installed following speed concerns raised by Cllrs and public. School Street implemented on Beecroft Road and Dalrymple Road.
Brindishe Green	Hither Green Lane / Beacon Road	Zebra	Yes	Raised table, Improve zebra visibility – halo lights, illuminated columns, Kerb build outs, light controlled crossing upgrade.	Collisions on the existing zebra crossing. High traffic volumes.	School Street implemented on Beacon Road. VAZ signs installed.
Brindishe Manor	Manor Lane / Southbrook Road	No crossing & informal crossing Site within LTN	Yes	Improve signage, Informal Crossing point.	Street on side road. 1 cycle serious casualty age 16 – 20 years.	Within the Lee Green LTN
Colfes	Upwood Road / Leyland Road	No crossing	Yes	Improve signage.	In LTN, school is a Greenwich school but in Lewisham.	Within the Lee Green LTN
Dalmain	Brockley Rise	Zebra	Yes	Raised table, Improve zebra visibility – halo lights, illuminated columns,	School Streets implemented at Brockley Park and Grove Close.	Kerb build outs have been installed to narrow the road width and improve sightlines.

				Upgrade to light controlled crossing.		
Fairlawn	Honor Oak Road	Zebra on raised table	Yes	VAZ Signage, Improve zebra visibility – halo lights, illuminated columns, Upgrade to light controlled crossing.	The school community have raised speed concerns in previous years.	Design underway to create a School Safety Zone.
Gordonbrock	Ladywell Rd	Island on raised table	Yes	Improved signage, VAZ signage Upgrade to a Zebra crossing or light controlled crossing.	School Streets implemented at Amyruth Road and Gordonbrock Road.	As part of the review of the School Streets there is a need to monitor the SCP site.
Grinling Gibbons	Edward Street	Raised Zebra and Cycle Crossing	No	Improved signage (Need to review as may be sufficient)		Zebra Crossing was implemented as part of the Quietway Cycle Route.
John Ball (Vacant)	Baizdon Road	Informal crossing on raised table	No	No further work reqd.	School Street now in place managed by the school.	SCP has already been removed due to the School Street being introduced. No further measures needed.
John Stainer	Mantle Road	Zebra on raised table	Yes	Improve zebra visibility – halo lights, illuminated columns, Upgrade to light controlled crossing.		
John Stainer	St Asaphs Road / Finland Road	Zebra on raised table	Yes	Improve zebra visibility – halo lights, illuminated columns, Upgrade to light controlled crossing.		
Kelvin Grove	Kirkdale / Kelvin Grove	No crossing	Yes	Vaz signage, Kerb build outs, Central traffic refuge, informal crossing point, Zebra or Light Controlled Crossing.		School Street implemented on Kelvin Grove. Speed concerns. Currently no pedestrian facilities at this site, very wide road.
Kilmorie	Cranston Road / Loxton Road	Island on raised table	Yes	Improved signage, VAZ signage.		

Marvels Lane	Marvels lane	No crossing	Yes	Kerb build outs, VAZ signage. Zebra or light controlled crossing.	Bus route with bus stop very close to the SCP site.	School Street implemented on Riddons Road.
Our Lady and St Philip Neri	Sydenham Road	Island	Yes	Improved signage, VAZ signage Upgrade to a Zebra crossing or signal controlled crossing.		
Prendergast Ladywell Fields (Vacant)	Manwood Rd	Raised table/informal crossing	Yes	VAZ signage, Kerb build outs, School Safety Zone, Enhanced crossing points.		School Street implemented on Ewhurst Road to the junction with Manwood Road. Previously a Zebra Crossing was implemented at the park entrance for secondary pupils. VAZ signs also installed.
Rangefield	Rangefield Road / Glenbow Road	Informal crossing	No	School Street due Feb 2023		School Street due to be implemented Feb/March 2023. This will reduce traffic volume at the SCP site.
Rangefield, Downderry, (Vacant)	Downham way/ Glenbow Road	Island	Yes	VAS signage, Kerb build outs, informal crossing point, Zebra or Light Controlled Crossing.		
Rathfern	Catford Hill / Woolstone Road	Zebra on raised table	Yes	Improved signage, VAZ signage, Improve zebra visibility – halo lights, illuminated columns, Upgrade to light controlled crossing.		School Street implemented on Rathfern Road this doesn't affect the SCP site. VAZ signs warning of the bend installed.
Sandhurst	Sandhurst Road	Informal crossing point	Yes	Improved signage, VAZ signage, road narrowing, enhanced crossing points.		School Street in feasibility design on Minard Road and Ardgowan Road, SCP site would need to be considered in the design.
St George's (Vacant)	Perry Vale	Zebra on raised table	Yes	Improve signage, VAZ Signage,		

				Improve zebra visibility – halo lights, illuminated columns, Upgrade to light controlled crossing.		
St Stephens	Friendly St J/W Albyn Rd	No crossing	No	VAZ signage, Improved signage. Potential adjacent School Street.		School has requested a School Street this would not cover the existing SCP site.
Sydenham High	Westwood Hill / Amberley Grove	Island	Yes	VAZ signage, Improved signage, Informal crossing point. Upgrade to light controlled crossing.		
Tidemill	Giffin Street	No crossing	No	Improved signage, VAZ signage. Inclusion into adjacent School Street.	The school encourage parents to stop in Frankham Street and walk through to Giffin Street to the SCP site.	School Street implemented on Tidemill Way managed by the School. The School Street could be improved by linking with the Deptford High St plans.
Torridon (Vacant)	Torridon Road / Hazelbank Road	No crossing	Yes	School Street		School Street requested by the school.
Twin Oaks	Grinstead Road / Scawen Road	Island	Yes	Improved signage, VAZ signage, enhanced crossing points.		School Street implemented on Beacon Road. VAZ signs installed.



Public Accounts Select Committee

Report title: 2023/24 Budget Report

Date: 2 February 2023

Key decision: Yes

Class: Part 1

Ward(s) affected: All

Contributors: Executive Director for Corporate Resources

Outline and recommendations

The purpose of this report is to set out the overall financial position of the Council in relation to 2022/23 and to set the Budget for 2023/24. This report allows the Council Tax to be agreed and housing rents to be set for 2023/24. It sets the Capital Programme for the next three years and the Council's Treasury Strategy for 2023/24.

The report provides summary information on the revenue budget reduction proposals that were presented at Mayor & Cabinet on the 7 December 2022. The approval and successful delivery of these measures is required in order to help balance the budget for 2023/24 and prepare to address the budget requirement for 2024/25.

Public Accounts Select Committee are asked to review the draft Budget Report 2023/24 appended, and to approve and refer on to Mayor and Cabinet on 8 February 2023.

Timeline of engagement and decision-making

The Council Tax Base was approved by Council on the 18 January 2023.

Financial Monitoring P7 was approved by Mayor and Cabinet on 11 January 2023.

Budget reduction proposals for 2023/24 totalling £14.4m were approved by Mayor and Cabinet on the 7 December 2022.

1. Summary

- 1.1 The appended draft report sets out the context and range of budget assumptions which Council is required to agree to enable it to set a balanced budget for 2023/24. These include the General Fund, grants, fees and charges, housing, schools funding, treasury and capital programme.

2. Recommendations

- 2.1 Public Accounts Select Committee are asked to review the draft Budget Report 2023/24 appended, and to approve and refer on to Mayor and Cabinet on 8 February 2023.

3. Policy Context

- 3.1 The Council's strategy and priorities drive the Budget with changes in resource allocation determined in accordance with policies and strategy. The Council launched its new Corporate Strategy in November 2022, with seven corporate priorities as stated below:

Corporate Priorities

- 3.2 The Council's corporate priorities are:

- Cleaner and Greener
- Strong Local Economy
- Quality Housing
- Children and Young People
- Safer Communities
- Open Lewisham
- Health and Wellbeing

- 3.3 The Council also takes account of the 'Mayor's pledges', as outlined in the 2022 Labour Manifesto. These pledges are as follows:

- Place - We want Lewisham to be a place for everyone.
- Community - We will be relentlessly focused on local.
- Diversity - We will celebrate Lewisham's diversity.
- Inward investment and Opportunity - We will work to attract inward investment.

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- Innovation and New Ideas – We will take risks to innovate and seize new opportunities.

Values

- 3.4 Values are critical to the Council's role as an employer, regulator, and securer of services and steward of public funds. The Council's values shape interactions and behaviours across the organisational hierarchy, between officers, and members, between the council and partners and between the council and citizens. In taking forward the Council's Budget Strategy, we are guided by the Council's 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.
- 3.5 The setting a balanced budget for 2023/24 directly supports the achievement of the Council's corporate priorities. As required under the CIPFA Financial Management Code of Practice, the Council must demonstrate how its budget is aligned to its corporate priorities. Appendix Y3 sets out how the proposed budget for 2023/24 would align to the seven priorities set out above.
- 3.6 As noted in the 2022/23 budget, the Council's strong and resilient framework for prioritising action has served the organisation well in the face of austerity and on-going cuts to local government spending. This continues to mean, that even in the face of the most daunting financial challenges facing the Council and its partners, we continue to work alongside our communities to achieve more than we could by simply working alone.
- 3.7 This joint endeavour helps work through complex challenges, such as the pressures faced by health and social care services, and to secure investment in the borough, for new homes, school improvements, regenerating town centres, renewed leisure opportunities and improvement in the wider environment. This work has and continues to contribute much to improve life chances and life opportunities across the borough through improved education opportunities, skills development and employment. Of course, there is still much more that can be done to realise our ambitions for the future of the borough; ranging from our work to support housing supply and business growth, through to our programmes of care and support to some of our most vulnerable and troubled families.
- 3.8 It remains clear that the Council cannot do all that it once did, nor meet all those expectations that might once have been met, for we are in a very different financial position than just a decade ago. Severe financial constraints have been imposed on Council services with budget reductions to be made year on year on year, and this on-going pressure is addressed in this report, incorporating further budget reduction proposals for 2023/24 and noting that the Autumn Statement suggested that Local Government funding from 2025/26 would be severely constrained. This is pending the outcome of the Fair Funding Review (FFR) and Business Rates Retention (BRR) consultations now expected to be announced in 2025/26 at the earliest.
- 3.9 At the same time, as set out at section 6 of the report, the use of resources to address risks and pressures through positive investments is an opportunity. These investments are also supported via the capital programme at section 11. This spending deals with both existing pressures, additional significant inflationary pressures (including energy) and supports the Council in refocusing and changing services where new opportunities

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and expectations for how the Council can better deliver them to support the community are identified.

- 3.10 The cost of living crisis is affecting our residents, businesses and the Council alike. For the Council this is manifesting as energy costs which have tripled and inflationary pressures from the higher than budgeted 2022/23 pay award and the 40 year high rate of inflation of over 10%.

4. Structure Of The Report, Policy Context, And Background

- 4.1 The 2023/24 Budget Report is structured as follows:

Section 1	Summary
Section 2	Recommendations
Section 3	Policy Context
Section 4	Structure of the Report, Policy Context, and Background
Section 5	Background
Section 6	General Fund Revenue Budget and Council Tax
Section 7	Other Grants and Future Years' Budget Strategy
Section 8	Dedicated Schools Grant and Pupil Premium
Section 9	Consultation on the Budget
Section 10	Financial Implications
Section 11	Legal Implications
Section 12	Equalities Implications
Section 13	Climate Change and Environmental Implications
Section 14	Crime and Disorder Implications
Section 15	Health and Wellbeing Implications
Section 16	Background Papers
Section 17	Glossary
Section 18	Report Author and Contact
Section 19	Appendices

5. Background

- 5.1 This section in the appended draft report sets out the main national macro-economic and public spending position, the current position in respect of local government finance, and some of the key Council services as context for the Budget spending details.

6. General Fund Revenue Budget And Council Tax

- 6.1. This section considers the General Fund revenue budget and Council Tax. The General Fund budget for 2023/24, assuming a Council Tax increase of 4.99%, is £263.679m. Details of the budget reduction measures approved for 2023/24 are provided at Appendices Y1 and Y2.
- 6.2. It is structured as follows:

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- Update on 2022/23 Revenue Budget;
- The Budget Model;
- Budget Reduction Proposals;
- Council Tax for 2023/24; and
- Overall Budget Position for 2023/24.

7. Other grants and future years' budget strategy

- 7.1. This section of the report considers the other funding streams which the Council currently receives and implications for future years. The critical point for the budget is that spend of these grants is managed by the Council to ensure commitments are maintained within the resources available. This is to avoid putting pressure on the General Fund.
- 7.2. These other funding streams are Public Health, Better Care Fund, and various other grants. This section of the report is structured as follows:
- New Homes Bonus;
 - Better Care Fund and improved Better Care Fund 2023/24;
 - Discharge Fund;
 - Public Health Grant 2023/24;
 - Social Care Grant;
 - Adult Social Care Precept;
 - Market Sustainability and Improvement Fund;
 - Services Grant;
 - LCTS Administration Support Grant; and
 - UK Shared Prosperity Fund

8. Dedicated schools grant and pupil premium

- 8.1. This section of the appended report sets out a summary of the current year funding blocks for schools, and considers the funding for the 2023/24 budget, and considers risks and pressures arising

9. Consultation on the budget

- 9.1 In setting the various budgets, it is important to have extensive engagement with citizens to consider the overarching challenge facing public services in Lewisham over the next few years. To this end, the Council has undertaken a range of engagement and specific consultation exercises. The appended report sets this out where this process has concluded and enabled this to be presented..

10. Financial implications

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- 10.1 The financial implications are as contained within the appended draft report for Mayor and Cabinet.

11. Legal implications

- 11.1 The legal implications are as contained within the appended draft report for Mayor and Cabinet.

12. Equalities implications

- 12.1 The equalities implications are as contained within the appended draft report for Mayor and Cabinet.

13. Climate change and environmental implications

- 13.1 The climate change and environmental implications are as contained within the appended draft report for Mayor and Cabinet.

14. Crime and disorder implications

- 14.1 The crime and disorder implications are as contained within the appended draft report for Mayor and Cabinet.

15. Health and wellbeing implications

- 15.1 The health and wellbeing implications are as contained within the appended draft report for Mayor and Cabinet.

16. Background papers

Short Title of Report	Date	Location	Contact
Medium Term Financial Strategy	6 July 2022 (M&C)	1st Floor Laurence House	David Austin
Budget Reductions Report 2023/24	7 December 2022 (M&C)	1st Floor Laurence House	David Austin
Council Tax Base	18 January 2023 (Council)	1st Floor Laurence House	David Austin

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17. Glossary

Term	Definition
Collection Fund	A statement that shows the transactions of the billing authority in relation to non-domestic rates and the Council Tax, and illustrates the way in which these have been distributed to preceptors and the General Fund.
General Fund	This is the main revenue account which summarises the cost of all services (except those related to Council Housing and Locally Managed Schools) provided by the Council.
Housing Revenue Account	Reflects a statutory obligation to account separately for local authority housing provision. It shows the major elements of housing revenue expenditure and how this is met by rents, subsidy and other income.
Reserves	Amounts set aside for purposes falling outside the definition of provisions made above are considered as reserves.
Revenue Support Grant	A general grant paid by Central Government to local authorities to help them finance the cost of their services, distributed on the basis of government relative needs formulas.

18. Report author and contact

David Austin – Director of Finance david.austin@lewisham.gov.uk

Katharine Nidd – Head of Strategic Finance, Planning and Commercial
katharine.nidd@lewisham.gov.uk

Financial implications on behalf of the Executive Director for Corporate Resources were provided by the report authors.

Legal implications on behalf of the Monitoring Officer were provided by Melanie Dawson

19. Appendices

Appendix 1 – Draft 2023/24 Budget Report

Appendix 2 – Draft Appendices to 2023/24 Budget Report

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Mayor and Cabinet

Report title: 2023/24 Budget Report

Date: 08 February 2023

Key decision: Yes

Class: Part 1

Ward(s) affected: All

Contributors: Executive Director for Corporate Resources

Outline and recommendations

The purpose of this report is to set out the overall financial position of the Council in relation to 2022/23 and to set the Budget for 2023/24. This report allows the Council Tax to be agreed and housing rents to be set for 2023/24. It sets the Capital Programme for the next three years and the Council's Treasury Strategy for 2023/24.

The report provides summary information on the revenue budget reduction proposals that were presented at Mayor & Cabinet on the 7 December 2022. The approval and successful delivery of these measures is required in order to help balance the budget for 2023/24 and prepare to address the budget requirement for 2024/25.

The Mayor is asked to consider the recommendations listed in this report at section 2.

Timeline of engagement and decision-making

Public Accounts Select Committee approved the draft 2023/24 Budget Report on the 2 February 2023.

The Council Tax Base was approved by Council on the 18 January 2023.

Financial Monitoring P7 was approved by Mayor and Cabinet on 11 January 2023.

Budget reduction proposals for 2023/24 totalling £14.4m were approved by Mayor and Cabinet on the 7 December 2022.

1. Summary

1.1 This report sets out the context and range of budget assumptions which Council is required to agree to enable it to set a balanced budget for 2023/24. These include the following:

1.2 General Fund

- In respect of the General Fund, the assumed net revenue expenditure budget is £263.679m. This is made up of provisional Settlement Funding from government (revenue support grant and business rates), and forecast Council Tax receipts including an increase in Council Tax of 4.99% with the detail set out in section 6.
- The changes to the prior year General Fund position to meet the 2023/24 net revenue budget of £263.679m are proposed on the basis of the following assumptions:
 - £12.6m of revenue budget reductions have been agreed for 2023/24, of which £3.6m were previously agreed and £9m agreed 7 December 2022;
 - An assumed 4.99% increase in Band D Council Tax for Lewisham's services for 2023/24; including the 2.99% increase in the core Council Tax as announced in the provisional Local Government Finance Settlement and 2% increase for the Social Care precept;
 - £18m of corporate budget for risks and pressures in 2023/24;
 - £3.3m of base budget growth for energy costs;
 - £4.1m of additional pay inflation for 2022/23;
 - £7.1m of pay inflation for 2023/24;
 - £5m of non-pay inflation for 2023/24;

1.3 Fees and Charges

- This report also presents the 2023/24 proposed fees and charges and related annual increase for the majority of chargeable services, statutory and discretionary.

1.4 Dedicated Schools Grant, Pupil Premium and additional Autumn Statement funding

- The 2023/24 overall Dedicated Schools Grant (DSG) allocation is £337.776m (of which, £26.3m is part of Early Years Block and remains provisional). Approximately £10m of this funding relates to previously specific grants, which are now streamlined into the DSG. This shows a net increase of circa £10m.
 - Schools block – A net increase of £11.4m;
 - Central Services to Schools block – A net reduction of £0.4m;
 - High Needs block – A net increase of £7m;
 - Early Years block – A net increase of £1.8m.

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- High Needs block, which supports Special Needs – Schools Forum, at their meeting on 19th January 2023, agreed a transfer of circa £0.4m (0.18%) to support the extreme pressure facing the High Needs block. Lewisham council is engaging with the DfE on the delivering best value initiative to consider review of services currently provided within the high needs block. This initiative will supplement the work currently progressing as part of the wider mitigation plan.
- Early Years Funding – Following on from the summer consultation, it was recognised that Lewisham's funding should be increased. The changes here reflect increases as part of that review. Overall, there is an increase in the hourly rates for 3-4 year olds from £6.04 to £6.33 (4.8%) and for 2 year olds £6.87 to £7.52 (9%).
- Central Schools Services Block – this funding is for services that support schools including admission. The overall reduction is circa £0.4m.
- Pupil Premium - funding rates are confirmed to increase by circa 5%, however the school-by-school final allocation will be advised in the summer 2023. For reference the allocation for 2022/23 was £14.7m.
- Additional Autumn statement funding - in addition to the funding noted above, for 2023/24 the Department for Education (DfE) has made a provisional allocation of £7.8m for mainstream schools (as a separate grant) and £3.2m for High Needs (included in the £7m increase in the High Needs block).

1.5 Housing

- A proposed rent increase capped to a maximum of 7.0% (an average of £7.22 per week) in respect of dwelling rents, 7.0% (average £2.63 per week) in respect of hostels, and a range of other proposed changes to service charges. The proposed annual expenditure for the Housing Revenue Account is £257.1m, including the capital and full new build programme, for 2023/24.
- The proposed Capital Programme (Housing Revenue Account) budget for 2023/24 to 2027/28 of £641.3m, of which £153.5m is for 2023/24;
- Lewisham Homes developed and implemented an action plan to manage the problems related to damp and disrepair. These include undertaking property MOT's, to fully identify damp & disrepair within the Councils stock managed by Lewisham Homes with the target of completing 1,000 MOT's.
- Lewisham Homes continue to conduct urgent reviews and physical inspections of every property on their damp and disrepair logs.
- Upon completion of MOT's/surveys, repairs and follow-up actions are being taken to resolve the issues identified. This may require the allocation of additional resources which may not be fully forecasted within the current HRA budget allocations. Discussions are on-going with Lewisham Homes on how to fund the cost of these repairs which may result in capital plans being reprioritised for existing stock.

1.6 Other Income and Grants

- Section 6 of the report sets out the detail of changes to other sources of income, including grants.
- The following grants continue into 2023/24 and are broadly unchanged from 2022/23: Public Health Grant, Better Care Fund and the Improved Better Care Fund.
- The following grants have increased and been used to fund pressures for 2023/24: Social Care Grant and the ASC Market Sustainability and Improvement Fund.
- The following grants have continued but at significantly reduced levels and are being used to fund once off pressures only: New Homes Bonus and Services Grant.
- The following grants have been withdrawn or rolled into other grants: Lower Tier grant (withdrawn), Independent Living Fund (rolled into Social Care grant), LCTS

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- Admin Support grant (rolled into the Settlement Funding Assessment), and Market Sustainability and Fair Cost of Care grant (rolled into ASC Market Sustainability and Improvement Fund).
- The Discharge Grant is new but replaces monies already provided by Health partners and so will not provide capacity for new growth.

1.7 Treasury

- The report updates the Council's Treasury Management Strategy for both borrowing and investments. The proposed approach and levels of risk the Council takes in its Treasury functions remain prudent in line with last year, and officers continue to explore alternative investment options and further opportunities to undertake debt restructuring in order to reduce balance sheet risk and best fund the capital plans set out.
- There are no material changes to the strategy although it has been amended to reflect the 2021 requirements of the Chartered Institute of Public Finance and Accountancy's (CIPFA) Code of Practice on Treasury Management.

1.8 Capital

- The proposed Capital Programme (General Fund and Housing Revenue Account) budget for 2023/24 to 2026/27 is £480.6m; split £86.7m (18%) for the General Fund and £393.9m (72%) for the Housing Revenue Account. Of this programme £193.3m is for 2023/24 with £51.4m on the General Fund and £142.0m on the Housing Revenue Account.

2. Recommendations

2.1 It is recommended that the Mayor and Cabinet considers the comments of the Public Accounts Select Committee of 2 February 2023.

2.2 That, having considered the views of those consulted on the budget, and subject to consideration of the outcome of consultation with business ratepayers and subject to proper process, as required, the Mayor and Cabinet:

General Fund Revenue Budget

2.3 notes and asks Council to note the projected overall variance of £9.6m (or 3.9%) against the agreed 2022/23 revenue budget of £248.610m as set out in section 6 of this report and that any year-end overspend will be met from corporate provisions and reserves;

2.4 endorses and asks Council to endorse the budget cut reduction measures of £12.587m as per the Mayor and Cabinet meeting of the 7 December 2022, as set out in section 6 of the report and summarised in Appendix Y1 and Y2;

2.5 agrees and asks Council to agree the allocation of £43.848m of resources from the corporate risks and pressures, social care precept, new homes bonus, social care grant, ASC market sustainability and improvement fund and services grant in 2023/24 to be invested in funding quantified budget pressures and opportunities, both recurring and once-off as set out in section 6;

2.6 agrees to recommend to Council that a General Fund Budget Requirement of £263.679m for 2023/24 be approved;

2.7 asks Council to agree to a 4.99% increase in Lewisham's Council Tax element. This will result in a Band D equivalent Council Tax level of £1,492.13 for Lewisham's services and £1,926.27 overall. This represents an overall increase in Council Tax for

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2022/23 of 6.02% and is subject to the GLA precept for 2023/24 being increased by £38.55 (i.e. 9.74%) from £395.59 to £434.14, in line with the GLA's draft budget proposals;

- 2.8 notes the final settlement figure for 2023/24 has not yet been announced and delegates authority to the Executive Director for Corporate Resources to include any change to the provisional settlement of £131,105,977 in the report for Council with any difference covered from provisions and reserves as necessary;
- 2.9 notes the provisional and estimated precept and levies from the GLA and other bodies as detailed in Appendix Y6 and delegates authority to the Executive Director for Corporate Resources to include any changes to these in the report for Council with any difference covered from provisions and reserves as necessary;
- 2.10 notes and asks Council to note the Council Tax Ready Reckoner which for illustrative purposes sets out the Band D equivalent Council Tax at various levels of increase. This is explained in section 6 of the report and is set out in more detail in Appendix Y4;
- 2.11 asks that the Executive Director for Corporate Resources issues cash limits to all Directorates once the 2023/24 Revenue Budget is agreed;
- 2.12 considers, and asks Council to consider, the Section 25 Statement from the Chief Finance Officer. This is attached at Appendix Y5;
- 2.13 agrees and asks Council to agree the draft statutory calculations for 2022/23 as set out at Appendix Y6;
- 2.14 notes and asks Council to note the prospects for the revenue budget for 2023/24 and future years as set out in section 6;
- 2.15 agrees and asks officers to continue to develop firm proposals to redesign and transform services and inform the capital strategy by bringing them forward in good time to support the work towards a savings and investment round to help plan early to meet the future forecast medium term finance strategy objectives;

Other Grants (within the General Fund)

- 2.16 notes and asks Council to note the adjustments to and impact of various specific grants for 2023/24 on the General Fund as set out in section 7 of this report;
- 2.17 accept the funding allocation from the GLA and CLF for the UK Shared Prosperity Fund (UKSPF) of £1.92m (a combination of £0.977m capital and £0.943m revenue), subject to review of the grant funding agreements;

Fees and charges

- 2.18 approves the approach to setting 2023/24 fees and charges for chargeable services in section 8 of the report and attached at Appendix Y8;

Dedicated Schools Grant and Pupil Premium

Schools Block

- 2.19 note and recommends that Council notes that the provisional Dedicated Schools Grant allocation of £231.029m (this includes circa £6.18m streamlining of the supplementary grant) be the Schools' Budget (Schools Block) for 2023/24 covering both maintained schools and academies;
- 2.20 notes an increase in pupil unit funding for primary of £205.26 and secondary of £370.59 and this also incorporates the supplementary grant as mentioned in 1.1 above. However, there has been an overall reduction in primary age pupil by 451, partially offset by an increase in secondary school numbers of 224;
- 2.21 notes that following the Schools Forum meeting on the 19 January 2023, submission has been made to the Department for Education with regards to school funding

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formula, recommending the application of the National Funding Formula (including unit values) allowing for a maximum 0.5% uplift in Minimum Funding Guarantee (MFG);

- 2.22 agrees and recommends that Council agrees, (as recommended by Schools Forum) the once-off transfer of circa £0.4m (0.18%) of Dedicated Schools Grant to the High Needs Block;

Central Schools Services Block (CSSB)

- 2.23 notes, and asks Council to note, the construct and allocation of £3.309m for the CSSB block allocation for 2023/24, a reduction of circa £0.4m from the £3.693m 2022/23 allocation;

High Needs Block (HNB)

- 2.24 notes, and asks Council to note, the provisional HNB £77.154m to support the Council's statutory duty with regards Special Education Needs (SEN). This includes £3.2m additional funding from the autumn statement. This is a net increase of £7.030m relative to 2022/23. The HNB will be finalised in March for deductions arising for institutions funded by the Education and Skills Funding Agency (ESFA);

- 2.25 notes that the Schools Forum on 19 January 2023 agreed the transfer of circa £0.4m (0.18%) to the block to support the Council to meet its statutory functions;

- 2.26 notes that the HNB is expected to overspend by between £4m to £6m in 2022/23, increasing the cumulative overspend to circa £16m in total for 2022/23 as £11m has been brought forward from 2021/22. The overspend is currently ringfenced within the DSG, Lewisham is part of the delivering better value (DBV) tranche 3 initiative with the DfE ;

Early Years Block (EYB)

- 2.27 notes, and asks Council to note, the Dedicated Schools Grant allocation to the EYB of £26.283m; and that the Department for Education has increased hourly funding for "3 and 4 year old" from £6.04 to £6.33 (this includes 11p for Teacher's Pay and Pension Grant which is now streamlined into the hourly rate). This is therefore an increase of circa 4.8% from 2022/23. With respect to 2 year funding, the hourly rate has increased from £6.87 to £7.52, an 9% increase (i.e. 65p per hour) for 2023/24;

- 2.28 notes that the maintained nursery supplementary funding allocation for 2023/24 is subject to change but is expected to increase by circa £60k, subject to movement in pupil numbers;

Pupil Premium

- 2.29 notes, and asks Council to note, that the pupil premium will continue in the 2023/24 financial year. At the time of writing, the overall allocation, which is linked to Free School Meals Ever 6 data (i.e. covers 6 census worth of data), has not been confirmed, the per-pupil funding is expected to increase by 5%. We would expect to receive the final allocation until summer 2023;

Housing Revenue Account

- 2.30 notes, and asks Council to note, the consultation report on proposed service charge increases to tenants' and leaseholders in the Brockley area, presented to tenants and leaseholders on 5th December 2022, as attached at Appendix X3;

- 2.31 notes, and asks Council to note, the consultation report on proposed service charge increases to tenants' and leaseholders and the Lewisham Homes budget strategy presented to tenants and leaseholders on 12th December 2022 as attached at Appendix X4;

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- 2.32 agrees, and asks Council, to set an increase in dwelling rents of 7.0% (an average of £7.22 per week) – as per the Governments direction for capping increases to be applied to rents for 2023/24 outlined in section 9 of this report;
- 2.33 agrees, and asks Council to agree, to set an increase in the hostels accommodation charge by 7.0% (or £2.63 per week), in accordance with Governments direction for capping increases to be applied to rents for 2023/24;
- 2.34 approves, and asks Council to approve, the following average weekly increases/decreases for dwellings for:
- 2.34.1 service charges to non-Lewisham Homes managed dwellings (Brockley) to ensure full cost recovery and 13.6% inflationary uplift for 2023/24;
- | | | |
|-------------------------|-------|---------|
| • caretaking | 13.6% | (£0.46) |
| • grounds | 13.6% | (£0.26) |
| • communal lighting | 13.6% | (£0.02) |
| • bulk waste collection | 13.6% | (£0.18) |
| • window cleaning | 13.6% | (£0.00) |
| • tenants' levy | 0.00% | (£0.00) |
- 2.34.2 service charges to Lewisham Homes managed dwellings:
- | | | |
|-----------------------|---------|----------|
| • caretaking | 10.00% | (£0.68) |
| • grounds | 0.00% | (£0.00) |
| • window cleaning | -27.00% | -(£0.03) |
| • communal lighting | 7.00% | (£0.19) |
| • block pest control | -17.00% | -(£0.35) |
| • waste collection | 7.00% | (£0.14) |
| • heating & hot water | 5.00% | (£0.54) |
| • tenants' levy | 0.00% | (£0.00) |
| • bulk waste disposal | 7.00% | (£0.07) |
| • sheltered housing | 0.00% | (£0.00) |
- 2.34.3 approves, and asks Council to approve, the following average weekly percentage changes for hostels and shared temporary units for;
- service charges (hostels) – caretaking etc.; 6.31% or £4.60pw
 - energy cost increases for heat, light & power; 20.0% or £1.19pw
 - water charges increase; 5.0% or £0.01pw
- 2.34.4 approves, and asks Council to approve, an increase in garage rents by 10.0% (£1.66 per week) for Brockley and Lewisham Homes residents as outlined in Appendix X5;
- 2.34.5 notes, and asks Council to note, that the budgeted expenditure for the Housing Revenue Account (HRA) for 2023/24 is £257.1m, split £103.6m revenue and £153.5m capital, which includes the decent homes and new build programmes;

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- 2.34.6 agrees the HRA budget strategy cut proposals in order to achieve a balanced budget in 2023/24, as attached at Appendix X1;
- 2.34.7 notes the 2022/23 Quarter 2 HRA Capital Programme monitoring position and the Capital Programme potential future schemes and resources as set out in section 9 of this report;

Treasury Management Strategy

- 2.35 approves and recommends that Council approves the Treasury Management Strategy 2023/24 including the prudential indicators and treasury indicators, as set out in section 10 of this report;
- 2.36 approves and recommends that Council approves the Annual Investment Strategy and Creditworthiness Policy, set out in further detail at Appendix Z2;
- 2.37 approves and recommends that Council approves the Investment Strategy as set out in section 10 of this report, along with the operational boundary and authorised limit for the year as set out in section 10 of this report;
- 2.38 approves and recommends that Council approves the Minimum Revenue Provision (MRP) policy as set out in section 10 of this report;
- 2.39 agrees and recommends that Council agrees to delegate to the Executive Director of Corporate Resources authority during 2023/24 to make amendments to borrowing and investment limits provided they are consistent with the strategy and there is no change to the Council's authorised limit for borrowing;
- 2.40 approves and recommends that Council approves the overall credit and counterparty risk management criteria, as set out at Appendix Z2, the proposed countries for investment at Appendix Z3, and that it formally delegates responsibility for managing transactions with those institutions which meet the criteria to the Executive Director for Corporate Resources;

Capital Programme

- 2.41 notes the capital programme position and recommends that Council approves the 2023/24 to 2026/27 Capital Programme of £480.6m as set out in section 11 of this report and Appendix W1;
 - 2.42 agrees that officers prepare governance and a prioritisation process, based on the adaptation of existing arrangements, with a recommendation to:
 - Explore an annual Strategic CIL budget for infrastructure project allocation
 - Develop an annual process for the allocation of Strategic CIL as part of the budget-setting process
 - Vary the existing governance process for s106 monies agreed by Mayor and Cabinet to accommodate CIL and make any necessary updates to reflect the current Constitution
 - Develop a prioritisation process for Strategic CIL projects, to be reviewed after its first year of implementation
- .

3. Policy Context

- 3.1 The Council's strategy and priorities drive the Budget with changes in resource allocation determined in accordance with policies and strategy. The Council launched

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its new Corporate Strategy in November 2022, with seven corporate priorities as stated below:

Corporate Priorities

3.2 The Council's corporate priorities are:

- Cleaner and Greener
- Strong Local Economy
- Quality Housing
- Children and Young People
- Safer Communities
- Open Lewisham
- Health and Wellbeing

3.3 The Council also takes account of the 'Mayor's pledges', as outlined in the 2022 Labour Manifesto. These pledges are as follows:

- Place - We want Lewisham to be a place for everyone.
- Community - We will be relentlessly focused on local.
- Diversity - We will celebrate Lewisham's diversity.
- Inward investment and Opportunity - We will work to attract inward investment.
- Innovation and New Ideas – We will take risks to innovate and seize new opportunities.

Values

3.4 Values are critical to the Council's role as an employer, regulator, and securer of services and steward of public funds. The Council's values shape interactions and behaviours across the organisational hierarchy, between officers, and members, between the council and partners and between the council and citizens. In taking forward the Council's Budget Strategy, we are guided by the Council's 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.

3.5 The setting a balanced budget for 2023/24 directly supports the achievement of the Council's corporate priorities. As required under the CIPFA Financial Management Code of Practice, the Council must demonstrate how its budget is aligned to its corporate priorities. Appendix Y3 sets out how the proposed budget for 2023/24 would align to the seven priorities set out above.

3.6 As noted in the 2022/23 budget, the Council's strong and resilient framework for prioritising action has served the organisation well in the face of austerity and on-going cuts to local government spending. This continues to mean, that even in the face of the most daunting financial challenges facing the Council and its partners, we continue to work alongside our communities to achieve more than we could by simply working alone.

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- 3.7 This joint endeavour helps work through complex challenges, such as the pressures faced by health and social care services, and to secure investment in the borough, for new homes, school improvements, regenerating town centres, renewed leisure opportunities and improvement in the wider environment. This work has and continues to contribute much to improve life chances and life opportunities across the borough through improved education opportunities, skills development and employment. Of course, there is still much more that can be done to realise our ambitions for the future of the borough; ranging from our work to support housing supply and business growth, through to our programmes of care and support to some of our most vulnerable and troubled families.
- 3.8 It remains clear that the Council cannot do all that it once did, nor meet all those expectations that might once have been met, for we are in a very different financial position than just a decade ago. Severe financial constraints have been imposed on Council services with budget reductions to be made year on year on year, and this ongoing pressure is addressed in this report, incorporating further budget reduction proposals for 2023/24 and noting that the Autumn Statement suggested that Local Government funding from 2025/26 would be severely constrained. This is pending the outcome of the Fair Funding Review (FFR) and Business Rates Retention (BRR) consultations now expected to be announced in 2025/26 at the earliest.
- 3.9 At the same time, as set out at section 6 of the report, the use of resources to address risks and pressures through positive investments is an opportunity. These investments are also supported via the capital programme at section 11. This spending deals with both existing pressures, additional significant inflationary pressures (including energy) and supports the Council in refocusing and changing services where new opportunities and expectations for how the Council can better deliver them to support the community are identified.
- 3.10 The cost of living crisis is affecting our residents, businesses and the Council alike. For the Council this is manifesting as energy costs which have tripled and inflationary pressures from the higher than budgeted 2022/23 pay award and the 40 year high rate of inflation of over 10%.

4. Structure Of The Report, Policy Context, And Background

- 4.1 The 2023/24 Budget Report is structured as follows:

- | | |
|------------|---|
| Section 1 | Summary |
| Section 2 | Recommendations |
| Section 3 | Policy Context |
| Section 4 | Structure of the Report, Policy Context, and Background |
| Section 5 | Background |
| Section 6 | General Fund Revenue Budget and Council Tax |
| Section 7 | Other Grants and Future Years' Budget Strategy |
| Section 8 | Dedicated Schools Grant and Pupil Premium |
| Section 9 | Housing Revenue Account |
| Section 10 | Treasury Management Strategy |
| Section 11 | Capital Programme |
| Section 12 | Consultation on the Budget |
| Section 13 | Financial Implications |

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Section 14	Legal Implications
Section 15	Equalities Implications
Section 16	Climate Change and Environmental Implications
Section 17	Crime and Disorder Implications
Section 18	Health and Wellbeing Implications
Section 19	Background Papers
Section 20	Glossary
Section 21	Report Author and Contact
Section 22	Appendices

5. Background

- 5.1 This section sets out the main national macro-economic and public spending position, the current position in respect of local government finance, and some of the key Council services as context for the Budget spending details.

National Context

- 5.2 In 2022, the United Kingdom's economy was in a period of recovery following the Covid-19 pandemic. GDP growth for the year was around 4.2% as at December 2022, which was a moderate rate of growth compared with 7.5% in 2021, although the economy is expected to contract by a forecasted 0.4% in 2023, which is the worst performance across G7 countries. Globally, the rapid tightening financial conditions, the ongoing war in Ukraine, sanctions on Russia and a synchronised slowdown in Europe, Mainland China and the US will likely push global GDP growth down from 6% in 2021 to around 1.7% in 2023 — the weakest performance since 1991 aside from the financial crisis of 2008 and Covid-19 pandemic.
- 5.3 The UK unemployment rate remained static at 3.7% in 2022, however long-term sick has increased to a record high amid concerns of shortages of workers in the UK economy which comes off the back of the Covid pandemic, and Brexit which has restricted UK economic recovery. Inflation increased rapidly to a 41-year high, around 10.7% as at November 2022, which forced the Bank of England to increase interest rates to 3.5% which aimed to slow down spiralling inflation, and potential recession.
- 5.4 High inflation rates have contributed to the “cost of living” crisis which people in the UK and across the world are currently facing. The cost of living crisis refers to the fall in “real” disposable incomes that the UK has experienced since late 2021. It is being caused predominantly by high inflation outstripping wage and benefit increases and has been further exacerbated by recent tax increases.
- 5.5 The Government has tried to intervene, to support households, by providing financial support through initiatives such as the energy bills support scheme which gives a £400 discount off energy bills over the winter, however the energy price cap has increased from £1,971 in April 2022 to an expected £4,279 in April 2023. The drastic increase in energy costs, is predominantly passed on to consumers which in turn increases the price of goods and directly reduces the purchasing power of incomes as they remain stagnant, and below inflation. The impact of this is evermore present in the media, as can be seen by industrial action across the NHS, transport and education to name a few sectors striking for fair pay increases.

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- 5.6 Public debt remained high at around 97.3% of GDP, and this is expected to peak at 106.7% in 2023 before reducing over the next five years to 2027/28.
- 5.7 Overall, the UK economy in 2022 was slowly recovering from the global pandemic with moderate GDP growth rate and no reduction in labour market but there are still some challenges like the cost of living crisis, spiralling inflation and increasing public debt, all of which the UK Government and Bank of England will have to manage appropriately to reduce the risk of recession.

Local Government

- 5.8 The provisional Local Government Finance Settlement was announced on 19th December 2022, with the final settlement expected in February 2023. This is another one year only settlement pending the review of relative needs and resources (also known as the fair funding review). However, this also covered announcements for 2024/25 which were included in the policy statement published on 12th December 2022.
- 5.9 The settlement has provided a potential increase of 9.2% in council core spending power in cash terms nationally, and 9.3% for Lewisham, however this is still less than the published CPI inflation level of 10.7% in November 2022. Existing funding streams will continue; however, the Market Sustainability and Fair Cost of Care Fund will be replaced by the Adult Social Care Market Sustainability and Improvement Funding. The government expects these will support councils to meet the extra cost and demand-led pressures to keep providing services at pre-pandemic levels. Despite this, there is continuing widespread concern from the Local Government Association and others that there remains a significant funding gap for the sector to meet all its statutory service requirements, for example social care. The government's response to this has been increasing the social care precept, and the overall social care grant funding.
- 5.10 Along with the settlement announcement, the Government confirmed the continuation and an increase of 2% to the Social Care (SC) precept on Council Tax in 2023/24, created to give local authorities who are responsible for social care the ability to raise new funding to spend exclusively on Adult Social Care. In 2022/23, the Council applied a SC precept of 1%. In 2023/24, the Council is permitted to apply a maximum precept of 2% which will generate an extra £2.525m of revenue for Adult Social Care.
- 5.11 The Government also announced that the limit by which Councils can increase their core Council Tax (inclusive of levies) without a referendum, has increased to a maximum level of 2.99%.
- 5.12 With 2023/24 effectively being another roll forward year with some additional grants, the Government has deferred the fundamental review of the way local government is financed until at least 2025/26 financial year, but potentially later. The fair funding review will set new baseline funding allocations for local authorities by delivering an up-to-date assessment of their relative needs and resources, using the best available evidence and not indices from 2013/14. Sitting alongside this is a review of the Business Rates Retention arrangements, which aims to reform the elements of the business rates retention system in England.
- 5.13 While this position is confirmed for one year only, officer's medium-term assumptions are that this recognises a higher funding baseline, including housing, health, social care and market sustainability grants, as the starting point for the fair funding review, but excluding the services grant. Nonetheless, due to the uncertainty surrounding the public finances overall, levelling up and the local government fair funding review, combined with the expectation that there remain growing demands of the people it serves; the Council fully expects to have to continue to seek further savings for future year's budgets.

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5.14 Last year the Council was able to set its budget without needing to use reserves. This year again, the Council has identified the £12.587m of savings necessary to set a balanced budget, being £3.611m identified in setting the budget for 2021/22 and 2022/23 and a further £8.976m identified and brought before Mayor and Cabinet on the 7 December 2022. Assuming the measures proposed and the 2023/24 budget as set out in this report are agreed, the Council can set a balanced budget for the next financial year without using its reserves.

Cost of Living Crisis

5.15 It's estimated that one in four households in Lewisham are now affected by food and fuel poverty with 61,000 local people falling behind on their bills, meaning they require assistance with bills or will be accessing a food bank. On the 23 November Council passed a motion to declare a Cost of Living Emergency, calling on the Government to use its powers to support people through the worst financial crisis to hit the country in decades.

5.16 Lewisham Council has already provided over £7 million worth of support since the pandemic, and as part of the response to the cost of living crisis, from council tax support, food and fuel vouchers, to help with rent payments and securing somewhere to live.

5.17 Since the pandemic Lewisham Council has supported families and residents by:

- Providing £3.1m in council tax support to over 21,000 households
- Distributing £2.67m in food and fuel vouchers
- Awarding £1.6m to almost 700 families to help them cover rent payments and secure somewhere to live
- Making free school meals available in the school holidays to over 11,000 children
- Donating £126,000 to local foodbanks to help meet their demand
- Giving around 3,000 laptops to school children to help them with their studies
- Delivering over 1,200 new social homes between May 2018 and March 2022, providing Lewisham families with a safe, secure and affordable social home
- Leading the South London Energy Efficiency Partnership which has supported more than 5,000 vulnerable and low-income households to reduce their energy costs
- Created the £750,000 Lewisham Works in Lewisham Shopping centre that will work with local businesses to provide skills and employment training to 500 local people
- Launched the £500,000 Lewisham Creative Futures project to support residents, focussed on people with learning disabilities, to work in the digital and creative industries
- Supported 20,855 families with children and 8,832 elderly households with grants from the Household Support Fund to help with food and utility bills
- Reinvested £40m into our local economy through community wealth building policies, helping create well-paid, local jobs for local families

5.18 Councillors also resolved to work with partners to support local communities, particularly the most vulnerable, through the coming months, by:

- Continuing the Warm Welcomes programme across the borough. Twelve warm spaces have opened, run by the council in libraries and council buildings, so people can stay warm during the day and access financial advice and our jobs and skills programmes
- Working with the community, Lewisham Mayoresses and local food banks through the Lewisham Food Action Plan to address food insecurity
- Working with the Citizens Advice Bureau, Lewisham Local, Age UK Southwark & Lewisham, and other organisations within the voluntary and community sector to ensure residents can access the support and financial advice they need

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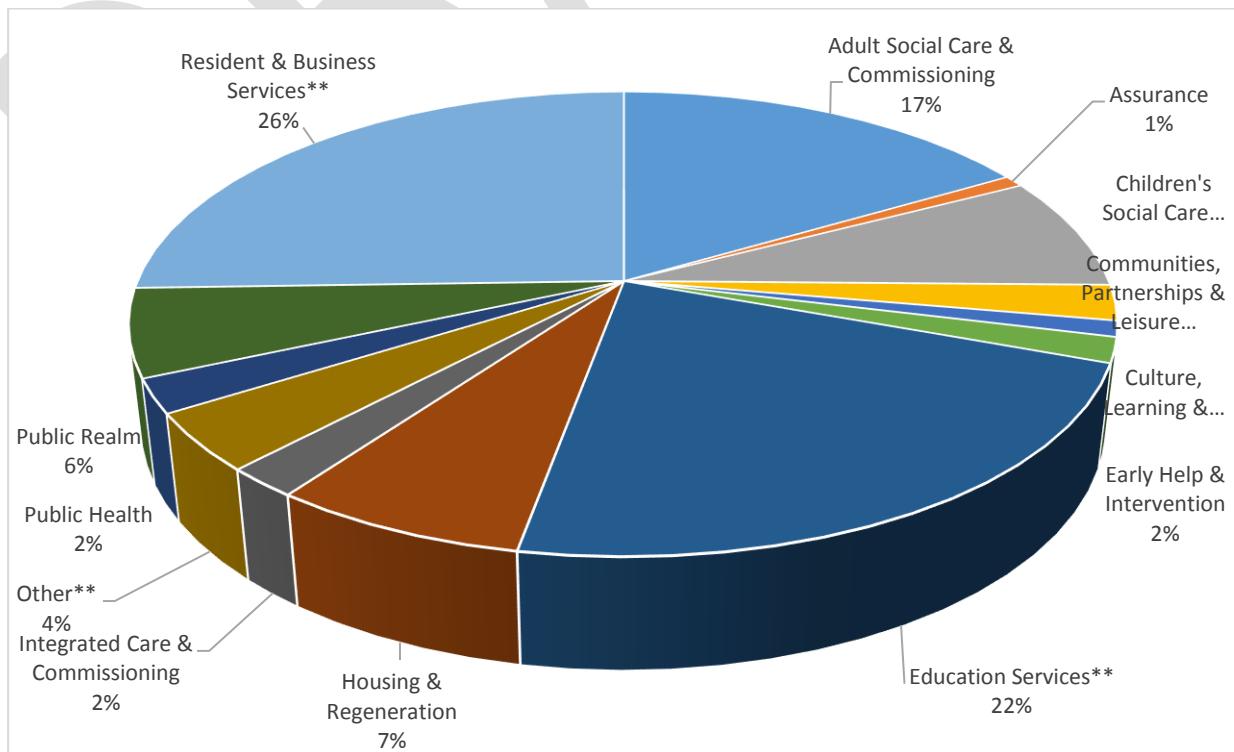
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- Continuing our award-winning apprenticeships programme and jobs and skills service to support Lewisham residents into good, sustainable jobs
 - Building on Lewisham Council's status as a Living Wage Council to become a Living Wage Place to create more well-paid local jobs for local people
- 5.19 The motion includes a call to Government to fund free school meals during school holidays, provide protections to those in the private rented sector, while ensuring that recent commitments in the Autumn Statement around the increase in benefits in line with inflation and tackling low pay are delivered. The motion also points out that everyone pays the same for their energy costs and standing charges, regardless of whether they are on a pre-payment meter or pay via direct debit. With energy bills uncapped, many households will end up spending much more, with those on pre-payment meters paying even more for their energy than those who pay by other methods. This could be up to £1,130 per year.
- 5.20 In addition to Council led programmes, Lewisham is lucky to have an incredible network of community groups, charities and other local organisations, that offer a wide range of support. The webpage found here: <https://lewisham.gov.uk/myservices/cost-of-living> is regularly updated as more information becomes available.
- 5.21 This webpage offers residents links to a range of services to support them during this difficult time, including: food support; coping with debt; warm welcomes; extra support for those with children; support staying warm; help with employment and training; help with household bills; mental health and well-being advice; and finally links for those fortunate enough to be able to support others through donating to the Lewisham Local cost-of-living crisis appeal or through volunteering opportunities with Lewisham Local.

Budget context

- 5.22 The Council spends over £1.2bn annually on services for residents. The gross expenditure budgets for each service area in the Council are as below:

2022/23 Gross Expenditure of £1.28bn



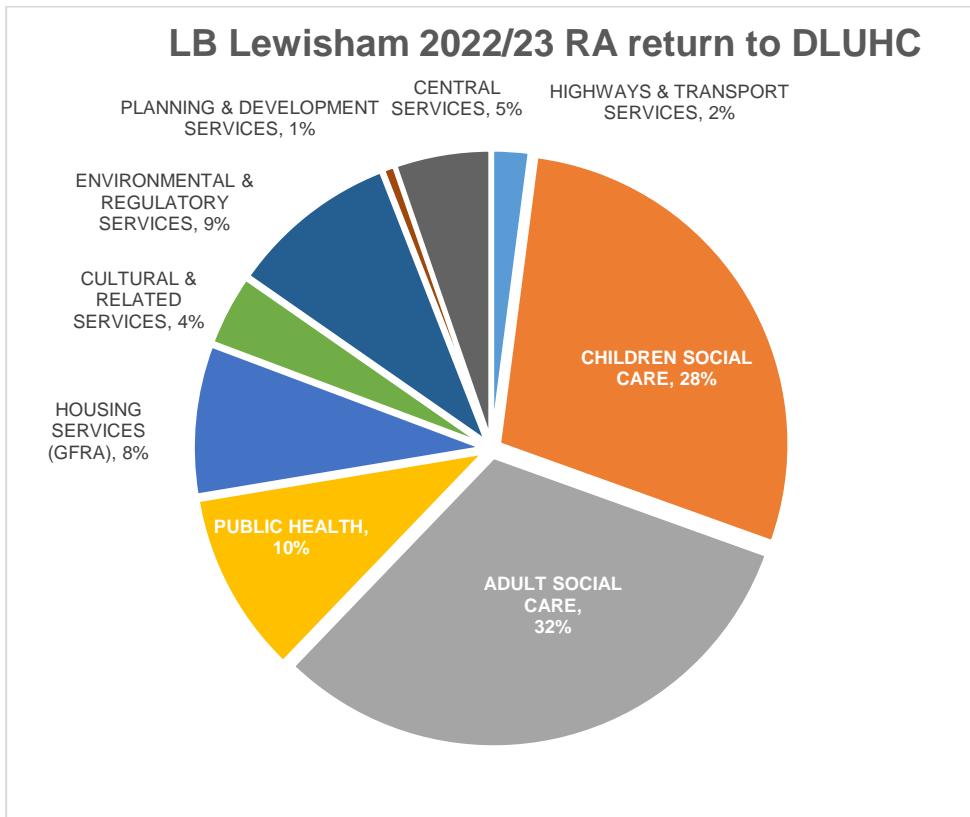
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***The Resident and Business Services and Education Services gross budgets include Housing benefits being transferred to claimants and DSG being transferred to schools.*

- 5.23 In respect of the £340m services element of this annual spend, this is the gross spend built from the £248m general fund budget and income from grants, fees and charges, the money is directed as follows:



- 5.24 The Council serves a population of 300,553 people who live in 130,977 households. Residents of Lewisham are diverse, with people of more than 70 nationalities speaking over 170 languages. The number of residents is also growing; nearly 9% since the last census in 2011 and is higher than both the increase for London of 7.7% and the overall increase for England of 6.6%. Lewisham now ranks 44th for total population out of 309 local authority areas in London, moving up one place in a decade, and is the 13th most densely populated of the 33 London boroughs.
- 5.25 The Council works hard to be available for residents when they need it. Through the Customer Services access point, the Council responds to over 500,000 items of correspondence and receives over 18,000 visits a year. In addition, through the registry office, the Council processes over 7,500 births, deaths and marriages.
- 5.26 In addition to supporting a diverse and growing population, the budget contributes to the Council's commitment to extend local democracy. As a consequence of the Covid-19 pandemic the Council jointly sponsored research with the University of Birmingham into the impact on BAME communities alongside wider socio-economic factors.
- 5.27 While the resettlement of refugees was paused due to the pandemic in 2020/21, in line with the corporate strategy Lewisham has resumed this work and continues to welcome more of those seeking asylum in the UK, including the introduction from 2022/23 of a new 25% 'sanctuary' discount for Council Tax to ensure residents eligible for a single person discount are not financially worse off as a result of housing a refugee. The Council also continues to welcome Ukrainian refugees fleeing the war

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with Russia. In addition to specific support for refugees, the Council provided support for the cost of Council Tax to over 22,000 households.

- 5.28 The budget supports a wide range of age groups across more than 600 individual services.
- 5.29 For young people, the schools' budget provides for 75 maintained schools from nursery level through to secondary. The Borough had the highest school attendance in inner London for primary and secondary, with the lowest persistent absence numbers across inner London. With 96% of pupils attending a "Good" or "Outstanding" school. Furthermore the Council ran over 100 holiday programme days with free activities and lunches for school children and young people aged 4 to 16.
- 5.30 Our Strategic Housing service benefits a large number of residents. The work done with partners to deliver Social Housing and Temporary Accommodation helps provide for the accommodation needs of a quarter of our households with 72,100 households in various forms of social housing and temporary accommodation. The Council made 895 social lets to households on the housing register in the previous year, however the numbers in temporary accommodation continues to rise following both the pandemic and the current cost of living crisis. The Council delivered 626 social homes between 2018 to 2021, and a further 621 are under construction.
- 5.31 The Borough has over 10,000 businesses registered and, in line with our corporate priority to assist with access to high-quality job opportunities, the budget funds adult education and apprenticeships. In the prior year the Council has supported 104 apprentices to undertake work in the borough and helped 46 employees to upskill.
- 5.32 The Adult Social Care service provides a range of support to vulnerable users that helps them remain active and independent, with 1,149 older and vulnerable residents being supported to return to everyday life following a hospital stay. The service undertook 6,046 adult social care assessments and reviews and supported 3,457 older and vulnerable residents to stay independent across all packages of care. As well as physical care needs, these services provide support to those with mental health or disability needs. The work of these services has been under particular scrutiny with the Covid-19 pandemic and the Council has worked closely with the NHS to help manage pressures in the system (in particular hospital discharges). The Social Care reforms which are in part being delayed will impact how we deliver services to residents and the provisional Local Government Settlement includes some funding towards the implementation of this in 2023/24, although more will be required in future years as the full impact of the change in legislation is understood and quantified.
- 5.33 The budget also maintains key universal services such as libraries, arts and entertainment centres and sports and recreation facilities. In the 2021/22 the Council had 475,778 library visits and 724,603 leisure centre visits, a return to pre-pandemic activity more broadly for residents in the borough.
- 5.34 Maintaining a clean and green environment is beneficial for all. The amount of waste recycled, composted or re-used is growing year on year. In 2021/22 the service undertook 39,260 commercial waste, 580,110 green waste and 12,781,730 household waste bin collections, totalling 80,960 tonnes of waste collected and processing 27,005 tonnes of recycling.
- 5.35 The Council is also responsible for maintaining 397km of roads and 12km of footpaths. There was 50,862m² of road carriageway, and 15,238m² of pedestrian footway laid or resurfaced in 2021/22. Council also manages the parking service, including permits and enforcement. These are service areas which will play a significant part in supporting the delivery of a zero-carbon borough. The Council issued 79,629 parking

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permits during the preceding year as activity levels start to recover from the pandemic, although levels continue to remain below pre-pandemic.

- 5.36 Residents enjoy the Borough's green spaces and the budget supports the work that the Green Scene service does to maintain the high standard of Lewisham's parks. There are 47 parks in the borough and 18 of these have the coveted 'Green Flag' rating. Our achievements in this service area have been recognised by our residents with 74% of residents who responded to the 2018 'Parks and Open Spaces survey' felt the standard of the parks in Lewisham has been maintained at a good or fair level.
- 5.37 2022 also saw Lewisham host the Borough of Culture. Created by and with the people of the borough, our year-long programme, We Are Lewisham, is about coming together to create incredible moments of celebration and change. Led by Lewisham Council and the Albany and created by the people of the borough, the programme was inspired by Lewisham's proud history of activism and of standing up for equality. Together, we celebrated the borough's diverse communities and our trailblazers past and present, highlighting the power of culture to create change.
- 5.38 The year long programme included 350 events and counting, from live music and dance to family fun, from Deptford to Downham. Across the year over 200,000 people attended these, including both residents and visitors, coming together to create and enjoy fantastic moments of celebration and change. This could not have been possible without the support of our partners, with over 200 partner organisations working with the Council and more than 1,500 volunteers via our volunteering partner Lewisham Local generously giving their time and energy to make this incredible year happen.
- 5.39 Our children and young people were critical to its success – with over 84% of our local schools involved across our primary and secondary schools. The Creative Futures programme has supported over 1,800 young people, removing barriers and creating accessible opportunities to help 16 -30 year olds enter the creative sector. In addition young people benefitted from career advice, training and mentoring.
- 5.40 The rest of the report sets out the position of the financial settlements as they impact on the Council's overall resources:
- General Fund Revenue Budget for 2023/24;
 - Council Tax level for 2023/24;
 - Other Grants for 2023/24;
 - Dedicated Schools Grant (DSG) for 2023/24;
 - Housing Revenue Account (HRA) and level of rents for 2023/24;
 - Treasury Management Strategy for 2023/24; and
 - Capital Programme for 2022/23 to 2026/27.

6. General Fund Revenue Budget And Council Tax

- 6.1. This section considers the General Fund revenue budget and Council Tax. The General Fund budget for 2023/24, assuming a Council Tax increase of 4.99%, is £263.679m. Details of the budget reduction measures approved for 2023/24 are provided at Appendices Y1 and Y2.
- 6.2. It is structured as follows:
- Update on 2022/23 Revenue Budget;
 - The Budget Model;

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- Budget Reduction Proposals;
- Council Tax for 2023/24; and
- Overall Budget Position for 2023/24.

Update on 2022/23 Revenue Budget

- 6.3. The Council's revenue budget for 2022/23 was agreed at Council on 2 March 2022. The general fund budget requirement was set at £248.610m.
- 6.4. The financial position of the council is monitored on a monthly basis by officers with support from the Finance team, these monitoring reports have been presented quarterly to Mayor and Cabinet and scrutinised by the Public Accounts Select Committee.
- 6.5. Budget holders are challenged to maintain a tight control on spending throughout the year. The Council operates a devolved system of financial accountability with clear delegations and responsibility set out in the financial and procurement regulations and schemes of delegation in the Constitution.
- 6.6. The July budget monitoring report was reported to Mayor and Cabinet in September 2022, this report presented a pressure of £6.5m on General Fund budgets after the application of £4m remaining £4m Covid Local Authority support grant as well as £7.6m of corporate funding to cover items such as the unbudgeted element of the proposed pay award of £4.5m.

Directorates

- 6.7. Table A1 sets out the latest forecast budget variances on the General Fund by Directorate based on December budget monitoring.

Table A1: Forecast outturn for 2022/23 as at end of December 2022

General Fund	Net budget 2022/23	Forecast Outturn 2022/23	Period 8 Forecast Variance 2022/23
	£m	£m	£m
Children & Young People	61.3	71.2	9.6
Community Services	82.4	84.5	2.1
Housing, Regeneration and Public Realm	21.7	27.7	6.0
Corporate Resources	32.4	32.4	0.0
Chief Executives	11.8	11.8	0.0
Salary and Energy Pressures	0.0	6.6	6.6
Directorate Totals	209.6	234.3	24.3
Covid Funding	0.0	(4.0)	(4.0)
Reserves	0.0	(6.6)	(6.6)
Corporate Items	39.0	36.9	(4.1)
Corporate Budget	39.0	26.3	(14.7)
Total	248.6	260.6	9.6

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- 6.8. The paragraph below explains the reported position at Period 8 in more detail:
- Children and Young People £9.6m Pressure
- 6.9. **Children's Social Care:** A £8.1m pressure is reported on the service. There are currently 458 Children Looked After (CLA) at the end of November 2022, compared to 465 CLA's in November 2021. Placements is a demand led budget, with the cost of placements dependent on the needs of the child. However, it is important to note that whilst edge of care preventative interventions helps to manage placement demand, the children who do enter care are the most complex and require higher cost placements. The expenditure forecast is comparable with the level of expenditure incurred in 2022/23 suggesting that additional costs incurred due to Covid remain within the system or have been replaced by costs at a similar level.
- 6.10. **Education Services:** £2.8m pressure across the service due to recruitment challenges in Education Psychology leading to increased agency usage of £0.5m and £0.3m on Continuing Care due to the level of complexity and associated costs of children with complex needs. There is a £2m overspend on Home to School Transport, the number of Children being transported to schools by taxi's has increases significantly since 2019/20 with the percentage of Children being transported out of borough (longer, more costly journeys) also increasing.
- 6.11. **Family, Quality and Commissioning:** £1.3m underspend due to robust management of the staffing budget, service delivery has been reviewed and a restructure was undertaken however some elements are yet to fully implemented leading to posts still being vacant.
- Communities £2.1m Pressure
- 6.12. **Adult Social Care:** A pressure of £1.9m is reported due to the delayed delivery of savings related to care packages as well as pressures from children transitioning to Adulthood and hospital discharges. This is based on the level of commissioned care on Controcc at Period 8 with adjustments made for anticipated further in year demand and inflationary increases, as well as adjustments for any health funding or savings delivered over the course of 2022/23.
- 6.13. **Community, Leisure and Partnerships:** A pressure of £0.1m is reported due to reduced income generation compared to the budgeted level on bereavement services.
- 6.14. **Culture, Learning and Libraries:** A pressure of £0.1m is reported for the service as a result of an income shortfall for the Libraries Service where the level of income has not recovered to pre Covid levels.
- Housing, Regeneration and Public Realm £6m Pressure
- 6.15. **Strategic Housing:** A pressure of £4.5m is reported on Temporary Accommodation, after the application of available grant funding. The number of people accommodated in nightly paid accommodation has risen from 745 at the start of April 2021 to 1,031 at the end of November 2022. The monthly average number of people accommodated for financial year 2021/22 was 865, the current monthly average for 2022/23 is 1,018. This increase in numbers has put additional pressure on the service in terms of landlord payments and recharges for Housing Benefit payments which have exceeded the caps and limits (otherwise known as HB limitation recharges) and therefore not payable through the DWP Housing Benefit claim. These are currently forecast to be £10m in Period 8, which is £2.5m over and above the budgeted level.
- 6.16. The remainder of the pressure is due to £1m of incentive payments to Landlords over and above the budgeted level, these payments are made to maintain housing arrangements for people at significant risk of becoming Temporary Accommodation Service users. A further £1m pressure is due to prior tenant arrears from unpaid rental income (over and above the housing benefit contribution) that people make towards

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their nightly paid accommodation. Once the service users have moved out of nightly paid accommodation this income is extremely challenging to recover.

- 6.17. **Public Realm:** A pressure of £1.2m is arising due to an overspend of £0.4m in relation to the cost of an enhanced Fly Tipping Service, and a highways and transport pressure of £0.8m.
- 6.18. **Regeneration:** There is a £0.3m pressure on the service despite the shortfalls against Copperas Street, Hughesfield and Downham Enterprise, the commercial income portfolio has seen a slight uplift through rent reviews across the estate. This is because some of the rents (particularly for the Old Town Hall) are RPI index linked, and the current rate of inflation has led to higher than expected rises in rents across the portfolio. This has had an overall positive impact on the current projected income from the estate.

Corporate Resources Balanced

- 6.19. **Assurance:** An underspend of £0.1m due to staff vacancies across the teams.
- 6.20. **Finance:** An underspend of £0.2m due to staff vacancies across the teams.
- 6.21. **Residents and Business Services:** A net pressure of £0.3m. There is a £1.2m pressure on the staffing budget within Revenue and Business Services, as the service restructure was delayed due to additional workload arising from the administration of several central government grants including the Council Tax Energy Grant, Household Support fund and Covid Additional Relief Fund (CARF). The employee pressure is partially offset by a £0.5m underspend due to the reduction in supported accommodation costs and an underspend within the Facilities Management service area of £0.4m largely due to an underspend on cleaning services.

Salary and Energy £6.6m Pressure

- 6.22. **Staff Pay Award:** The financial impact of the pay award over and above the budgeted level is £4.1m, this is after the recent reversal of the National Insurance (NI) increase.
- 6.23. **Energy Tariff Increases:** The energy pressure over and above the budgeted level due to tariff price rises is £2.5m, this is further broken down as; £1m on Corporate Buildings, £0.6m on the Council's Leisure contract, £0.2m on Glassmills Leisure centre which sits outside the main leisure contract, £0.6m on Street Lighting and £0.1m within Regeneration for buildings they operate.
- 6.24. Officers are working hard to reduce the financial pressure further between now and the end of the financial year. The final position will be declared in the outturn report to Members.

Corporate Financial Provisions

- 6.25. Corporate Financial Provisions are budgets that are held centrally for corporate purposes and which do not form part of the controllable expenditure of the service directorates. They include Capital Expenditure charged to the Revenue Account (CERA), Treasury Management budgets such as Interest on Revenue Balances (IRB) and Debt Charges, Corporate Working Balances and various provisions for items such as early retirement and voluntary severance.
- 6.26. Spend of the Corporate Financial Provisions is expected to be £4.1m less than budget which consists of monies to be held for inflationary pressures and to support service risks released against the CYP overspend in line with the previously agreed budget reduction measures to reduce the persistent overspend. There is also an underspend in the concessionary fares charged by TfL (expected to increase in 2023/24) and interest earned from cash balances due to the Bank of England increases in the base rate over the previous six months. The increases in interest earned has been built into the savings proposals for 2023/24.

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- 6.27. Consideration is now being given to employing the use of further corporate measures to balance the budget at year end. It is proposed to meet the 2022/23 budget overspend from provisions if available and then reserves if required, with the final position declared in the outturn report to Members.

The Budget Model

- 6.28. This section of the report sets out the construction of the 2023/24 base budget. This section is structured as follows:
- Budget assumptions, including: Budget Reductions, Council Tax, and Inflation;
 - Budget pressures to be funded; and
 - Risks and other potential budget pressures to be managed.

Budget assumptions, including: Cuts, Council Tax, and Inflation

- 6.29. The Council has made substantial reductions to its expenditure over the last thirteen years. Subject to the outcome of the multi-year Comprehensive Spending Review (CSR) and the outcome of the government's fair funding review, now not expected earlier than 2025/26, the Council expects to continue to need to make further reductions for at least the next three to four years. This section of the report summarises a series of proposals that would enable the Council to set a balanced budget for 2023/24 as part of a sustainable financial strategy to 2026/27.

Council Tax

- 6.30. Since 2016/17, the government has allowed councils with social care responsibilities to apply a percentage increase on council tax (the Social Care precept), the funds of which are ring-fenced to Adult Social Care (ASC) services. To date, Lewisham has applied a 14% increase over the seven year period. The government is once again allowing councils to apply a precept for 2023/24 and 2024/25 of 2%. For 2023/24 this will generate £2.525m of additional income for ASC services. This report proposes that the Mayor recommends that Council approve the 2% ASC precept for 2023/24 to obtain the maximum benefit permitted.
- 6.31. The provisional Local Government Finance Settlement announced on the 19 December 2022 confirmed the intention for a core council tax referendum principle of up to 3% in 2023/24 and 2024/25, as announced at the Autumn Statement on the 17 November 2022. This is in addition to the flexibility to raise the Social Care Precept set out above.
- 6.32. The assumption used in the model for preparing the 2023/24 budget, subject to confirmation by Council, is for a total Council Tax increase (Lewisham element) of 4.99%. A 2% increase for the social care precept and a 2.99% increase in the core element.
- 6.33. Should Council choose to set a different Council Tax increase, Members will need to be mindful that any increase below this recommendation will result in additional budget pressures, resulting in greater use of resources in the short term and a higher budget reduction requirement going forward. Any increase in the core element above this recommendation would require support in a local referendum due to the limit set by the Secretary of State.
- 6.34. Further information on the options for Council when setting the Council Tax is set out in more detail towards the end of this section.

Inflation

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- 6.35. The Government's inflation target for the United Kingdom is defined in terms of the Consumer Price Index (CPI) measure of inflation which excludes mortgage interest payments. Since April 2011, the CPI has also been used for the indexation of benefits, tax credits, and public service pensions.
- 6.36. 2022 has seen CPI reach 40 year highs, with the rate continuing to rise throughout the year and reported at 10.7% in November 2022. At the point of agreeing its Medium Term Finance Strategy in July 2022, the Council was assuming to budget 3% for pay award and 2.5% for non-pay inflation. There was a further allowance of £5m to cover a combination of Covid 'drag' and unfunded inflation. The Council was assuming that the energy pressures for 2023/24 would be funded via once off funding (either grant or reserves) and would not be funded via base budget. At that point no agreement had been reached for the 2022/23 pay award.
- 6.37. Over the Autumn CPI continued to increase and the pay award was agreed which equated to almost 6% increase in budget terms and a pressure of £4.1m above the allocated funding for 2022/23. This has led to a revision of the inflation funding assumptions for 2023/24 with a proposed pay award allocation of 5% and non-pay inflation budgeted for £5m. These proposed budgets have increased from the MTFS but there remains some risk that if inflation does not return to the Bank of England's long term forecast of 2% as quickly as expected that there may be additional pressures in 2023/24 or 2024/25. This will be reviewed and reported to Members as part of the 2023/24 MTFS process and regular financial monitoring.
- 6.38. Unless pre-defined by statute or otherwise agreed, all services are expected to uplift their fees and charges annually in line with inflation, or for full cost recovery if this is higher, to allow for stability in real terms.

Budget Pressures to be funded

2022/23

- 6.39. In 2022/23, the funds set aside in the budget model to meet specific identified budget pressures and potential budget risks was £6.500m. This was supplemented by £1.950m of additional Social Care grant uplift, the £0.923m of the new Market Sustainability and Fair Cost of Care Fund grant and the ASC precept of £1.227m to fund £10.600m of identified risks and pressures.

2023/24

- 6.40. The MTFS for 2023/24 sets aside a further £25.131m for inflation, budget pressures and risks. To this it is recommended that the £1.899m of the £3.852m of additional social care grant which was received for 2022/23 but not taken into base budget be used to address current pressures. It is also recommended that the new £3.203m ASC Market Sustainability and Improvement Fund (which is netted off against the £0.923m Market Sustainability and Fair Cost of Care Fund grant which falls away) be included. In addition the uplift in the Social Care grant of £8.780m will be included (although netted off against the Independent Living Fund which has been rolled into this). These actions will provide £37.513m to be allocated to selected budget pressure and growth areas that will present as challenges in future budgets if not corrected. See section 7 below for more detail on these grants for 2023/24.
- 6.41. To the funding of these pressures can be added the NHB of £0.114m, and a second year, although reduced, allocation of the Services Grant of £3.696m for 2023/24. These will fund once off pressures given the temporary nature of these grants.
- 6.42. In terms of accounting for these, it is proposed that these investments and pressures are allocated in line with the decisions of this budget from the corporate risk and pressures monies and £2.525m from the Social Care precept to the relevant Directorates when determining their cash limits for 2023/24.

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- 6.43. Using cash budgets (in particular grants such as the Social Care Grant and ASC Market Sustainability and Improvement Fund) presents a risk for future years, although the medium planning assumptions are that this level of funding for 2023/24 from government is in recognition of the pressures faced by local authorities and will effectively form the baseline pending fair funding review.
- 6.44. The budget pressures anticipated in 2023/24 have been reviewed and it is recommended that the following identified pressures are funded now, set against the Corporate Strategy priorities.
- 6.45. Table A2 provides a summary of the corporate risk and pressures budget and those pressures and risks that are being recommended to be funded. The detail of these and the allocation between once off and ongoing funding is in Appendix Y7.

Table A2: Summary of 2023/24 budget pressures to be funded

Description	£'000	£'000
Social Care precept	2,525	2,525
<u>Ongoing</u>		
Inflation, Risk & Pressures budget available in 2023/24	25,131	
ASC Market Sustainability and Improvement Fund (net)	2,280	
2022/23 Social care grant (additional)	1,899	
2023/24 Social care grant (additional and net of Independent Living Fund)	8,203	37,513
<u>Once-off</u>		
New Homes Bonus	114	
Services Grant	3,696	3,810
Total Resources Available for Risks and Pressures in 2023/24		43,848
Recommended Allocations		
Corporate Strategy priorities		
<i>Open Lewisham</i>	-1,022	
Local Support Schemes		
Borough of Sanctuary		
Planning		
<i>Quality Housing</i>	-4,100	
Temporary Accommodation		
Strategic housing		
<i>Giving Children the best start</i>	-1,500	
Schools and School Transport		
<i>Strong local economy</i>	-600	
Business rates revaluation		
Asset income generation		
<i>Health and wellbeing</i>	-6,918	
Changes in care needs and demand		
Market Sustainability and Fair Cost of Care		
Capital investment		
Leisure support		

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Description	£'000	£'000
Cleaner and greener Environment Services - waste Fly tipping Parking Safer Communities Catford library	-1,650 -200	
Total Corporate Strategy priorities		-15,990
Organisational value for money Corporate Services Technology and Audit Centralised income achievement Revenues and Benefits		-5,307
Energy		-6,327
Salary inflation for 2023/24		-7,120
Salary uplift shortfall for 2022/23		-4,104
Non-pay inflation for 2023/24		-5,000
Grand Total Funded Pressures		-43,848

Open Lewisham – £1.022m

- 6.46. The commitments to this priority include additional resource to ensure that the Council can deliver on its priority as being a borough of sanctuary. In order to ensure that our residents most in need of support receive this, there is the need to ensure that the funding for the local support schemes is maintained to the appropriate levels, this is even more vital in the current cost of living crisis. Government has also announced that the LCTS administration grant will be rolled up into the SFA, meaning that this ring fenced funding stream will fall away. The Council's Planning service is critical to keeping Lewisham open and ensuring that it can continue to grow and thrive as a place for both residents and businesses. Legislative and service changes have necessitated additional funding into the service.

Quality Housing – £4.100m

- 6.47. The costs and demand for temporary accommodation has increased significantly as an outcome of both the Covid pandemic and the current cost of living crisis which outstrips the current grant allocations. There is also additional pressures on the housing budget due to income generating schemes not progressing as expected.

Children and Young People - £1.500m

- 6.48. There is a statutory requirement to provide home to school transport for children with Educational Health & Care Plan where the plan specifies a transport service. From 2015 to 2021 the number of EHCPS in Lewisham increased by 107.1% from 1,408 to 2,916. The number of ECHPs in Lewisham now stands at 3,317, representing a further 13.8% increase since the January 2021 SEN2 census date. The service has committed to reduce the persistent overspend in this service, but it is proposed that this is part funded to enable a base budget that better reflects the increased level of need.

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Strong local economy - £0.600m

- 6.49. The Council seeks not only to provide high quality social infrastructure (schools, roads, homes etc) to support its residents directly, but to also ensure that it plays a role in place shaping within the borough and seeking to generate long term income streams from assets to support service delivery. The pandemic and ensuing economic inflation has meant that some income generating asset schemes have not been able to be delivered as planned. Furthermore, whilst the Council constantly looks to make best use of its asset base, the introduction of the 2023 ratings list by the Valuation Office has meant that the budget for paying business rates is under pressure.

Health and Wellbeing - £6.918m

- 6.50. This proposed budget increase applies the Social Care precept and the ASC Market Sustainability and Improvement Fund to support the work of Adult Social Care services. This will enable the service to ensure that the legislative changes and reform implementation, especially the Fair Cost of Care and able to be delivered in line with Government requirements whilst not destabilising an already fragile marketplace for care services. The funding available for discharge costs will also be used within this service, but will replace existing funding available from the ICB. The specific funding available for 2023/24 will allow the Council to fund capital investment in infrastructure, reducing our reliance on independent providers. There is also the need to fund pressures in leisure as this sector was only just returning to pre-pandemic levels when the cost of living crisis (including energy costs) took effect.

Cleaner and Greener - £1.650m

- 6.51. The risk and pressures to be invested against this priority aim to support the Council's commitment to be carbon neutral by 2030 in line with the declared climate emergency. This includes investing in the Council's waste collection services, which are experiencing very high levels of inflation coupled with the permanent growth in volumes as post pandemic more people continue to work from home to a greater extent. The Council is also committed to taking action against fly-tipping and investment is required for this service. Finally, the Council adopted an emissions based charging policy for parking in 2021 to support the ambition of carbon neutrality by 2030. The Council's plans to roll out Controlled Parking Zones across the borough remain under review and development, and the pace of this is creating pressures within the service which require once off support.

Safer Communities - £0.200m

- 6.52. The Catford Library has been relocated out of Laurence House and into the Catford Centre, putting this service at the heart of the town centre for the residents of Catford. This funding for 2023/24 will ensure that the library has a sustainable budget going forward.

Organisational value for money - £5.307m

- 6.53. In addition to the corporate strategy the Council is a large and complex organisation. Through the decade of austerity to 2022 the Council's support services have borne a significant proportion of the budget cuts. This was recognised in the 2019/20 and 2020/21 budget round and this investment is to reverse some previously agreed cuts and enhance the resourcing for some of these services. In particular; resident services and technology – which has underpinned the Council's ability to transform its ways of working and engagement with residents during and post pandemic. In addition work as part of the capital strategy is underway to assess the level of capital investment required to sustain the Council's technology infrastructure in a secure, resilient, and optimal state. Whilst many services have transferred more and more content and resident engagement onto digital platforms, the digital divide – made more acute during the cost of living crisis – has meant that support is needed for both the digital content

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functions and the call centre to ensure that we continue to support our residents using all forms of communication. In prior years savings have been put forward predicated on increasing our attainment of income, mainly Council Tax and sundry income, either through service redesign or through increased collection. The Covid pandemic saw a 3% fall in the collection rate of Council Tax and whilst this has recovered in part it remains slightly below pre-pandemic levels and below that assumed in the MTFS. The Council now needs to unwind these proposals to ensure that these reflect reality.

Energy - £6.327m

- 6.54. The war in Ukraine saw energy costs soar, with energy being the single biggest element driving the current levels of inflation. The Council will fund the additional costs of energy in 2022/23 via reserves or corporate provisions if possible, and in the MTFS was assuming that these would similarly be funded from reserves or once off grants in 2023/24. However, with the removal of Government support for Council's energy costs, and the forecast of these taking longer than originally anticipated to return to normal levels, it is deemed prudent to fund circa 50% of the anticipated energy increases in base budget for 2023/24 and fund the remaining 50% using once off grants funds.

Salary inflation 2023/24 - £7.120m

- 6.55. The 2023/24 assumed salary uplift has been based on a pay award of 5%. This reflects both the final 2022/23 agreement which averages to almost 6%, and the current and forecast levels of inflation anticipated for 2023/24. This is 2% more than the 3% assumed within the MTFS.

Salary inflation 2022/23 unfunded - £4.104m

- 6.56. The 2022/23 budget of £2.7m for the pay award was equivalent to 2%, this was set in the absence of an agreed position. The final agreed settlement equates to an average uplift of circa 6%, which has created an assumed budgetary pressure of £4.104m which has been funded from reserves or corporate provisions. This increase needs to be permanently funded in 2023/24.

Non-pay inflation - £5.000m

- 6.57. The MTFS assumed a 2.5% uplift for non-pay inflation with a potential allowance within the £5m pressures funding earmarked for both unfunded inflation and Covid 'drag'. Given the increase in CPI during the year this has been increased to £5m, which represents a circa 5% budget uplift. This is in addition to any specific pressures funding set out above, and it's the Council's assumption fees and charges are uplifted by inflation to partially offset this pressure.
- 6.58. Following the review of budget pressures within Directorates, there are a number of other risks and issues which, although difficult to quantify with absolute certainty, could prove significant should they materialise.
- 6.59. Officers continue to undertake work to fully assess and monitor these risks. These risks and other potential budget pressures are discussed in more detail below:
- Childrens Social Care placement costs
 - Legislative or policy changes
 - Service Investment
 - National / London Living Wage;
 - Redundancy;
 - Unachieved budget reduction; and
 - Further inflation.

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Childrens Social Care placement costs

- 6.60. A £8.1m pressure is reported on the service. There are currently 458 Children Looked After (CLA) at the end of November 2022, compared to 465 CLA's in November 2021. Placements is a demand led budget, with the cost of placements dependent on the needs of the child. However, it is important to note that whilst edge of care preventative interventions helps to manage placement demand, the children who do enter care are the most complex and require higher cost placements. The expenditure forecast is comparable with the level of expenditure incurred in 2022/23 suggesting that additional costs incurred due to Covid remain within the system or have been replaced by costs at a similar level. The service is continuing to seek to reduce these costs but in the event that they are not contained then these may place pressure on the 2023/24 budget.

Legislative or policy changes

- 6.61. There are a number of areas within the Council where it is expected that government will introduce new legislation or policy which will require service changes and drive cost increases. Specifically in waste services, where Government has consulted on resource and waste strategy reforms. There are 3 main reforms proposals:
- A Deposit Return Scheme for drinks containers, where consumers will be incentivised to take their empty drinks containers to return points hosted by retailers.
 - Extended Producer Responsibility for packaging, where manufacturers will pay the full costs of managing and recycling their packaging waste, with higher fees being levied if packaging is harder to reuse or recycle.
 - Consistency in household and business recycling collections. The Environment Bill requires all local authorities to arrange for the collection of glass, metal, plastic, and paper and card, from households, for recycling. Domestic properties to receive separate weekly food waste collections from households, including flats, proposal for the free collection of garden waste and to provide separate collections for dry recycling.
- 6.62. Though Lewisham currently provide the collection of the glass, metal, plastic, paper and card from household and offers the service to businesses within the borough, we collect co-mingled. Once guidance has been provided, Lewisham will need to carry out a TEEP assessment, to assess whether a single stream service would be technically, environmentally and economically practicable (TEEP). Lewisham also provide a weekly collection of food waste from kerbside properties; this will now need to be rolled out across the borough to estates and flats.
- 6.63. We also currently charge for garden waste collections and there is a possibility that this will now need to be provided for free. Though all LA's have argued this point, there is a possibility that this won't be approved.
- 6.64. As stated above we are still awaiting on further guidance on the reforms and how the calculation will work for any funding that Council's will receive to assist with the cost for vehicles and containers, but some of these changes are due to be implemented in 2024, excluding the roll out of food waste which is currently due to commence 2023/24.
- 6.65. The expansion of the Ultra Low Emission Zone (ULEZ) will assist in reducing carbon emissions and improving air quality in the borough but may also have a negative impact on parking and highways income streams.
- 6.66. Similarly, the roll out of a borough wide CPZ programme is being consulted on, and the outcome of that may also impact on the delivery of previously agreed income increases predicated on this programme.
- 6.67. Whilst government has provided some grant funding to address the introduction of the Fair Cost of Care the implementation of a number of other care reforms has been

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delayed and it is not yet clear whether government will fund these, either in part or in full, and this presents a risk to adult social care budgets.

- 6.68. In 2020, DLUHC introduced a statutory override that separated local authorities; Dedicated Schools Grant (DSG) deficits from the wider finances, the effect of this override is that the council does not need to make provision from our general reserves to cover the DS deficits. The statutory override was due to end at the end of 2022/23 but has recently been extended. However, the extension of the override is not permanent and the DSG deficit is forecast to be circa £15m by the end of 2022/23. In the event that the override was removed this risk and deficit would fall to the general fund reserve and budget to meet.

Service Investment

- 6.69. It may be that in addition to the broader, macro-economic pressures set out below, that specific service pressures will arise in year that cannot be contained within existing budget and will require specific and additional funding.

National / London Living Wage

- 6.70. The Council has for some years now ensured it pays the London Living Wage to staff and contractors where this has been possible to contract for. However, there have remained some areas where this has not always been possible – for example; sub-contractors on some works contracts and contracting for some care services. The recent increases in living wage and focus on modern slavery and ethical charter considerations in procurement rules go some way to closing this remaining gap to ensure all employees are paid a fair wage.
- 6.71. The budget impact of these changes is a risk of additional contract costs to the Council. These will vary according to the contract and areas of spend depending on past practice and how suppliers elect to pass on some or all of these costs. The risk cannot therefore be easily quantified at this time.

Redundancy

- 6.72. The Council will seek to minimise the impact of cuts on services and jobs. However, a significant proportion of the Council's budget goes on staff salaries and wages, so it will not always be possible to make significant investments in service transformation and redesign to achieve budget cuts over the next four years without an impact on jobs. The cost of redundancy depends on age, seniority, and length of service of the individuals affected, and it is not possible to calculate the overall financial impact at this stage. For these reasons the risk cannot be easily quantified at this time.

Unachieved Budget Reductions

- 6.73. The strategic governance process for monitoring the delivery of agreed budget reduction measures, overseen by EMT, will provide visibility of progress, risks, challenges and robust governance of the programme as a whole. Alongside, the PMO will be monitoring and reporting on programme-wide delivery of cuts, risks and equalities impact. Clear roles and responsibilities (between the PMO and service Directors) have been drawn up in order to ensure there are clear lines of accountability.
- 6.74. In the event that this approach cannot ensure the full delivery of the budget cuts and pressures arise in the year and are not able to be contained with Directorate budgets, they may become an additional call on corporate provisions and reserves until alternative cuts are agreed and implemented.

Summary of Budget Pressures and Investment

- 6.75. In conclusion, it is a matter of good budgeting to make a general allowance for risk and uncertainty, particularly at such a time of rapid change in the local government sector.

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- 6.76. There are some pressures to be funded, which can be quantified within a reasonable range. These fully commit the MTFS allocation and additional resources received for 2023/24.
- 6.77. There are also a number of other risks and potential budget pressures to consider which are less easy to quantify with any certainty which may become an additional call on reserves through the year if they arise. These will be regularly monitored and reported.

2023/24 Budget Reduction Proposals

- 6.78. On the 7 December 2022, the Mayor and Cabinet agreed £14.437m of budget reduction proposals for 2023/24, of this £3.611m are proposals which were considered as part of the 2021/22 and 2022/23 budget setting exercise and a further £10.826m of proposals which were identified in 2022. The £10.826m of proposals included both Executive and non-Executive decisions with Mayor and Cabinet approval required for £1.378m and £9.448m of proposals which are decisions not requiring Mayor and Cabinet approval. Of the non-Executive proposals, COR_SAV_01 which is a £500k reduction in the annual cost of the employer's pension contribution, has been increased to £650k as the triennial valuation of the pension fund has completed enabling the actual saving to be quantified. Cut ALL_SAV_01 which was the £2m absorption of the unfunded pay award has been reversed as proposals to achieve this cut were not able to be identified. A summary of these cuts is attached as Appendix Y1 and Y2 to this report.
- 6.79. These net budget reduction measures of £12.587m have been included in the 2023/24 budget calculation. They must be achieved in order to maintain a balanced budget and manage the persistent overspend. The delivery of these cuts will be monitored, any shortfall will have to be covered, in the short term pending services offering alternative proposals, through the use of reserves.
- 6.80. No clear estimates for Settlement Funding Assessment (SFA) in 2024/25 have been provided by the Government. 2023/24 is effectively a roll forward year for the SFA, with some adjustments for inflation and additional social care funding and the outcome of the fair funding review is not expected later before 2025/26. The prospects for future funding remain uncertain.

2023/24 Council Tax

- 6.81. In setting the Council's annual budget, Members need to make decisions in respect of the Council Tax.

Collection Fund

- 6.82. Collection Fund surpluses or deficits reflect whether the Council over or under achieves its Council Tax collection targets. Therefore, this requires a calculation to be made of how much the Council has already received for the Council Tax in the current and past years and how much of the outstanding debt it expects to collect.
- 6.83. The statutory calculation was carried out for the 15 January (date prescribed by the relevant statutory instrument). This calculation showed there is an estimated surplus on the Collection Fund in respect of Council Tax, for the years to 2022/23 of £398,403. This reflects the ongoing work of the Public Services team to carefully collect all monies owing to the Council and the adjustment made to the assumed collection rate given the impact of Covid-19.

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- 6.84. This surplus is shared with the precepting authority, the Greater London Authority (GLA), in proportion to relative shares of budgeted Council Tax income in the current financial year. Taking account of the cumulative surplus and the forecast contributions for prior year deficits, £302,871 is forecast to be the net surplus to be included in the calculation of Lewisham's budget as the additional Council Tax collected in year and transferred to a collection fund reserve for future year deficits. The remaining balance of £95,532 is allocated to the GLA.

Council Tax Reduction Scheme

- 6.85. Members should note that the Council agreed on the 18 January 2023 that no changes are to be made to the Council Tax Reduction Scheme (CTRS) for 2023/24 and that the Council should continue to pass on the government cuts in funding to working age claimants. Members agreed that the fixed percentage reduction in liability for the working age claimants of the scheme should remain at 25% for 2022/23. This means that everyone of working-age has to continue to pay a minimum of 25% of their council tax liability.

Council Tax Levels

- 6.86. In the 2023/24 provisional Local Government Finance Settlement, the Government announced a 3% limit to the amount by which Councils can increase their Council Tax (inclusive of levies) without a referendum. In addition, there is also the opportunity to increase Council Tax by up to a further 2%, for the Social Care Precept in 2023/24 and 2024/25. The government's assumptions in the local government finance settlement 2023/24 include the raising of both Council Tax and the Social Care precept in each and every year to meet the recognised funding pressures faced by the sector.
- 6.87. In 2023/24, the recommendation is that the Council approve a 2% Social Care precept which will provide additional funding of £2.525m, ring fenced for Adult Social Care spend. If implemented this charge has to be identified on the face of the Council Tax bill and made clear in the accompanying guidance for rate payers.
- 6.88. At the same time an increase in core Council Tax of 2.99% (i.e. within the limit of the 3% referendum threshold) would provide additional funding of approximately £3.776m.
- 6.89. In considering budget reduction proposals and the level of Council Tax, Members make political judgements, balancing these with their specific legal responsibilities to set a balanced budget for 2023/24 and their general responsibilities to steward the Council's finances over the medium term.
- 6.90. In 2022/23, the Band D Council Tax in Lewisham is £1,816.81 on a base of 88,904.9 Band D equivalent properties. Of this, £395.59 relates to the activities of the GLA which the Council pays over to them on collection, Lewisham's element is £1,421.22.
- 6.91. The GLA is consulting on a precept of £423.4 (Band D equivalent) for 2023/24, an increase of £27.89 or 7.05%, and a final decision is expected from them on or after the 23 February 2023.
- 6.92. For 2023/24, the Band D Council Tax in Lewisham is recommended to be £1,926.27 on a base of 88,848.5 Band D equivalent properties (the base was approved by Council on the 18 January). Of this, £434.14 relates to the activities of the GLA which the Council will pay over to them on collection. Lewisham's element will therefore be £1,492.13, which includes a 2023/24 increase of £70.91 (4.99%).
- 6.93. Table A3 below shows, for illustrative purposes, the Council Tax payable by a Lewisham resident in a Band D property in 2023/24 under a range of possible Council

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Tax increases, and the financial implications of this for the Council. A full Council Tax Ready Reckoner is attached at Appendix Y4.

- 6.94. The starting point is for an assumed 4.99% increase in Lewisham's Council Tax for 2023/24, which includes the maximum core increase permissible without a referendum. Any reduction from this level of increase will reduce the level of income the Council collects and will increase the draw on reserves for 2023/24 and the budget gap in future years.

Table A3 – Band D Council Tax Levels for 2023/24

Amounts payable by residents - Band D					
Change in Lewisham Council Tax	Lewisham element	GLA element	Total Council Tax	Increase in overall Council Tax	Lewisham Annual income forgone
	£	£	£	%	£m
4.99% increase	1,492.13	434.14	1,926.27	6.02	-
3.99% increase	1,477.92	434.14	1,912.06	5.24	-1.263
2.99% increase	1,463.71	434.14	1,897.85	4.46	-2.525
1.99% increase	1,449.49	434.14	1,883.63	3.68	-3.788
1.00% increase	1,435.42	434.14	1,869.56	2.90	-5.038
0.50% increase	1,428.32	434.14	1,862.46	2.51	-5.700
Council Tax Freeze	1,421.22	434.14	1,855.36	2.12	-6.300

- 6.95. In January 2023 at the Council meeting, Council set the Council Tax base for 2023/24 and agreed the maximum incentives available to bring properties back into use including the new policy of removing the 100% discount awarded for a period of four weeks to empty homes – Class C (a substantially empty and unfurnished property). Council also agreed to continue the Council Tax exemption for Care Leavers up to the age of 25 in the Borough and the 25% sanctuary discount to residents currently in receipt of a single person discount who accommodate a refugee in their home.

Levies

- 6.96. There are three bodies which charge a levy against Lewisham's Council Tax: the London Pensions Fund Authority (LPFA); the Environment Agency; and the Lee Valley Park Authority. No formal notification from these bodies has been received, and officers have estimated the levies and assumed no change. The details of these levies are provided in Appendix Y6.

Overall Budget Position for 2023/24

- 6.97. For 2023/24, the overall budget position for the Council is an assumed General Fund Budget Requirement of £263.679m, as set out in Table D6 below:

Table A4 - Overall Budget Position for 2023/24

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Detail	Expenditure/ (Income) £m	Expenditure/ (Income) £m
Settlement Funding Assessment (SFA) for 2023/24	(131.106)	
Council Tax 2023/24 at 4.99% increase	(132.574)	
Assumed Budget Requirement for 2023/24		(263.679)
Base Budget for 2022/23	248.610	
Plus: Additional Pay inflation 2023/24	7.120	
Plus: Unfunded Pay Inflation 2022/23	4.104	
Plus: Non-pay Inflation	5.000	
Plus: Budget pressures to be funded	18.022	
Plus: Energy	3.267	
Plus: Adult Social Care Precept	2.525	
Less: Uplift in Social Care Grant 2022/23*	(1.899)	
Less: Net uplift in Social Care Grant 2023/24*	(8.203)	
Less: Net Market Sustainability and Improvement Fund*	(2.280)	
Less: Budget reductions proposed for 2023/24	(12.587)	
Total		263.679

***Note:** the uplift in Social Care grant and Market Sustainability and Improvement Fund grants will be fully applied to growth and pressures within social care in accordance with the provisional Local Government Finance Settlement but not built into the net base budget requirement.

- 6.98. The statutory calculation for the 2023/24 budget requirement is attached to this report at Appendix Y6.
- 6.99. At this time, on the budget assumptions for the General Fund set out above, no use of reserves is required for 2023/24 to enable the Council to set a balanced budget.

Fees and Charges – 2023/24

- 6.100. Lewisham Council is involved in a wide range of services and the ability to charge for some of these services has always been a key funding source to support the cost of providing the service. The Local Government Act 2000 gave local authorities a wide power to act for the economic, social and environmental well-being of their areas. The general power to charge for discretionary services was included in the Local Government Act 2003.

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- 6.101. The Fees and Charges report aims to ensure a structured, transparent process to review and approve the proposed fees and charges for the coming financial year. The report setting out the fees and charges for 2023/24 and the relevant service commentary are included at Appendix Y8.

Use of Provisions and Reserves

- 6.102. If the need should arise to balance the budget for any in-year pressures using reserves, the Executive Director for Corporate Resources advises that ongoing measures should be identified to rectify this position as quickly as possible and in any event, by the following year. The use of once off resources is therefore just delaying the need to make an equivalent level of saving in the following year.
- 6.103. In addition to the above, as part of the accounts closing process, the ability for the Council to replenish reserves for ongoing work planned for over more than one year and the impact of any risks will be reviewed and assessed and reported on. These risks include:
- Agreed budget reduction proposals experience delays or are not delivered;
 - Service pressures cause overspends;
 - Transformation and change projects overrun;
 - Capital programme overruns hit revenue; and
 - Further savings are not identified, putting strain on future budgets.
- 6.104. Further discussion of the use of reserves and planning for future budgets will be reviewed and brought back for Member consideration as part of the next Medium Term Financial Strategy update in July 2023.

7. Other grants and future years' budget strategy

- 7.1. This section of the report considers the other funding streams which the Council currently receives and implications for future years. The critical point for the budget is that spend of these grants is managed by the Council to ensure commitments are maintained within the resources available. This is to avoid putting pressure on the General Fund.
- 7.2. These other funding streams are Public Health, Better Care Fund, and various other grants. This section of the report is structured as follows:
- New Homes Bonus;
 - Better Care Fund and improved Better Care Fund 2023/24;
 - Discharge Fund;
 - Public Health Grant 2023/24;
 - Social Care Grant;
 - Adult Social Care Precept;
 - Market Sustainability and Improvement Fund;
 - Services Grant;
 - LCTS Administration Support Grant; and
 - UK Shared Prosperity Fund

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New Homes Bonus

- 7.3. The New Homes Bonus (NHB) sits alongside the Council's planning system and is designed to create a fiscal incentive to encourage housing growth. The Ministry of Housing, Communities and Local Government (MHCLG) has been paying the NHB as un-ringfenced grant to enable local authorities to decide how to spend the funding. The scheme design sets some guidance about the priorities that spend should be focused on, in that it is being provided to 'help deliver the vision and objectives of the community and the spatial strategy for the area and in line with local community wishes'.
- 7.4. In the provisional Local Government Finance Settlement statement, the Secretary of State announced that for 2023/24 the NHB would 'roll forward' for one more year but without legacy payments.
- 7.5. The provisional allocation for 2023/24 in Lewisham is £0.114m, this is a significant reduction on the £1.011m received in 2022/23 as a result of the loss of legacy payments. Given the reducing and uncertain nature of this funding the NHB is being treated as one off monies to be used to support energy costs above the growth built into base, not recurring spend.

Better Care Fund and improved Better Care Fund

- 7.6. The national Better Care Fund (BCF) was announced by the Government in the June 2013 Spending Round, to support transformation and integration of health and social care services to ensure local people receive better care. The BCF is a pooled budget paid to the National Health Service (NHS) that shifts resources into social care and community services for the benefit of the NHS and local government. The BCF does not represent an increase in funding but rather a realignment of existing funding streams with new conditions attached.
- 7.7. For Lewisham the value in 2022/23 is £25.972m, increased from the £24.581m in 2021/22, the Council's share of this is £10.730m in 2022/23. The allocation for 2023/24 is expected to be at least the same although local allocations have yet to be confirmed. The local plan must be agreed with the Integrated Care Board (which replaces the Lewisham Clinical Commissioning Group (CCG)), and will require the approval of NHS England.
- 7.8. The Fund must be used in accordance with the final approved plan and through a section 75 pooled fund agreement. The full value of the element of the Fund linked to non-elective admissions reduction target is to be paid over to Lewisham ICB at the start of the financial year. However, the ICB may only release the full value of this funding into the pool if the proposed admissions reduction target is met. If the target is not met, the ICB may only release into the pool a part of that funding proportionate to the partial achievement of the target. Any part of this funding that is not released into the pool due to the target not being met must be dealt with in accordance with NHS England requirements. The partners have agreed contingency arrangements to address this risk and they will continue into 2023/24.
- 7.9. In 2017/18, the government also introduced the improved Better Care Fund (iBCF) to work alongside the BCF. The iBCF in 2022/23 was £14.941m, a small increase from the 2021/22 funding of £14.502m, with the formerly separate winter pressures funding included. This grant has not been increased for 2023/24, this is intended to fund adult social care activity. Plans for its use in 2023/24 will also require the agreement of the local ICB. The grant is likely to be spent in substantially the same way as in 2022/23.

Discharge Fund

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- 7.10. The Provisional Local Government Finance Settlement announced a new grant, the Discharge Fund, ring fenced for ASC and intended to support capacity and discharge. Whilst this is a new grant allocation it is expected as to a like-for-like replacement of existing funding currently made available from the ICB for discharge pressures and is therefore not being allocated in 2023/24 towards new ASC pressures.

Public Health Grant

- 7.11. In 2022/23 the Council's allocation for Public Health Grant is £26.1m, an increase from the 2021/22 allocation of £25.4m. The 2021 Spending Review indicated that this is expected to rise by inflation in 2023/24 but allocations have not yet been published.
- 7.12. The grant remains ring-fenced and the agreed commitment of these funds will therefore need to be reviewed annually by the Director of Public Health in consultation with the section 151 officer.

Social Care Grant

- 7.13. The provisional Local Government finance settlement in December 2022 committed £1,506m more for Social Care grant nationally for 2023/24. This has increased Lewisham's grant from £14.622m in 2022/23 to £23.4m in 2023/24 (a 60% increase) with the discretion to spend this on both adults and children social care. However, the Independent Living Fund of £0.577m has been rolled into the Social Care Grant, meaning that the net increase is £8.2m. The budget proposes that the increase be used in 2023/24 to fund pressures within both Children's and Adults Social Care, including salary and non-salary inflation pressures. The detail is set out in the allocation of resources to pressures in section 6 above.

Social Care Precept

- 7.14. The 2% precept on Council Tax for social care (expected to be £2.525m in 2023/24) will be used to address the increased levels of packages of care required in Adult Social Care as well as the changing and increased complexity of the care needs.

Lower Tier Services Grant

- 7.15. The Lower Tier Services Grant for 2022/23 is £0.802m, however, this has been withdrawn in 2023/24. Given the once off nature of this grant the Council had not used it to fund ongoing services, but rather once off costs and therefore there is no permanent budget pressure arising from its loss.

Market Sustainability and Improvement Fund

- 7.16. In 2021 Government announced wide-ranging and ambitious reform of the adult social care system, intended to protect people from unpredictable costs, offer more choice and control over care received, offers outstanding quality and is accessible to those that need it. This reform must be underpinned by a sustainable care market. To support this ambition and fund the implementation of the reforms government announced an additional £1.4bn of funding over the next three years. For Lewisham in 2022/23 this is a grant allocation of £0.923m. This funding will be ring-fenced for Adult Social Care pressures arising from the implementation of the reforms to support the care market. While the ASC funding reforms have been pushed back to October 2025 (as set out in the Autumn Statement), the existing £162m Market Sustainability and Fair Cost of Care Fund has been combined with the £400m of ringfenced new funding, also set out in the Autumn Statement. Funding will be distributed using the ASC relative needs formula, and for Lewisham this equates to £3.2m of funding, or £2.3m of net new funding. The government expects this new grant funding to enable local authorities to make tangible improvements to adult social care in particular to address discharge delays, social care waiting times, low fee rates and workforce pressures in the adult social care sector. As with the additional iBCF funding, there will be reporting requirements placed on the new Adult Social Care Grant against these objectives.

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Services Grant

- 7.17. The Services grant was introduced in 2022/23 and the Council allocation was £6.6m. The Department of Levelling Up Communities and Housing (DLUCH) explicitly stated that the Services Grant is a once-off funding source and will not be taken into consideration for transitional protection or as part of our core funding when the Fair Funding Review takes place, with likelihood of funding to be directed out of London. As such, this funding was not used to support our baseline funding requirement but instead provided us with once-off capacity to manage the financial risks we were carrying. Whilst there has been a second year allocation of this, it has significantly reduced to £3.7m for 2023/24. Again the Council will not rely on this grant for ongoing budget funding and will utilise it to support energy costs and other once off pressures funding as set out in section 6 above.

LCTS Administration Support Grant

- 7.18. The Council has been in receipt of the LCTS Administration Support Grant for a number of years. The 2022/23 allocation is £0.4m. The provisional Local Government Finance Settlement announced that this grant is being rolled up into the Settlement Funding Assessment, which is not ringfenced. The loss of this specific grant is being treated as a pressure within the 2023/24 budget to ensure that the specific support remains within the services budget.

UK Shared Prosperity Fund

- 7.19. In 2022 the Government launched the UK Shared Prosperity Fund (UKSPF). This provides £2.6billion of funding for local investment across the UK by March 2025. It forms part of the Government's Levelling Up agenda and is intended as the replacement for funding which previously came through the European Union (e.g. European Social Fund). The Government has made an allocation to each local authority area in the UK. In London, the GLA are the lead for UKSPF.
- 7.20. The GLA prepared an Investment Plan for UKSPF in London, in line with the funding priorities set by the Government. This plan was approved by the Government in December 2022. This has allowed the GLA to make allocations of funding to London boroughs. For Lewisham the GLA is proposing to allocate grant funding of £1.92m to be spent by March 2025. This is a mixture of capital (£977k) and revenue (£943k) funding. The funding is allocated to the following activities, in line with the GLA's overall investment plan for London and the investment priorities set by the Government:
- Communities and Place: £977,467 capital and £472,936 revenue – creating or improving commercial workspace; supporting vibrant town centres and high streets; addressing the cost of living; enabling social action and community activation
 - Supporting local businesses: £469,891 revenue – providing outreach, advice and support to local enterprises and potential entrepreneurs
- 7.21. Further UKSPF for the People and Skills investment priority is expected from April 2024. This is being allocated by the GLA to sub-regional partnerships, in Lewisham's case this is Central London Forward. It is anticipated that CLF will allocate a proportion of this funding directly to boroughs. This funding would be used to support local residents in to employment through services such as Lewisham Works.
- 7.22. The GLA will provide a grant funding agreement before the end of the financial year. Approval is sought to accept the funding allocation from the GLA and CLF, subject to review of the grant funding agreements.

8. Dedicated schools grant and pupil premium

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Update on 2022/23 Dedicated Schools Grant

- 8.1. The gross level of the Dedicated Schools' Grant (DSG) for 2022/23 is £319.387m (this includes the supplementary grant of £2.632m), following the adjustment undertaken by the DfE to recoup funding for Academy Schools and the adjustment necessary for the inter-borough use of high needs places, the net budget is £275.063m.
- 8.2. Overall, the 2022/23 DSG outturn is currently expected to be overspent by between £4m to £6m as a consequence of the pressure on the High Needs Block, this increases the cumulative position to circa £16m as £11m cumulative has been brought forward from 2021/22. Officers within the CYP directorate are progressing a detailed mitigation plan, the basis of which will be used to develop a Management Action Plan for submission to the DfE, this is a requirement where an overspend is forecast. The mitigation plan is being progressed in partnership with the Schools Forum, and this includes a working group of Head teacher representatives and Officers. Lewisham will also be working with the DfE as part of the Delivering better value initiative commencing summer 2023, which should further support the local mitigation plan. It should be noted that Lewisham is one of 55 LAs in the delivering better value initiative. LAs with larger deficit are part of more enhanced initiatives including "safety valve".
- 8.3. Whilst the additional funding is welcomed, schools remain concerned that the increases are not sufficient to fund the current cost of living crisis/pressures arising in schools e.g. pay award of 5% in 2022/23 with a further 3% in 2023/24, energy crisis, increase in school meals cost and other contractual commitments, which are currently in line with inflation (i.e. circa 10%). The same applies to budgets managed by the LA, including HNB and CSSB.
- 8.4. The Schools Finance Team (SFT) will continue to work with schools in developing sustainable budget plans. These plans now incorporate management metrics which have been developed to enable schools to be more strategic in their approach to setting and managing budgets. For example, these metrics allow schools to compare and benchmark their resource deployment on leadership, teaching, support administration, and contact time to name a few. In 2020/21, the SFT launched a process known as Deficit Prevention Plans which enable schools to work effectively towards a 3-year balanced budget position, and the feedback from schools has been very positive, this approach continues. We are working effectively with the DfE to support those schools from the DfE funded School Resources Management Advisers Programme (SRMA) initiative. In 2022/23, 6 schools were supported as part of this initiative with a further 5 schools planned over the next 6 months.

Dedicated Schools' Grant and Pupil Premium for 2023/24

- 8.5. This section of the report considers the Dedicated Schools' Grant (DSG) and the Pupil Premium Grant for 2023/24.
- 8.6. The Dedicated Schools Grant is the main source of funding for Schools and Early Year Providers. The grant is constituted of four parts, the Schools Block, Central Services Schools Block (CSSB), High Needs Block (HNB), and the Early Years Block (EYB). There is a national funding formula which determines each of the blocks and collectively determines the overall DSG. The gross allocation of DSG for 2023/24 is £337.776m, this includes the streamlining of the supplementary grant and the teacher's pay and pension grant, resulting in a net increase of circa £20m.
- 8.7. It should be noted that this is the gross DSG allocation before the adjustment undertaken by the DfE to recoup funding for Academy Schools and the adjustment necessary for the inter-borough use of high needs places.

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- 8.8. The Schools Block is the main basis to support the Schools Delegated budget share. There is an overall increase of £11.4m, which includes the streamlining of the supplementary grant (circa £6m).
- 8.9. The High Needs Block, which supports SEND, remains under continued financial strain, despite the net increase in funding of circa £7m. A point to note is that the pupil led funding is based on pupils in special schools and units. As the Council's mitigation strategy progresses towards more in house provision, funding should also improve which is a double benefit as costs would also reduce from in house provision. Lewisham will be part of the DfE delivering better value initiative from 2023/24, which will further support the current mitigation strategy.
- 8.10. The Central School Services Block has again been reduced in 2023/24, with a reduction of £0.4m from 2022/23. There is an expectation that this will continue to reduce year-on-year. This reduces the funding available to support Local Authority Statutory functions. The service is currently working with Schools to consider how the delivery of Statutory and Regulatory services can be met within the reduced funding levels.
- 8.11. Early Years Funding – the funding for this area remains provisional subject to a pupil data cleansing exercise based on January 2023, as such the final budget will not be known until the summer of 2023, which is in line with previous years. The DfE utilised the estimated 2022/23 position data for the indicative settlement. This includes an increase in the hourly rate for 3-4 year olds from £6.04 to £6.33 (4.8%) and for 2 year olds £6.87 to £7.52 (9%). Schools forum at its meeting on 19th January 2023 approved the distribution of the funding between hourly rate paid to providers, inclusion fund, deprivation fund and central holdback, in compliance with the current local determination. The increased funding is mainly targeted to support providers whilst continuing to build on support for an inclusion fund, which plays an important part in the Early Help and prevention strategy.
- 8.12. The pupil premium will continue in the 2023/24 financial year. Funding rates are confirmed to increase by circa 5%, however the school-by-school final allocation will be advised in the summer 2023. For reference the allocation for 2022/23 was £14.7m.
- 8.13. As part of the autumn statement (2022), the DfE has confirmed £7.8m increase for mainstream schools as a specific grant and £3.2m to support the high need block.
- 8.14. Whilst there is extra funding in the settlement, many costs are rising by more than funding, exasperated further where pupil numbers are falling. Schools continue to face pressures in their budgets, for example, salary increments – circa 8% over two years, non-teaching pay increase – circa 10%, contract price increases including utilities, school meals etc at inflationary or above levels.
- 8.15. Table B1 below sets out the gross DSG provisional allocation (incorporating streamlined grant and additional funding from the autumn statement)

Table B1: DSG Allocation

	Schools block (£m)	Central school services block (£m)	High needs block (£m)	Early years block (£m)	Total DSG allocation (£m)
	A	B	C	D	E=A+B+C+D
2023/24	238.630	3.309	77.155	26.283	345.376

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2022/23	227.257	3.693	70.124	24.501	325.576
Movement	11.372	-0.385	7.031	1.782	19.800

*to facilitate a like-for-like comparison, the effect of the supplementary grant, teacher's pay and pension grant and the additional funding from the autumn statement have all been factored in the table above.

Pupil Numbers

- 8.16. The total changes in pupil numbers are as shown in table B2 below. Overall, there is a net reduction in numbers of 227, which, whilst relatively small at present, is the fifth consecutive year of fall and a risk for the schools concerned as funding for schools is driven by pupil numbers and associated characteristics (e.g. Free School Meals). This reduction in numbers could potentially have implications for those schools directly affected.
- 8.17. The primary numbers are continuing to decrease year-on-year with the secondary schools now benefitting from the previous primary school bulge classes/expansions now feeding into the secondary schools. Also, more secondary school aged children choosing to stay in Lewisham secondary schools.

Table B2: Pupil Numbers

	Oct-22	Oct-21	Change No	Change %
Primary	22,551.50	23,003.00	-451	-1.961%
Secondary	11,627.50	11,403.50	224	1.964%
Net	34,179.00	34,406.50	-227	-0.659%

High Needs Block

- 8.18. The 2023/24 allocation for Lewisham is an overall net increase of £7m, which against the 2022/23 allocation of £70.124m is a 10% increase, £500k of this increase relates to increase in pupil numbers in special schools settings.
- 8.19. It is expected that the High Needs Block will overspend for 2022/23 by up to £6m which will be the first call on this budget. In addition to this there remains a £11m overspend brought forward from 2021/22, providing a revised cumulative overspend position of circa £16m. There is a mitigation plan in place that is being progressed with Schools Forum. This will be further supported by the delivering better value DfE sponsored initiative.

Potential Risks

- 8.1. As set out in this section, there remain a number of risks in respect of funding for schools. These include:
 - Impact of any overspends and the resultant requirement to establish a deficit recovery plan if the overspend is greater than 1%. In the event that the deficit cannot be contained, this pressure could potentially fall on the Schools Block, or potentially the General Fund triggering a review of services within CYP;

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- In 2019, the DfE introduced changes which now mean that where schools have deficits, these must be held against the overall schools reserves not exceeding 40%. However, if, on conversion to an academy, a school has a deficit this must be supported by the local authority;
- Schools continue to face pressures arising from changes in policy. Examples include teachers' pay awards, support staff pay award, and pension's changes. This could have varying degree of impact for Schools;
- Budget plans from Schools suggest that some are operating with a structural deficit dependent on reserves. Schools Finance are working with these schools to mitigate this risk;
- The rising costs of utilities and other pressures, e.g. increase in contracts such as school meals has not been recognised in the funding allocations, and schools may struggle to meet these costs over the coming year; and
- The forecast level of inflation may mean that contract uplifts and potential pay awards will continue to outstrip the increases in the funding allocations.
- Cost of living crisis for individuals may potentially mean that more children need additional support.

9. Housing Revenue Account (HRA)

- 9.1. The budgeted expenditure for the HRA in 2023/24 is £257.1m, including the capital and full new build programme.
- 9.2. It is structured as follows:
- Update on the HRA financial position for 2022/23;
 - Update on the HRA Business Plan; and
 - Future Years' Forecast.

Update on the HRA financial position for 2022/23

- 9.3. The HRA is budgeted to spend over £100m in 2022/23. The latest forecast on the HRA for 2022/23, is that net expenditure can be contained within budget by the year end. There are currently reported pressures in both income and expenditure which can, if necessary, be mitigated by the use of once-off contingencies, reserves and revenue working balances. Expenditure against repairs & maintenance budgets is expected to be contained within the sums allocated.

Update on the HRA Business Plan

- 9.4. The Housing self-financing system was implemented on 1 April 2012 when the HRA subsidy scheme was abolished. The 30 year financial model has been developed based on current management arrangements and rental income estimates, updated for efficiencies and cost pressures. In addition, policy objectives such as decent homes, sheltered housing and new build plans are incorporated into the modelling.
- 9.5. The plan underwent a major revision in 2015 for a 1% reduction in social rents applied each year for four years from 2016/17 to 2019/20. The impact of the change was a loss of actual rental income of £2.8m when measured against the actual rent roll for the 4 financial years. A loss of £25m against the budgeted resources for the same period and an overall loss of resources assessed at £374.0m over the life of the 30 year business plan.

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- 9.6. Subsequently, from April 2020 government lifted the rent reduction policy and allowed councils with social housing stock to return to the previous method of rent increase calculations to at least 2025. This method of rent increase is based on CPI + 1%, which was the Government's policy for rent increases. This method had been implemented in Lewisham and became effective for rental increases applied from April 2020 onwards.
- 9.7. However, due to the current cost of living crises and current high inflation which would impact on rent increases, Government issued a consultation in September 2022 seeking opinion from Local Authorities on capping rent increases for 2023/24 to 3%, 5% or 7%, or to allow increases to follow the policy guidance of CPI + 1%. Any capping of increases would result in a loss to the HRA. The consultation closed on 12th October 2022.
- 9.8. The council responded to the consultation and agreed that, like local authorities across London and the country, we were very concerned about the impact of the cost of living crisis on residents and that we are doing everything we can to support residents, target help at those who need it most and that it is right that something is done to protect social housing tenants.
- 9.9. However, we face significant challenges in doing so and that without further support from Government to mitigate the funding gap, the imposition of a rent cap will severely impact on our ability to maintain decent homes, maintain and invest in our existing stock, meet building safety and new regulatory requirements and continue building new social homes.
- 9.10. It was imperative that the Government recognise the financial pressures on Councils and provide us with additional funding. Significant financial pressures are already bearing down on local authority HRAs. Primarily these pressures have been driven by the previous policy to reduce social housing rents by 1% for four years from 2016/17 but have also been compounded by the impacts of the COVID-19 pandemic, rising inflation impacting on the HRA cost-base and increasing demands on funding as noted above whilst continuing to achieve a balanced HRA.
- 9.11. While it is essential that rents increases are kept as low as possible, any cap in rent increases should be accompanied by additional funding from the Government, via a grant of some kind or through re-opening of the HRA self-financing settlement, in order to allow housing providers to continue to invest in their stock and meet their obligations.
- 9.12. The government's response to the consultation was to confirm and issue a notice to the regulator of social housing to cap rent increase to a maximum of 7%, without additional funding to housing providers.
- 9.13. We therefore propose to increase rents by an average 7% for 2023/24. We would have liked to have been able to propose a lower increase but, without additional funding from Government, this would have resulted in unsustainable pressures on the HRA and left us unable to carry out essential works to buildings. This results in an average increase of £7.22pw over a 52 week period. This will increase the full year average dwelling rent for the London Borough of Lewisham HRA stock (as at April 2022) from £103.25pw to £110.47pw.
- 9.14. The HRA financial model has therefore been updated with current government directions to cap rental increases to a maximum of 7% for financial year 2023/23, rather than using the standard formula rent calculation which would have resulted in a rental increase of 11.1%. The capped rental increase has resulted in a loss of resources to the HRA account of £3.0m for 2023/24 and £160m for the 30 year life of

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the business plan when compared to rental increases based on CPI + 1%. Long term rental forecasts are based on the assumption of rent increases based on CPI + 0.5%.

- 9.15. Following Grenfell, our top priority is to make our blocks safe; we also want to get of all of homes to decent homes standard and, particularly following the tragic case of Awaab Ishaak, make all homes safe from damp and mould. Given the age of much of our stock, these works are costly and will severely impact the HRA. The lack of funding from the government means we are increasingly having to choose which of these crucial works to prioritise.
- 9.16. There is a further complication in that due to recent legislative changes, leaseholders cannot be recharged for some of the fire remediation works leading to further income losses.
- 9.17. Sustainability and carbon reduction ambitions, as well as improving thermal comfort for our tenants is another pressure on the HRA.
- 9.18. The Government's inflation target for the United Kingdom is defined in terms of the Consumer Price Index (CPI) measure of inflation. Since April 2011, the CPI has also been used for the indexation of benefits, tax credits, and public service pensions.
- 9.19. For financial planning purposes, the HRA is assuming average pay inflation, for the longer term of 2% per annum, based on the Governments CPI Inflation target. Non-pay inflation is also based on the Governments CPI inflation target of 2.0% per annum. In the short term, pay inflation is estimated at 6% for 2023/24 and 4% for 2024/25. Non-pay inflation such as R&M, materials and contract costs are forecast at 10.1% for 2023/24 and 6% for 2024/25.
- 9.20. In order to protect the business plan and provide the same level of investment and services, any reduction in income will need to be off-set through increased efficiencies and reprioritisation of investment requirements across stock condition and/or development plans.
- 9.21. A review of current investment needs and priorities has been undertaken, based on updated surveys and inflation estimates. This includes assumptions on future liabilities, such as maintaining decent homes, fire programme, sustainability, planned works and improvements, cuts, and other requirements. These assumptions have been used to inform the resource need and identify potential gaps in funding and opportunities for additional income and grants. Work is continually ongoing to identify and update investment needs. As this work is completed and updated information becomes available, which includes the results of the damp and disrepair MOTs, the resource needs will be updated which may affect future requirements.
- 9.22. The plan also contains costs associated with the new build programme currently being implemented by the authority. Table C1 provides an illustration of the expected HRA budget for the next five years, which includes the current 7.0% capped rent increase estimates for 2023/24. The HRA debt cap which was imposed when the self-financing regime was implemented (£127.3m) has now been abolished. The HRA will now be subject to prudential borrowing rules (as per the General Fund).

Table C1: Update on the HRA Business Plan

HRA Income & Expenditure Estimates - 5 year Forecast	2023/24	2024/25	2025/26	2026/27	2027/28
	£m	£m	£m	£m	£m
Income					

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Rental income	(81.4)	(88.1)	(93.5)	(97.3)	(98.9)
Tenants service charge income	(7.0)	(7.5)	(7.6)	(7.7)	(7.7)
Leasehold service charge income	(6.2)	(6.6)	(6.7)	(6.8)	(7.0)
Hostel charges and grant income	(1.5)	(1.5)	(1.5)	(1.6)	(1.6)
Major Works recoveries	(6.2)	(6.3)	(6.4)	(6.5)	(6.7)
Other income	(1.8)	(1.8)	(1.8)	(1.8)	(1.8)
Interest earned on balances	(0.2)	(0.2)	(0.2)	(0.2)	(0.2)
Total Income	(104.3)	(112.0)	(117.7)	(121.9)	(123.9)
Expenditure					
Management costs	45.7	49.0	47.7	49.2	51.9
Repairs & maintenance	17.1	18.0	18.3	18.5	19.7
PFI Costs	8.2	8.8	9.0	9.2	2.0
Interest & other finance costs	5.6	10.0	14.2	16.1	17.0
Depreciation	26.3	26.8	27.2	27.7	28.2
Revenue Contribution to Capital	0.7	0.0	0.8	0.7	5.0
Total Expenditure	103.6	112.6	117.2	121.4	123.8
Surplus/(deficit)	0.7	(0.6)	0.5	0.5	0.1
Opening HRA reserves	8.4	9.1	8.5	9.0	9.5
Contribution to/(Drawdown) from reserves	0.9	(0.6)	0.5	0.4	0.1
Closing HRA Reserves	9.1	8.5	9.0	9.5	9.6
Forecast Capital Programme & Funding					
Capital programme (including decent Homes)	69.5	70.9	72.3	57.8	55.1
New Build construction & on-going costs	84.0	121.3	74.2	16.5	19.6
Total Capital Expenditure	153.5	192.2	146.5	74.3	74.7
Capital Programme Funded By:					
MRR Opening Balance	0.0	0.0	0.0	0.0	0.0
Revenue Contribution to Capital	(0.7)	0.0	(0.8)	(0.7)	(5.0)
Depreciation	(26.3)	(26.8)	(27.2)	(27.7)	(28.2)
GLA Grants	(12.3)	(13.3)	(10.0)	(12.4)	0.0
RTB Receipts	(15.5)	(26.0)	(12.9)	(2.1)	(1.0)
Sale Receipts	(1.9)	(1.8)	(7.3)	(21.4)	(2.3)
Other Receipts	0.0	0.0	0.0	0.0	0.0
Borrowing	(96.8)	(192.2)	(88.3)	(10.0)	(38.2)
Total Capital Funding	(153.5)	(188.4)	(146.5)	(74.3)	(74.7)
Capital shortfall	0.0	0.0	0.0	0.0	0.0
HRA Actual Debt Level (Forecast)	186.8	309.9	396.9	406.8	443.9

Note: The New Build construction costs includes all approved schemes and unapproved pipeline schemes within the programme and may change as scheme assessments progress.

- 9.23. As can be seen from the above table, the expected total expenditure, before financing, for the HRA in 2023/24 is £257.1m, comprising £103.6m operational costs and £153.5m capital and full new build costs.

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- 9.24. The HRA capital forecasts in the table above differ from the figures presented in section 11 (Table E3). This is because the overall capital programme in section 11 only includes schemes that have been approved by Mayor & Cabinet, whereas the HRA forecast business plan includes both approved schemes and unapproved pipeline schemes.
- 9.25. The current HRA budget allocations do not yet take account of the in-sourcing of the authorities ALMO, as agreed by Mayor & Cabinet in their meeting of 9th December 2022.
- 9.26. Plans are currently being drawn-up to facilitate the insourcing of the ALMO including the appropriate timing of the change and once-off costs and savings that may be achieved. A further update will be provided to Mayor & Cabinet once plans are sufficiently progressed.

Future Years' Forecast

- 9.27. The key purpose of the proposed HRA budget is to ensure that there are sufficient resources to support lifecycle works, such as; repairs and maintenance, the Decent Homes programme and, a key priority for the current administration, delivery of new social homes in the borough.
- 9.28. There is an ongoing process to identify opportunities for efficiencies to deliver services for improved value for money and this is described in Appendix 1. Although no direct savings have been identified so far for 2023/24, any savings and efficiencies delivered against the HRA business model and future budgets can be re-invested to off-set constrained rent rises or to help bridge any investment gap identified. Discussions are ongoing to identify appropriate savings. For example, there is already an assumed reduction in the Lewisham Homes fee in 2023/24 to reflect stock losses through Right to Buy Sales.
- 9.29. Separate reports which set out in detail the proposals relating to service charges for Brockley and Lewisham Homes residents are attached at Appendix X3 and Appendix X4, respectively.

Rental Income and allowances

- 9.30. Following completion of the legislative requirements for 4 years of rental contraction, Government confirmed rents would return to the previous method of rent increase calculations for 2020/21 onwards. This was based on the previous formula rent calculation of CPI + 1%, and would be for a minimum 5 year period to financial year 2025/26. For the purpose of business and financial planning, it was assumed that that rental charges will be increased in line with this guidance.
- 9.31. In line with the formula rent calculation policy, rents would have been expected to rise by 11.1% based on CPI of 10.1% (as at September 2022) + 1% for 2023/24 and CPI + 1% up until 2025.
- 9.32. An 11.1% increase in average rents for HRA dwelling stock 2023/24 would have equated to an average increase of £11.45pw over a 52 week period. This would have increased the full year average dwelling rent for the London Borough of Lewisham from £103.25pw to £110.47pw. The proposed increase would have resulted in additional income of £8.185m for the HRA against 2022/23 income levels.

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- 9.33. However, due to the current cost of living crises and current high inflation which would impact on rent increases, Government issued a consultation seeking opinion from Local Authorities on capping rent increases for 2023/24 to 3%, 5% or 7%, or to allow increases to follow the policy guidance of CPI + 1%. The capping of increases could take affect for either 1 or 2 years. At the time, Government stated that their preferred preference was for an increase capped at 5%.
- 9.34. Following the autumn statement on 17th November 2022, Government confirmed that rents would be capped at a maximum increase of 7% for financial year 2023/24. Given the lack of additional funding by the Government, we are therefore proposing to increase by an average 7% for 2023/24. This results in an average increase of £7.22pw over a 52 week period. This will increase the full year average dwelling rent for the London Borough of Lewisham HRA stock (as at April 2022) from £103.25pw to £110.47pw.
- 9.35. Whilst it is right that rents are kept lower for tenants in these difficult times, without support from the government, lower rents will impact on our ability to invest further in the stock. A capped 7% increase in rents will raise an additional £5.162m, but will be some £3.0m lower than an increase based on CPI + 1% and result in a total of £160.0m of lost resources over the 30 year period of the HRA business plan, which isn't compensated for by the Government.
- 9.36. It should be noted that the HRA cost base for management and maintenance, materials and capital investment will be inflated based on inflation increases similar to or based on the CPI/RPI output data. In addition, debt interest charges will also increase based on the need to borrow for HRA investment needs and increase in interest rates applied to debt.
- 9.37. At the present time, for financial planning purposes, the financial models used by the council currently forecast future CPI to be 2.0% annually for the period beyond 2025 and would equate to an annual average increase of 2.5% to be applied to rents. It should be noted that any variation to the forecast CPI rate of 2% would affect the annual average forecasts stated above. The financial model for the HRA is assuming average pay inflation, for the longer term of 2% per annum, based on the Governments CPI Inflation target. Non-pay inflation is also based on the Governments CPI inflation target of 2.0% per annum. In the short term, pay inflation is estimated at 6% for 2023/24 and 4% for 2024/25. Non-pay inflation such as R&M, materials and contract costs are forecast at 10.1% for 2023/24 and 6% for 2024/25.
- 9.38. A rent rise higher than the rent limit calculation, set by Government, will result in additional recharges to the HRA via the Housing Benefit (HB) subsidy limitation charges. Any rise above this level will be lost through additional limitation recharges and therefore result in no benefit to the HRA.
- 9.39. Tenants were asked to provide comments and feedback on the proposed rent changes and illustration for inclusion in the Mayor and Cabinet budget report at meetings held with Brockley PFI and Lewisham Homes tenants. Full details of residents' feedback, additional comments received, minutes of meetings and the response to the additional comments received are contained in Appendix X2.
- 9.40. The main comments received from Lewisham Homes' residents concerning the proposals for rents and garages was that there are issues of affordability given the current cost of living crises and increase in unemployment. The main comments regarding service charges were questioning value for money as charges are increasing but service delivery is not improving.

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- 9.41. Comments received from the RB3 Brockley residents were in a similar vein to the Lewisham Homes residents comments regarding affordability and value for money concerning the proposals for rents, garages and service charges.
- 9.42. Details of the options for the rent and service charge changes for 2023/24 were presented to the Housing Select Committee on 5th January 2023. The committee noted the contents of the report.
- 9.43. Having regard to the outcomes of the consultations held in December 2022 as set out above (and with more detail in Appendices X2, X3, and X4), the Mayor is asked to make a recommendation to full Council that a 7.0% rent increase be agreed as per the Governments capped increases for 2023/24. The new average rent for 2023/24 is likely to be in the region of £110.47pw, an increase of approximately £7.22pw from 2022/23 levels.

Other Associated Charges

- 9.44. There are a range of other associated charges. These include: garage rents, tenants levy, hostels, Linkline, private sector leasing, heating and hot water. These charges and any proposed changes to them for 2023/24 are set out in detail in Appendix X5 and Appendix X6.

Summary

- 9.45. The gross budgeted expenditure for the HRA in 2023/24 is £257.1m, £103.6m revenue and £153.5m capital. Mayor and Cabinet is asked to recommend that Council approve a rent increase of 7.0% having considered tenant's feedback following consultation held in December 2022. The current average weekly rent is £103.25 in 2022/23. This will increase to £110.47pw in 2023/24.

10. Treasury Management Strategy

- 10.1. The Council is required to operate a balanced budget, which broadly means that cash raised during the year will meet cash expenditure. Part of the treasury management operation is to ensure that this cash flow is adequately planned, with cash being available when it is needed. Surplus monies are invested in low risk counterparties or instruments commensurate, with the Council's low risk appetite, providing adequate liquidity initially before considering investment return.
- 10.2. The second main function of the treasury management service is the funding of the Council's capital plans. These capital plans provide a guide to the borrowing need of the Council, essentially the longer-term cash flow planning, to ensure that the Council can meet its capital spending obligations. This management of longer-term cash may involve arranging long or short-term loans or using longer-term cash flow surpluses. On occasion, when it is prudent and economic, any debt previously drawn may be restructured to meet Council risk or cost objectives.
- 10.3. The contribution the treasury management function makes to the authority is critical, as the balance of debt and investment operations ensure liquidity and the ability to meet spending commitments as they fall due, either for day-to-day revenue purposes or for larger capital projects. Treasury operations will see a balance of the interest costs of debt and the investment income arising from cash deposits affecting the available budget. Since cash balances generally result from reserves and balances, it is

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paramount to ensure adequate security of the sums invested, as a loss of principal will in effect result in a loss to the General Fund.

- 10.4. Whilst any commercial initiatives or loans to third parties will impact on the treasury function, these activities are generally classed as non-treasury activities, arising usually from capital expenditure, and are separate from the day to day treasury management activities.
- 10.5. Accordingly, treasury management is defined as “the management of the local authority’s borrowing, investments and cash flows, its banking, money market and capital market transactions; the effective control of the risks associated with those activities; and the pursuit of optimum performance consistent with those risks.”
- 10.6. The Council complies with the requirements of the Chartered Institute of Public Finance and Accountancy’s (CIPFA) Code of Practice on Treasury Management which was revised in December 2021 with the new requirements taking affect this year, more information is set out in Appendix Z7. The primary requirements of the CIPFA Code are as follows:
 - a) Maintenance of a Treasury Management Strategy Statement (TMSS) which sets out the policies and objectives of the Council’s treasury management activities;
 - b) Maintenance of Treasury Management Practices (TMP) which set out the manner in which the Council will seek to achieve those policies and objectives;
 - c) Receipt by the full Council of an annual Treasury Management Strategy Statement - including the Annual Investment Strategy and Minimum Revenue Provision Policy - for the year ahead. During the year there will be a Mid-year Review Report and an Annual Report covering activities during the previous year;
 - d) Delegation by the Council of responsibilities for implementing and monitoring treasury management policies and practices and for the execution and administration of treasury management decisions;
 - e) Delegation by the Council of the role of scrutiny of treasury management strategy and policies to a specific named body. For this Council the delegated body is the Public Accounts Select Committee;
 - f) The CIPFA 2021 Prudential and Treasury Management Codes require all local authorities to prepare a Capital Strategy report (this is a separate report) which will provide the following:
 - a high-level long-term overview of how capital expenditure, capital financing and treasury management activity contribute to the provision of services
 - an overview of how the associated risk is managed
 - the implications for future financial sustainability
 - g) The aim of the Capital Strategy is to ensure that all the Council’s elected members fully understand the overall long-term policy objectives and resulting Capital Strategy requirements, governance procedures and risk appetite.
- 10.7. Additionally, this report sets out the current economic conditions in which the Council is operating in respect of its investments and borrowing. It details the Council’s treasury performance (focused on security, liquidity and return in that order) and forecast capital position and provides updates on performance against the current Treasury Management Strategy as required by the Chartered Institute of Public Finance and Accountancy (CIPFA) Code of Practice.

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- 10.8. Whilst any commercial initiatives or loans to third parties will impact on the treasury function, these activities are generally classed as non-treasury activities, (arising usually from capital expenditure), and are separate from the day-to-day treasury management activities.

Capital Investment Plans

- 10.9. The Treasury Management Strategy for 2023/24 incorporates the capital plans of the Council, which are a key driver of treasury management activity. The output of capital expenditure plans is reflected in the prudential indicators, which are designed to assist Members' overview and confirm capital expenditure plans.
- 10.10. The treasury management function ensures that the Council's cash is organised in accordance with the relevant professional codes so that sufficient cash is available to meet service activity and the Council's Capital Strategy. This involves both the management and monitoring of cash flows and, where capital plans require, the arrangement of appropriate borrowing facilities.

Capital Strategy

- 10.11. The CIPFA 2021 Prudential and Treasury Management Codes require all local authorities to produce a Capital Strategy, which will provide the following:
- A high-level long-term overview of how capital expenditure, capital financing and treasury management activity contribute to the provision of services;
 - An overview of how the associated risk is managed; and
 - The implications for future financial sustainability.
- 10.12. The aim of the strategy is to ensure that all elected Members on full Council fully understand the overall long-term policy objectives and resulting Capital Strategy requirements, governance procedures and risk appetite.
- 10.13. The Capital Strategy is reported separately from the Treasury Management Strategy; non-treasury investments will be reported through the former. This ensures the separation of the core treasury function under security, liquidity and yield principles, and the policy and commercialism investments usually driven by expenditure on an asset. The Capital Strategy shows:
- The corporate governance arrangements for these types of activities;
 - Any service objectives relating to the investments;
 - The expected income, costs and resulting contribution;
 - The debt related to the activity and the associated interest costs;
 - For non-loan type investments, the cost against the current market value; and
 - The risks associated with each activity.

Capital Position (Prudential Indicators)

- 10.14. Forward projections for borrowing as at 31 March 2023 are summarised below in Table D1, which shows the actual external debt from treasury management operations and other long-term liabilities against the underlying capital borrowing need (the Capital Financing Requirement - CFR) which is simply the total historic outstanding capital expenditure which has not yet been paid for from either revenue or capital resources. It is essentially a measure of the Council's indebtedness, and its underlying borrowing requirements.

Capital Expenditure and Financing

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10.15. This prudential indicator is a summary of the Council's capital expenditure plans, both those agreed previously, and those forming part of this budget cycle. Members are asked to approve the capital expenditure forecasts:

Table D1: Capital Expenditure forecast

Capital expenditure Forecast	2022/23 Forecast	2023/24 Estimate	2024/25 Estimate	2025/26 Estimate
	£m	£m	£m	£m
Non-HRA	45.0	51.4	16.6	14.4
HRA	140.1	142.0	149.5	91.0
Total	185.1	193.4	166.1	105.4

10.16. The table below summarises the above capital expenditure plans and how these plans are being financed by capital or revenue resources. Any shortfall of resources results in a funding borrowing need.

Table D2: Capital financing forecast

Capital financing forecast	2022/23 Forecast	2023/24 Estimate	2024/25 Estimate	2025/26 Estimate
	£m	£m	£m	£m
Grants	12.6	13.1	7.3	3.4
S106 & CIL	5.7	6.6	4.2	0
Capital Reserves	10.5	5.3	0.5	0.3
Corporate Reserves	4.3	3.2	0.3	0
Capital Receipts	4.5	1.1	3.2	10.1
Prudential Borrowing	7.4	20.1	1.1	0.6
General Fund	45.0	51.4	16.6	14.4
Grants	32.9	25.3	29.1	12.1
S106 & CIL	0	0	0.2	0.4
Capital Reserves & Revenue Contribution	50.7	27.0	26.8	28.1
Capital Receipts	20.4	1.7	1.3	3.9
Prudential Borrowing	36.1	88.0	92.1	46.6
HRA	140.1	142.0	149.5	91.0
Total	185.1	193.4	166.1	105.4

10.17. The Council's Borrowing Need or CFR (Capital Financing Requirement) is shown below:

Table D3: External Debt Projections

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	2021/22 Actual £m	2022/23 Forecast £m	2023/24 Forecast £m	2024/25 Forecast £m	2025/26 Forecast £m
External Debt at 1 April	224.9	216.7	254.5	353.8	434.9
Expected change in External Debt	(8.2)	37.8	98.7	80.8	34.0
Other Long-Term Liabilities	203.4	209.8	198.4	186.1	172.2
Gross Debt at 31 March	420.0	464.3	551.6	621.7	641.2
CFR - HRA	55.5	91.6	176.9	262.7	303.1
CFR – General Fund and Other Long-Term Liabilities	451.7	454.5	469.7	465.7	461.5
Total Capital Financing Requirement at 31 March*	505.1	546.1	646.6	728.5	764.6
Borrowing – over / (under)	(85.1)	(81.8)	(94.4)	(107.8)	(122.9)

*The Capital Financing Requirement includes the prudential borrowing figures shown in the 2023/24 Capital Strategy. There is a risk given the scale and ambition of the capital programme, particularly in the HRA. We will ensure that we only borrow as the need arises.

- 10.18. Within the prudential indicators, there are a number of key indicators to ensure that the Council operates its activities within well-defined limits. The CFR is simply the total historic outstanding capital expenditure which has not yet been paid for from either revenue or capital resources. It is essentially a measure of the Council's indebtedness and so its underlying borrowing need. Any capital expenditure above, which has not immediately been paid for through a revenue or capital resource, will increase the CFR.
- 10.19. The CFR does not increase indefinitely, as the minimum revenue provision (MRP) is a statutory annual revenue charge which broadly reduces the indebtedness in line with each asset's life, and so charges the economic consumption of capital assets as they are used.
- 10.20. The CFR includes any other long-term liabilities (e.g., PFI schemes, finance leases). Whilst these increase the CFR, and therefore the Council's borrowing requirement, these types of schemes include a borrowing facility by the PFI, PPP lease provider and so the Authority is not required to separately borrow for these schemes.

Limits to Borrowing Activity

- 10.21. There are two measures of limiting external debt; the 'operational boundary' and 'authorised limit for external debt', which the Council reports on as part of its prudential indicators. Both are described in further detail in the following paragraphs.

The Operational Boundary for External Debt

- 10.22. This is the limit beyond which external debt is not normally expected to exceed. In most cases, this would be a similar figure to the CFR, but may be lower or higher depending

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on the levels of actual debt and the ability to fund under-borrowing by other cash resources. The Council's operational boundary is set out in Table D3.

Table D3: Operational Boundary

	2022/23 £m	2023/24 £m	2024/25 £m	2025/26 £m
Maximum External Debt at 31 March	254.5	353.2	434.9	69.0
Other Long-Term Liabilities	209.8	198.4	186.1	172.2
Provision for Non Receipt of Expected Income	56.0	56.0	56.0	56.0
Operational Boundary for Year	520.3	607.6	677.0	697.2

The Authorised Limit for External Debt

- 10.23. This key indicator represents a control on the maximum level of borrowing, and provides a limit beyond which external debt is prohibited. It reflects the level of external debt which, while not desired, could be afforded in the short term but is not sustainable in the longer term.
- 10.24. This is a statutory limit determined under Section 3(1) of the Local Government Act 2003 and needs to be set and revised by full Council. The Government retains an option to control either the total of all Councils' plans, or those of a specific Council, although this power has not yet been exercised.
- 10.25. The authorised limits are as set out in Table D4.

Table S4: Authorised Limits for External Debt

	2022/23 £m	2023/24 £m	2024/25 £m	2025/26 £m
Operational Boundary for Year	520.3	607.6	677.0	697.2
Additional 10% Margin	52.0	60.8	67.7	69.7
Authorised Limit for Year	572.3	668.4	744.7	766.9

Liability Benchmark

- 10.26. A new prudential indicator for 2023/24 is the Liability Benchmark (LB). The Council is required to estimate and measure the LB for the forthcoming financial year and the following two financial years, as a minimum.
- 10.27. There are four components to the LB: -
1. Existing loan debt outstanding: the Council's existing loans that are still outstanding in future years.
 2. Loans CFR: this is calculated in accordance with the loans CFR definition in the Prudential Code and projected into the future based on approved prudential borrowing and planned MRP.
 3. Net loans requirement: this will show the Council's gross loan debt at the last financial year-end, projected into the future and based on its approved prudential borrowing, planned MRP and any other major cash flows forecast.
 4. Liability benchmark (or gross loans requirement): this equals net loans requirement plus short-term liquidity allowance.

Table D5: Liability Benchmark

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London Borough of Lewisham Liability Benchmark		2022/23	2023/24	2024/25	2025/26
		£m	£m	£m	£m
Capital Financing Requirement (CFR)					
General Fund	454.5	469.7	465.7	461.5	
Housing Revenue Account (HRA)	91.6	176.9	262.7	303.1	
Capital Financing Requirement	546.1	646.6	728.4	764.6	
PFI Liabilities	(193.2)	(182.4)	(170.7)	(157.3)	
Finance Lease Liabilities	(16.6)	(16.0)	(15.5)	(14.9)	
Underlying Borrowing Requirement	336.3	448.1	542.3	592.4	
External Borrowing	(216.7)	(254.5)	(353.8)	(434.6)	
Loan Repayments	1.1	1.1	1.1	1.1	
External Borrowing	(38.9)	(100.4)	(81.9)	(36.2)	
Under / (Over) Borrowing	(254.5)	(353.8)	(434.6)	(469.6)	
<i>Underborrowing as a % of Underlying Borrowing Requirement</i>	<i>81.8</i>	<i>94.9</i>	<i>107.8</i>	<i>122.9</i>	

Minimum Revenue Provision (MRP) Policy

- 10.28. The Council is required to pay off an element of the accumulated General Fund capital spend each year (the CFR) through a revenue charge (the MRP), although it is also allowed to undertake additional voluntary payments if required (Voluntary Revenue Provision – VRP). The MRP must be determined by the Council as being a prudent provision having regard to the DLUHC (Department for Levelling Up, Housing and Communities) (previously MHCLG) Statutory Guidance on Minimum Revenue Provision.
- 10.29. The MRP is the amount the Council charges to the revenue account and does not correspond to the actual amount of debt repaid, which is determined by treasury related issues. Historically the Council has applied a consistent MRP policy which comprises prudential borrowing being repaid over the useful life of the asset concerned and previous borrowing being repaid at the rate of 4% (equivalent to 25 years) of the outstanding balance.
- 10.30. In 2016/17, this policy was changed to reflect the useful lives of the specific asset classes on the Council's balance sheet. It moved to:
- A straight line MRP of 14% equivalent to seven years for plant and equipment (such as IT and vehicles); and
 - A straight line MRP of 2.5% equivalent to forty years for property (such as land and buildings).
- 10.31. In 2017/18, a third element was added to the Council's MRP policy, whereby no MRP need be charged on capital expenditure where the Council has assessed that sufficient collateral is held at a current valuation to meet the outstanding CFR liability, and that should it be determined at any point that insufficient collateral is held to match the Council's CFR liability, a prudent MRP charge will commence.
- 10.32. In 2019/20 the Council commissioned an independent review of its current MRP policy to ensure it is fit for current and future spending plans, as well as a review of historic calculations and a reconciliation to the CFR to identify any potential efficiencies. The review was undertaken by the Council's treasury advisors, Link Group.

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- 10.33. The Council implemented one of the recommendations from the report from 2019/20 onwards, specifically to adjust for an historic overcharging of MRP from 2003/04 as a result of a miscalculation in the 'Adjustment A' figure (an accounting adjustment designed to ensure minimal changes in liability when new capital financing regulations were introduced in 2003/04). The Prudential Code allows for MRP to be reduced appropriately, in line with an authority's own judgement, where Adjustment A reflects an error that increases the current MRP liability. As such, the Council reduced its ongoing liability by reducing its MRP charge to account for the higher Adjustment A figure, whilst additionally offsetting current and future years' MRP charges to recover the historic overcharging since 2003/04.
- 10.34. Under the MRP guidance, any charges made in excess of the statutory MRP can be made, known as voluntary revenue provision (VRP). The value of the overcharge has been Cumulative VRP overpayments made as at 31 March 2022 is £7.1m.
- 10.35. There is no requirement on the HRA to make a minimum revenue provision but there is a requirement for a charge for depreciation to be made.
- 10.36. Capital expenditure incurred during the year will not be subject to an MRP charge until the following year, or in the year after the asset becomes operational.
- 10.37. MRP in respect of assets acquired under Finance Leases or PFI will be charged at an amount equal to the principal element of the annual repayment.
- 10.38. For capital expenditure on loans to third parties where the principal element of the loan is being repaid in annual instalments, the capital receipts arising from the principal loan repayments will be used to reduce the CFR instead of MRP.

Borrowing, Treasury Indicators and Debt Rescheduling Borrowing Strategy

- 10.39. The Council's external debt as at 31 March 2023, gross borrowing plus long term liabilities, is expected to be £464.34m. The Council's borrowing strategy is consistent with last year's strategy. The Council is currently maintaining an under-borrowed position in that the CFR is not fully funded with loan debt, as cash supporting the Council's reserves, balances and cash flow has been used as an alternative funding measure. In the current economic climate, this strategy is considered prudent while investment returns are low and counterparty risk remains an issue to be considered.
- 10.40. The Executive Director for Corporate Resources will continue to monitor interest rates in the financial markets and adopt a pragmatic and cautious approach to changing circumstances. For instance, if it was felt that there was a significant risk of a sharp fall in long and short term rates then long term borrowing will be postponed and potential rescheduling from fixed rate funding into short-term borrowing considered. Any such decisions would be reported to Mayor and Cabinet and subsequently Council, at the next available opportunity.
- 10.41. Alternatively, if it was felt that there was a significant risk of a much sharper rise in long and short term rates than that currently forecast (perhaps arising from an acceleration in rate of increase in central rates in the USA and UK, an increase in world economic activity or a sudden increase in inflation risks) then the portfolio position will be re-appraised. Most likely, fixed rate funding will be drawn whilst interest rates are lower than they are projected to be in future years. Once again, any such decisions would be reported to Mayor and Cabinet and subsequently Council, at the next available opportunity.

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Policy on Borrowing in Advance of Need

- 10.42. Members should note that the Council's policy is not to borrow more than or in advance of its needs purely in order to profit from the investment of the extra sums borrowed. Any decision to borrow in advance will be within the approved forward CFR estimates and will be considered carefully to ensure that value for money can be demonstrated and that the Council can ensure the security of such funds.

Debt Rescheduling

- 10.43. Rescheduling of current borrowing in our debt portfolio is unlikely to occur as there is still a large difference between premature redemption rates and new borrowing rates.
- 10.44. If rescheduling is to be undertaken, it will be reported to the Mayor and Cabinet at the earliest meeting following its action.

Sources of borrowing

- 10.45. The approved sources of long-term and short-term borrowing are:
1. HM Treasury's PWLB lending facility (formerly the Public Works Loan Board)
 2. any institution approved for investments (see below)
 3. any other bank or building society authorised to operate in the UK
 4. any other UK public sector body
 5. UK public and private sector pension funds (except Lewisham Pension Fund)
 6. UK Municipal Bonds Agency plc and other special purpose companies created to enable local authority bond issues
 7. investors in capital market bonds and retail bonds issued by the Council
 8. individuals lending via a peer-to-peer platform where appropriate Individuals lending via a peer-to-peer platform where any necessary counterparty checks (for example proof of identity or money laundering requirements) are conducted by the platform
 9. investors in capital market bonds and retail bonds issued by the Council
- 10.46. Other sources of debt finance: In addition, capital finance may be raised by the following methods that are not borrowing, but may be classed as other debt liabilities:
1. Leasing
 2. Hire purchase
 3. Private Finance Initiative
 4. Sale and leaseback

Treasury Indicators

- 10.47. There are three debt-related treasury activity limits. The purpose of these are to restrain the activity of the treasury function within certain limits, thereby managing risk and reducing the impact of any adverse movement in interest rates. These limits need to be balanced against the requirement for the treasury function to retain some flexibility to enable it to respond quickly to opportunities to reduce costs and improve performance.
- 10.48. The debt related indicators are:

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- Upper limits on variable interest rate exposure. This identifies a maximum limit for variable interest rates based upon the debt position net of investments;
- Upper limits on fixed interest rate exposure. This is similar to the previous indicator and covers a maximum limit on fixed interest rates; and
- Maturity structure of borrowing. These gross limits are set to reduce the Council's exposure to large fixed rate sums falling due for refinancing and are required for upper and lower limits.

10.49. The treasury indicators and limits are set out in the table below:

Table D6: Limits of Interest Rates

Limits on Interest Rate Exposures	2023/24	2024/25	2025/26
	Upper	Upper	Upper
Limits on fixed interest rates:			
• Debt	100%	100%	100%
• Investments* :	90%	90%	90%
Limits on variable interest rates			
• Debt	15%	15%	15%
• Investments*	50%	50%	50%
* For this calculation short term investments (less than 12 months) are treated as fixed interest rates. Money Market Funds are included in investments.			
Limits on Maturity Structure of Fixed Interest Rate Borrowing 2022/23			
	Lower	Upper	
Under 12 months	0%	10%	
12 months to 2 years	0%	10%	
2 years to 5 years	0%	10%	
5 years to 10 years	0%	25%	
10 years to 20 years	0%	25%	
20 years to 30 years	0%	25%	
30 years to 40 years	0%	50%	
40 years to 50 years	0%	60%	
Limits on Maturity Structure of Variable Interest Rate Borrowing 2022/23			
	Lower	Upper	
30 years to 40 years	0%	60%	
40 years to 50 years	0%	40%	

Long Term Investments Indicator

10.50. This indicator sets a limit on the total principal funds invested for greater than 365 days. This limit is set with regard to the Council's liquidity requirements and to manage the risks associated with the possibility of loss which may arise as a result of having to seek early repayment, or redemption of, principal sums invested.

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- 10.51. The indicator is set out in Table 6 below. As at 31 March 2023, the Council is not expected to hold any investments for longer than 365 days.

Table D7: Treasury Indicators and Limits

Maximum Principal Sums Invested for Longer than 365 days			
	2023/24 £m	2024/25 £m	2025/26 £m
Limit on principal sums invested for longer than 365 days	50.0	50.0	50.0

Debt Rescheduling

- 10.52. As short-term borrowing rates will be considerably cheaper than longer term fixed interest rates, there may be potential opportunities to generate efficiencies by switching from long-term debt to short-term debt. However, these efficiencies will need to be considered in light of the current treasury position and the size of the cost of debt repayment (premiums incurred).
- 10.53. The reasons for any rescheduling to take place will include:
- The generation of cash savings and/or discounted cash flow savings;
 - Helping to fulfil the Treasury Strategy; and
 - Enhancing the balance of the portfolio (to amend the maturity profile and/or the balance of volatility).
- 10.54. The Council will continue to explore rescheduling opportunities as appropriate in respect of the financing of its PFIs and external loans.
- 10.55. The Council has £120m of LOBO loans at nominal value as at 31 March 2023 of which £35m will be in their call period in 2023/24 for fixed rate LOBO loans, along with £13.7m of capitalised interest in respect of the stepped LOBO loan. In the event that the lender exercises the option to change the rate or terms of the loans within their call period, the Council will consider the terms being provided and also the option of repayment of the loan without penalty.
- 10.56. Debt rescheduling opportunities will be monitored on a regular basis and if an opportunity arises to repay borrowing on favourable terms then this will be considered by the Executive Director of Corporate Resources. Any debt rescheduling that takes place will be reported to Mayor and Cabinet and subsequently to Council at the earliest meeting possible.

Annual Investment Strategy Investment Policy – Management of Risk

- 10.57. The Department for Levelling Up, Housing and Communities (DLUHC) and CIPFA have extended the meaning of 'investments' to include both financial and non-financial investments. This report deals predominantly with financial instruments (as managed by the Strategic Finance – Treasury Team); non-financial investments, essentially the purchase of income yielding assets, are summarised at the end of this report and covered in detail within the separate Capital Strategy.

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- 10.58. The Council's investment policy has regard to DLUHC's Guidance on Local Government Investments ("the Guidance"), the CIPFA Treasury Management in Public Services Code of Practice and Cross Sectoral Guidance Notes ("the CIPFA TM Code"), and CIPFA's Treasury Management Guidance Notes 2021.
- 10.59. The Council's investment priorities will be security first, liquidity second, then return. The Council will aim to achieve the optimum return (yield) on its investments commensurate with proper levels of security and liquidity and within the Council's risk appetite. In the current economic climate it is considered appropriate to maintain a degree of liquidity to cover cash flow needs but to also consider investments for periods up to 12 months with high credit rated financial institutions, whilst investment rates remain elevated, as well as wider range fund options.
- 10.60. The Council uses Link Group, Treasury Solutions as its external treasury management advisor. The Council recognises that responsibility for treasury management decisions remains with the Council at all times and will ensure that undue reliance is not placed upon our external service providers. All decisions will be undertaken with regards to all available information including, but not solely, our treasury advisors. It also recognises that there is value in employing external providers of treasury management services in order to acquire access to specialist skills and resources. The Council will ensure that the terms of their appointment and the methods by which their value will be assessed are properly agreed and documented, and subjected to regular review.
- 10.61. The Guidance and CIPFA Treasury Management Code place a high priority on the management of risk. The Council has adopted a prudent approach to managing risk and defines its risk appetite by the following means:
1. Minimum acceptable **credit criteria** are applied in order to generate a list of highly creditworthy counterparties which also enables diversification and thus avoidance of concentration risk. The key ratings used to monitor counterparties are the short term and long term ratings.
 2. **Other information**; ratings will not be the sole determinant of the quality of an institution; it is important to continually assess and monitor the financial sector on both a micro and macro basis and in relation to the economic and political environments in which institutions operate. The assessment will also take account of information that reflects the opinion of the markets. To this end, the Council will engage with its advisors to maintain a monitor on market pricing such as "**credit default swaps**" and overlay that information on top of the credit ratings, as well as information on outlooks and watches. This is fully integrated into the credit methodology provided by the advisors in producing its colour codings which show the varying degrees of suggested institution creditworthiness. This has been set out in more detail at Appendix 2.
 3. **Other information sources** used will include the financial press, share prices and other such information pertaining to the financial sector in order to establish the most robust scrutiny process on the suitability of potential investment counterparties.
 4. The Council has defined the list of **types of investment instruments** that the treasury team are authorised to use in the financial year, and these are listed in Appendix 2 under the categories of "specified" and "non-specified" investments:
 - **Specified investments** are those with a high level of credit quality and subject to a maturity limit of one year; and
 - **Non-specified investments** are those with less high credit quality, may be

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for periods in excess of one year, and/or are more complex instruments which require greater consideration by Members and officers before being authorised for use.

5. **Lending limits** (amounts and maturity) for each counterparty will be set through applying the credit criteria provided by advisors, and are set out in Appendix 2.
 6. **Interest rate limits** are set out in Table 5 above and place restrictions on the exposure to variable and fixed rate investments.
 7. The Council has placed a limit on the amount of its investments which are invested for **longer than 365 days** Table 6 above.
 8. Investments will only be placed with counterparties from countries with a specified minimum **sovereign rating** (see Appendix Z5).
 9. All investments will be denominated in **sterling**.
 10. As a result of the change in accounting standards for 2022/23 under IFRS 9, the Council will, on an ongoing basis, consider the implications of investment instruments which could result in an adverse movement in the value of the amount invested and resultant changes at the end of the year to the General Fund. (In November 2018 a temporary override allowed local authorities a statutory override to delay implementation of IFRS 9 for five years ending 31.3.23. At the current juncture it has not been determined whether a further extension to the over-ride will be agreed by Government. The Council does not at present have any pooled investments, though has scope to do so as per the creditworthiness policy in Appendix Z2.)
- 10.62. Investments will be made with reference to the core balances and cash flow requirements and the outlook for short-term interest rates (i.e. rates for investments up to 12 months). In order to maintain sufficient liquidity, the Council will seek to utilise its notice accounts, certificates of deposit, money market funds and short-dated deposits (overnight to three months. The remainder of its investments will be placed in fixed term deposits of up to 24 months to generate improved returns, depending on prevailing market conditions.
- 10.63. The Council will pursue value for money in treasury management and will monitor the yield from investment income against appropriate benchmarks for investment performance. Regular monitoring of investment performance will be carried out during the year.

Creditworthiness Policy

- 10.64. The Council's Treasury Team applies the creditworthiness service provided by its advisors Link Group. This service employs a sophisticated modelling approach utilising credit ratings from the three main credit rating agencies - Fitch, Moody's and Standard and Poor's. The credit ratings of counterparties are supplemented with the following overlays:
- Credit watches and credit outlooks from credit rating agencies;
 - CDS spreads that may give early warning of changes in credit ratings; and
 - Sovereign ratings to select counterparties from only the most creditworthy countries.
- 10.65. This modelling approach combines credit ratings, credit watches and credit outlooks in a weighted scoring system which is then combined with an overlay of CDS spreads for which the end product is a series of colour coded bands which indicate the relative creditworthiness of counterparties. These colour codes are used by the Council to

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determine the suggested duration for investments. The Council will therefore use counterparties within the following durational bands:

- Yellow 5 years*
- Purple 2 years
- Blue 1 year (only applies to nationalised or semi nationalised UK Banks)
- Orange 1 year
- Red 6 months
- Green 100 days
- No colour Not to be used**

*for UK Government debt, or its equivalent, Constant Net Asset Value (CNAV) money market funds and collateralised deposits where the collateral is UK Government debt.

**except for those building societies rated BBB- or higher as set out in the policy.

Country limits

- 10.66. The Council has determined that it will only use approved counterparties from the UK and from other countries with a minimum sovereign credit rating of AA- from Fitch. The list of countries that qualify using this credit criteria as at the date of this report are shown in Appendix Z5. This list will be added to, or deducted from, by officers should country ratings change in accordance with this policy.

Building Societies

- 10.67. The Council can invest in UK building societies with a minimum credit rating of BBB- from Fitch (or equivalent), specifically those that are shown on Link Group's lending list only (but which may be rated 'No colour') for a maximum of three months and limited to £20m per institution.
- 10.68. Very few building societies have credit ratings assigned to them due to the lack of large ticket funding transactions that would warrant a formal credit rating being issued by one of the three main ratings agencies, and only a select few within the top ten by asset size have been issued with one. A credit rating of BBB- remains within the 'investment grade' category, subject to moderate credit risk, which is reflected by the monetary and duration limits as set out above.
- 10.69. This addition to the strategy was made as a result of economic conditions and the reduced options available for investing at positive yields; in practice it opens up a limited number of two-three additional counterparties for consideration. Officers will continue to monitor the rating movements against these counterparties to ensure that any investments fall within the set criteria.

Prospects for Investment Returns

- 10.70. Investment returns are likely to remain high during 2023/24 but rates are expected to fall in 2024/25 if the inflation rate is falling. The war in Ukraine has caused huge economic damage to the UK and economies around the world by putting up the costs of food and energy. The inflation rate increased to over 10% which put up the cost of living. The Bank of England has taken strong action by raising the Bank Rate from 0.10% to 3% over the course of eight months and indicated that there could be further rate increase in 2023.
- 10.71. Money market yields have increased in line with increases in the Bank of England base rate. Additionally, investor cash flow uncertainty.

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- 10.72. The Council uses the services of its advisor, Link Group, to formulate a view on interest rates; their view is that there will be a slowdown in the Bank Rate rises in 2023 and rates will start to fall in 2024/25. It will be at least March 2025 before the UK economic starts to recover and it is expected to be a slow recovery. Given this uncertainty, suggested fixed investment returns are expected to remain high at about 4% and money market funds for short term cash investment will provide a lower return of about 2%.
- 10.73. In light of these predictions for high returns and the uncertainty in the markets the Council will continue to invest in fixed term deposits of 3 to 12 month duration. The Council assess, with support from its advisors, will look at other investments for 2-3 years so that it may be able to fix into a good rates of return if the interest rates are expected to fall in 2024/25.
- 10.74. The Council's investment will be reviewed on a regular basis so that it can monitor the Council's liquidity requirements and the requirement for cash towards the capital programme. The capital programme is expected to require funding from the Council as set out in Capital Funding in section 7 of this report. The Council can use the cash from its investments or take out new borrowing to fund the capital programme. Any new investments will be carried out using guidance from the Council's advisors and will continue to meet the objectives of security, liquidity and return.
- 10.75. A more extensive table of interest rate forecasts for December 2022 onwards, including Public Works Loan Board (PWLB) borrowing rate forecasts, is set out in Appendix Z1.

Non-Treasury Investments

- 10.76. Treasury management investments represent the placement of cash in relation to the S12 Local Government Act 2003 investment powers, i.e. they represent investments using the residual cash available to the Council from its day to day activities, under security, liquidity and yield principles.
- 10.77. The Council recognises that non-treasury investments in other financial assets and property primarily for financial return, taken for non-treasury management purposes, requires careful management. Such investments tend to be either:
- Service type investments; whereby capital or revenue cash is advanced for a specific Council objective and will be approved directly through Committee. This may be an advance to a third party for economic regeneration, investments in subsidiaries and joint ventures, etc.
 - Commercial type investments; whereby the objective is primarily to generate capital or revenue resources to help facilitate Council services.
- 10.78. The Council's risk appetite for these investments is reviewed on a case-by-case basis depending on the scale and nature, and strategic fit, of the proposed investment. Where such non-treasury investments exist, they will be identified and summarised at high level within this strategy. The detail and rationale for non-treasury investments are covered in the separate Capital Strategy.

Subsidiary Companies

- 10.79. The Council has two wholly owned subsidiary companies, Lewisham Homes Limited and Catford Regeneration Partnership Limited (CRPL). It has invested in these subsidiaries as summarised below.

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Lewisham Homes Limited

- 10.80. Lewisham Homes is 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 19,000 homes.
- 10.81. The Council has to date agreed two separate loan facilities with Lewisham Homes, the first on commercial terms financed from internal borrowing and the second on cost-neutral terms financed through the PWLB. Both loans allow Lewisham Homes to purchase properties to address temporary accommodation needs in the borough, and will be repaid on set maturity dates.
- 10.82. Agreement of the property acquisition programme and relevant loan agreements was obtained from Mayor and Cabinet. State Aid issues and other risks and mitigations were considered in the approval of the loan facilities, including for the second loan the requirement for collateral against the loan in order to obtain MRP exemption.
- 10.83. As at 31 March 2023 the Council has advanced all £20m of the commercial loan facility, and all £20m of the agreed facility financed from PWLB debt.

Catford Regeneration Partnership Limited (CRPL)

- 10.84. The CRPL is a property investment company created in January 2010 which owns the Catford Shopping Centre and several neighbouring properties used to generate income whilst driving forward a regeneration programme for the town centre and surrounding area.
- 10.85. The Council has existing loan agreements in place with the CRPL, currently on an interest only basis, with interest being capitalised until 2024/25. As at 31 March 2023 the Council expects the outstanding loan principal to be approximately £16.1m.

Other Non-Treasury Investments

Besson Street Joint Venture

- 10.86. The Council is an equal equity partner in a joint venture with Grainger Plc. to bring forward the development of the currently vacant Besson Street site to provide properties for the Private Rented Sector on long term tenancies. The Council has invested land at this stage and will be required to put forward an estimated £22-27m of cash to make up its share (50%) of the 40% equity, with 60% external long-term borrowing, to be invested once the scheme is built. This is currently forecast to be in 2026/27.
- 10.87. The Council also holds minority stakes in the following:
 - 10% in Lewisham Schools for the Future LEP Limited, a Local Education Partnership established under the Council's Building Schools for the Future (BSF) programme to rebuild and refurbish secondary schools within the borough;
 - Less than 1% in South-East London Combined Heat and Power Ltd (SELCHP), a joint venture with the London Borough of Greenwich for the provision of waste disposal and waste to energy processes; and
 - A minority share in Newable Ltd (formerly Greater London Enterprise Ltd) which provides property management and consultancy services.

Investment Portfolio (as at 1 January 2023)

- 10.88. In accordance with the Treasury Management Code, it is the Council's priority to ensure security of capital and liquidity, and to obtain an appropriate level of return which is consistent with the Council's risk appetite. In the current economic climate it is considered appropriate to keep investments short term to cover cash flow needs, but also to seek out value available in periods up to 12 months with high credit rated financial institutions, using the Link suggested creditworthiness approach, including a minimum sovereign credit rating and Credit Default Swap (CDS) overlay information. As set out above, interest rates have been on the rise and the Bank Rate is now at 3.00%. Given the current risk environment and economic uncertainty, investment returns are expected to remain high in 2023/24.
- 10.89. Money Market Fund (MMF) yields have also increased in line with the increases in the Bank of England base rate. The Money Market Funds are used to invest surplus cash that is then available to meet the needs of the Council to meet its obligations. for cash flow purposes to pau the are still offering a marginally positive return, as are a number of financial institutions. The increase to the Bank Rate in December 2021 has resulted in a slight increase to interest rates although these remain considerably lower than pre-pandemic levels.

Performance as at 1 January 2023

- 10.90. The Council is a member of a treasury benchmarking group (organised by Link Asset Services) containing 15 authorities, including 12 other London authorities. An extract from the latest available benchmarking report is shown in Appendix Z3; this shows that the return on investments as at September 2022 is above the benchmarking group model weighted average rate of return, which is adjusted for the risks inherent in the portfolio. The Council's portfolio performance is ahead of the overall benchmarking group, as well as a wider group of 22 London boroughs.
- 10.91. **Table D8.** A full list of outstanding investments held as at 1 January 2023 is shown below:

Counterparty	Duration (Days)	Value £m	Interest Rate	Interest £
Fixed Rate Investments – Banks and Building Societies				
National Westminster Bank PLC (RFB)	364	10.0	1.03%	£102,718
DBS Bank Ltd.	364	5.0	0.95%	£47,500
Goldman Sachs International Bank	184	20.0	2.94%	£296,416
Standard Chartered Bank	184	5.0	3.02%	£76,121
National Westminster Bank PLC (RFB)	181	20.0	3.36%	£333,238
Bank of Montreal	364	15.0	1.83%	£273,748
DBS Bank Ltd.	182	5.0	4.10%	£102,219
Toronto-Dominion Bank	364	5.0	1.98%	£99,000
Landesbank Hessen-Thueringen Girozentrale	273	10.0	2.80%	£209,425
Standard Chartered Bank	181	15.0	4.03%	£299,766
Australia and New Zealand Banking Group	365	15.0	2.05%	£306,658
Toronto-Dominion Bank	184	5.0	2.10%	£105,000
DBS Bank Ltd.	365	15.0	2.75%	£412,500
OP Corporate Bank plc	365	25.0	2.95%	£737,500
National Westminster Bank PLC (RFB)	364	10.0	4.75%	£473,699
Australia and New Zealand Banking Group	365	10.0	4.93%	£493,000
Landesbank Hessen-Thueringen Girozentrale	365	15.0	5.07%	£760,500

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Counterparty	Duration (Days)	Value £m	Interest Rate	Interest £
Bank of Montreal	364	10.0	4.68%	£468,000
Toronto-Dominion Bank	365	15.0	4.85%	£725,507
Norddeutsche Landesbank Girozentrale	92	15.0	3.80%	£140,548
Variable Rate Investments – Money Markets				
Aberdeen Standard	N/A	30.0	3.28%	N/A
BlackRock	N/A	30.0	3.21%	N/A
Federated Hermes	N/A	30.0	3.26%	N/A
Goldman Sachs	N/A	0.0	3.18%	N/A
Insight	N/A	20.3	3.18%	N/A
TOTAL INVESTMENTS		355.3		

10.92. The current investment counterparty criteria as set out in the Credit Worthiness Policy and included at Appendix 2 of this report are meeting the requirements of the treasury management function, although the current low rate environment and the reluctance of banks and building societies to accept new deposits reduces the available pool of counterparties that meet guideline investment rates.

Training

10.93. The CIPFA Code 2021 state that they expect all organisations to have comprehensive knowledge and skills or training policy for the effective acquisition and retention of treasury management knowledge and skills for those responsible for management, delivery, governance and decision making.

11. Capital Programme

Introduction

11.1. This section highlights the 2022/23 Capital Programme position as at December 2022 and also presents the proposed Capital Programme for 2023/24 to 2026/27.

Update on 2022/23 Capital Programme

11.2. Progress in delivering the 2022/23 Capital Programme has been reported to Mayor and Cabinet and the Public Accounts Select Committee throughout the year. The latest forecast projection was an in year revised budget allocation of £196.7m, reported to Mayor and Cabinet on 11th January 2023 as part of Financial Monitoring P7.

11.3. The revised capital programme budget allocation for the year 2022/23 is now £185.1m to P9, of which £45.0m relates to General Fund schemes and £140.1m to Housing Revenue Account (HRA) schemes. This is summarised in Table E1.

Table E1: Current position of the 2022/23 Capital Programme

2022/23 Capital Programme	Revised Budget - Dec 2022	Spend to Date - 31st Dec 2022	% Spend to Date
	£m	£m	
GENERAL FUND			
Achilles St Development	0.8	0.4	54%
Asset Management Programme	0.7	0.4	53%
Beckenham Place Park (Inc. Eastern Part)	0.7	0.6	80%
Broadway Theatre	6.2	4.4	72%

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Catford Library (Winslade Way)	0.4	0.4	97%
Catford Phase 1 – Thomas Lane Yard/ CCC	0.3	0.1	47%
Catford Station Improvements	0.1	0.0	29%
Catford Town Centre	0.3	0.1	40%
CCTV Modernisation	0.5	-	0%
Corporate Estate Maintenance	1.7	0.4	22%
Deptford Southern Sites Regeneration	1.0	0.5	52%
Edward St. Development	1.3	0.1	12%
Greenvale School	2.1	1.9	91%
Highways & Bridges – LBL	4.7	1.5	32%
Highways & Bridges – TfL	0.4	0.3	66%
ICT - Tech Refresh	0.6	-	0%
Lewisham Gateway (Phase 2)	2.9	0.8	28%
Milford Towers Decant	0.3	0.0	0%
Other AMP Schemes	1.0	0.5	52%
Other General Fund Housing Schemes	2.6	1.0	37%
Other Miscellaneous Schemes	1.6	0.7	45%
Place Ladywell	1.0	0.6	55%
Private Sector Grants and Loans	0.6	0.3	47%
Public Sector Decarbonisation	1.8	1.5	81%
Riverside Youth Club	0.1	0.0	17%
Schools – Minor Works	3.8	2.8	74%
Schools – Other	0.2	0.1	43%
Schools - School Places Programme	0.7	0.3	43%
Temporary Accommodation - Canonbie Rd	0.6	0.2	38%
Temporary Accommodation - Manor Avenue	0.2	0.0	38%
Temporary Accommodation - Mayow Rd	5.9	4.3	16%
Temporary Accommodation - Morton House	0.1	0.0	72%
Travellers Site Relocation	0.0	0.1	70%
Watergate School	0.2	0.1	40%
TOTAL GENERAL FUND	45.0	24.3	54%
HOUSING REVENUE ACCOUNT			
Building for Lewisham Programme(BFL)	65.6	28.2	43%
Decent Homes Programme	67.3	29.3	44%
Housing Management System	2.2	0.0	1%
Other Schemes, including PFI and Acquisitions	4.2	-	0%
Other HRA Schemes	0.9	0.3	34%
TOTAL HOUSING REVENUE ACCOUNT	140.1	57.8	41%
TOTAL CAPITAL PROGRAMME	185.1	82.1	44%

- 11.4. Spend to date as at 31st Dec 2022 is £82.1m which is 44% of the revised in-year budget allocation. This is split into £24.3m (54%) for the General Fund, and £57.8m (41%) for the Housing Revenue Account. Notwithstanding, the relevant services are reporting that they expect the remaining budget for the majority of schemes will be spent in the last three months of the year. This is due to a number of schemes with large contracts that are committed for completion in the later stages of the year.
- 11.5. If a scheme is underspent due to slippage at the end of financial year, then the remaining budget will be rolled forward and added to the budget for the following financial year(s).
- 11.6. The financing of the 2022/23 Capital Programme is set out in the Table 2. This shows the sources of funding used to finance the £45.0m General Fund programme, with the

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majority coming from capital reserves and grants and the £140.1 HRA programme, with the majority coming from prudential borrowing and HRA reserves.

Table E2:2022/23 Financing

	2022/23 Financing
	£m
GENERAL FUND	
Capital Receipts	1.6
Capital Reserves	10.5
Community Infrastructure Levy (CIL)	0.0
Corporate Reserves	4.3
Grants	12.6
HRA Receipts	0.0
Prudential Borrowing (incl. internal borrowing)	7.4
Right to Buy (RTB) Receipts	2.9
s106	5.7
TOTAL GENERAL FUND	45.0
HOUSING REVENUE ACCOUNT	
Prudential Borrowing (incl. internal borrowing)	36.1
Grants	32.9
Sale Receipts	2.6
Other Receipts	17.8
s106	0.0
Reserves/Revenue/MRR	50.7
TOTAL HOUSING REVENUE ACCOUNT	140.1
TOTAL CAPITAL PROGRAMME	185.1

Building for Lewisham (BfL) - Capitalisation of Development Costs

- 11.7. The BfL programme, across both the General Fund and Housing Revenue Account, has continued to experience significant slippage in 2022/23 on the delivery of capital schemes. The reasons largely follow the macro-economic challenges being faced in the UK currently, and include:
- The time taken to bring schemes forward to planning and complete successful engagement with the community before moving to procuring main contractors;
 - Following the Covid pandemic there have been global supply chain disruptions for construction materials, up to and including company failures mid-project;
 - Made more challenging with labour shortages, exacerbated by the impact of Brexit on net migration, in this sector and the South East in particular and;
 - Inflation rising to over 40 years highs which has put further unexpected cost pressures on scheme budgets, evidenced through contractors seeking to negotiate variances to scheme costs.
- 11.8. In addition to the direct site preparation and construction costs of schemes, within the total scheme costs capital budgets are set aside for preparing schemes (development allowances) and the cost of borrowing. The slippage does not immediately impact the cost of borrowing as the debt is not taken on until there is certainty the scheme is being built out. However, the slippage does affect the development allowance budgets. They are currently £0.5m for the Council's work and £1.9m for Lewisham Homes' work. Where capital schemes have not progressed, but these budgets have been spent by the development teams these costs cannot be capitalised (i.e. cannot be amortised).

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over the 40 year life of the scheme nor funded from capital reserves, grant or borrowing) and must be taken in full to the Council's or Lewisham Homes' revenue account. Effectively this is a pressure to reserves as a result of slippage.

- 11.9. For 2022/23 the outturn forecast for the Building for Lewisham charge to revenue is c£2m, compared to £0.7m in 2021/22. There are no longer the Covid funds from government to meet such costs of business disruption so these costs will need to be funded from reserves. Looking forward to 2023/24, the development teams in both the Council and Lewisham Homes are being merged to mitigate this risk while the market stabilises and to enable the Council to maintain focus on the ambition of the Building for Lewisham capital programme.

Proposed Capital Programme 2023/24 to 2026/27

- 11.10. The proposed Capital Programme budget for the General Fund and Housing Revenue Account for the four years from 2023/24 to 2026/27 is £480.6m. This is split into £86.7m for the General Fund and £393.9m for the Housing Revenue Account. Of this programme £193.3m is phased into 2023/24 with £51.4m with the General Fund and £142.0m with the Housing Revenue Account. This is detailed in Table E3.

Table E3: Capital Programme 2023/24 – 2026/27

	2023/24 Budget	2024/25 Budget	2025/26 Budget	2026/27 Budget	Total
	£m	£m	£m	£m	£m
GENERAL FUND					
Achilles St Development	3.4	3.4	7.8	-	14.6
Asset Management Programme	0.4	0.3	-	-	0.7
Beckenham Place Park (Inc. Eastern Part)	1.2	-	-	-	1.2
Broadway Theatre	0.4	-	-	-	0.4
Catford Phase 1 – Thomas Lane Yard/ CCC	2.4	0.3	-	-	2.7
Catford Station Improvements	1.0	0.3	-	-	1.3
Corporate Estate Maintenance	3.0	-	-	-	3.0
Edward St. Development	13.7	0.7	-	-	14.5
Greenvale School	0.4	-	-	-	0.4
ICT - Tech Refresh	0.5	-	-	-	0.5
Lewisham Gateway (Phase 2)	4.8	-	-	-	4.8
Milford Towers Decant	0.3	0.3	2.9	-	3.4
Other AMP Schemes	1.0	-	-	-	1.0
Other General Fund Housing Schemes	2.9	2.3	2.8	3.3	11.3
Other Miscellaneous Schemes	0.9	0.1	-	-	0.9
Private Sector Grants and Loans	0.7	0.8	0.9	1.0	3.4
Riverside Youth Club	1.2	0.0	-	-	1.2
Schools – Minor Works	1.7	-	-	-	1.7
Schools – Other	2.5	-	-	-	2.5
Schools - School Places Programme	0.7	0.3	-	-	1.0
Schools - Unallocated	1.0	-	-	-	1.0
Temporary Accommodation - Manor Avenue	1.1	-	-	-	1.1
Temporary Accommodation - Mayow Rd	0.3	-	-	-	0.3
Temporary Accommodation - Morton House	1.5	-	-	-	1.5
Travellers Site Relocation	1.0	2.7	-	-	3.7
Watergate School	3.5	5.1	-	-	8.6
TOTAL GENERAL FUND	51.4	16.6	14.4	4.3	86.7
HOUSING REVENUE ACCOUNT					

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Building for Lewisham Programme(BFL)	72.7	78.8	19.0	4.9	175.4
Decent Homes Programme	66.3	67.5	68.8	3.4	206.1
Other Schemes, including PFI and Acquisitions	2.1	2.2	3.1	3.2	10.6
Other HRA Schemes	0.9	0.9	-	-	1.8
TOTAL HOUSING REVENUE ACCOUNT	142.0	149.5	91.0	11.5	393.9
TOTAL CAPITAL PROGRAMME	193.3	166.1	105.4	15.8	480.6

- 11.11. The HRA figures in the above table differ from the figures presented in section 9 in the HRA Business Plan. This is because the above table only includes schemes that have been approved by Mayor & Cabinet, whereas section 9 includes both approved schemes and unapproved pipeline schemes.
- 11.12. Although the value of the overall Capital Programme will remain largely the same, the Capital Programme is subject to change for various reasons:
- New schemes may be agreed and added to the programme throughout the balance of 2022/23 and into 2023/24.
 - Some schemes may no longer be seen as viable and may be paused or aborted.
 - The Council will continue to look for opportunities to secure additional funding from sources such as grants, which can be used to pursue alternative or additional Capital Projects.
 - There will also be a twice yearly re-profiling exercise, in which project managers will have an opportunity to change the profile of their budget to reflect any changes in the project.
 - If a scheme is underspent at the end of a financial year, then the remaining budget will be rolled forward and added to the budget for the following financial year. Therefore, the 2023/24 budget will be amended to include any 2022/23 outturn slippage.
- 11.13. Proposals to bring forward pipeline schemes or amend individual schemes within the programme will be subject to future Member approvals for their inclusion in the funded capital programme. This will ensure the overall strategic fit and affordability criteria for the programme are assured.
- 11.14. The Financing of the 2023/24 to 2026/27 Capital Programme is set out in Table E4.

Table E4: 2023/24 to 2026/27 Financing

	2023/24 Financing	2024/25 Financing	2025/26 Financing	2026/27 Financing	Total
	£m	£m	£m	£m	£m
GENERAL FUND					
Capital Receipts	1.1	0.3	2.3	0.0	3.7
Capital Reserves	5.3	0.5	0.3	0.3	6.4
Corporate Reserves	3.2	0.3	0.0	0.0	3.5
Grants	13.1	7.3	3.4	4.0	27.8
HRA Receipts	0.0	3.1	3.8	0.0	6.8
Prudential Borrowing	20.1	1.1	0.6	0.0	21.8
RTB Receipts	1.8	0.0	4.0	0.0	5.8
s106	6.6	4.2	0.0	0.0	10.8
TOTAL GENERAL FUND	51.4	16.6	14.4	4.3	86.7

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HOUSING REVENUE ACCOUNT					
Prudential Borrowing	88.0	92.1	46.6	1.5	228.2
Grants	25.3	29.2	12.1	2.1	68.6
Sale Receipts	1.7	1.3	3.9	3.1	10.0
s106	0.0	0.2	0.4	0.0	0.6
Reserves/Revenue/MRR	27.0	26.8	28.1	4.8	86.5
TOTAL HOUSING REVENUE ACCOUNT	142.0	149.5	91.0	11.5	393.9
TOTAL CAPITAL PROGRAMME	193.4	166.1	105.4	15.8	480.6

- 11.15. The financing breakdown for the General Fund is 78% internally, from either current reserves, anticipated receipts, and grants or contributions (including s106) with the remaining 22% to be funded externally from borrowing.
- 11.16. The financing breakdown for the Housing Revenue Account is 58% from external borrowing with the remaining 42% from internal reserves, sale & other receipts, and grants or contributions (including s106).

Key Risks to the Capital Programme

- 11.17. There are many risks to the Capital Programme, some of the key ones are listed below:
- Global supply chain disruptions for construction materials due to the COVID-19 pandemic.
 - Increased cost pressures caused by rising inflation rates. This could lead to contractors looking to renegotiate scheme costs.
 - Labour shortages, exacerbated by the impact of Brexit on net migration, in this sector and the South East in particular.
 - Council may need to make additional savings meaning certain schemes may need to be paused/aborted.
 - Contractors going into administration and being unable to complete work on projects.
 - A project may not deliver the expected benefits.
 - Competing priorities for limited resources requires statutory requirements (for example Health & Safety works or new building regulations) to be met first, potentially limiting the number or scale of schemes within the programme.
- 11.18. These risks will all be carefully considered when both monitoring existing schemes and putting forward potential new schemes.

General Fund Capital Programme Highlights

- 11.19. The General Fund Capital Programme includes a wide range of projects and schemes with the aim of making improvements to the Borough. These Schemes include projects to develop assets owned by the Council, projects to develop schools in the Borough and many other projects. Some of the high value General Fund schemes are detailed below.
- 11.20. **Watergate School:** The aim of the project is to expand Watergate Special School to provide an additional 79 primary level Severe Learning Difficulty (SLD) places taking the total number in the expanded school to 187 pupils. The additional spaces will be

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provided in a new 2 storey annex, providing 8 classrooms and associated external play space positioned as close to the school as possible. With 1 additional classroom being refurbished within the main school to provide a total of 9 classrooms. The main driver for this project is the projected and current demand for Special Educational Needs (SEND) Places. The Place Planning Strategy 2017-2022 identified the need for an increased number of SEND school places, as a high number of SEND students currently receive out-of-borough provision (resulting in a high cost to the Authority, and inconvenience to the families). The budget for 2022/23 is £200k most of which is for design work. The total project budget is £9.2m.

- 11.21. **Lewisham Gateway (Phase 2):** Lewisham Gateway is a public-sector led development project between Greater London Authority Land and Property Limited (GLAP) (previously the LDA), Transport for London (TfL), TfL Buses (London Bus Services Limited) and the London Borough of Lewisham. The aim of this project is to improve the highway layout to better integrate Lewisham town centre and the transport interchange and create a development plot. The total project budget is £23.1m, with current and future budgets of £7.6m remaining. 28% of the in-year budget has been spent to date.
- 11.22. **Resurfacing Works (BVR):** The Council's Highways Group Service is currently updating its inventory of highway assets and conducting road condition surveys Borough-wide, in renewed efforts to ensure best value applies and that the worst roads in the Borough are prioritised for treatment. The 2022/23 Highways & Bridges Carriageway Resurfacing and Footway Renewal capital programme is £1.2m.

HRA Capital Programme Highlights

Decent homes Programme

- 11.23. Lewisham Homes are responsible for ensuring council owned stock under their management is brought up to and maintained to a decent level, covering both internal and external works. Through the course of 23/24 these service will be insourced to the Council.
- 11.24. Following on from recent issues highlighted, an action plan has been developed to manage the problems related to damp and disrepair. These include undertaking property MOT's, to fully identify damp & disrepair within the Councils stock managed by Lewisham Homes with the target of completing 1,000 MOT's.
- 11.25. The current stock condition survey shows that 2,400 properties have been identified as suffering from some degree of damp in the stock condition survey. Lewisham Homes are also conducting urgent reviews and physical inspections of every property on their damp and disrepair logs.
- 11.26. Once the results of the MOT's/surveys are known, repairs and follow-up actions are taken to resolve the issues. This may require the allocation of additional resources which are not currently forecast within the current HRA budget allocations. Discussions are on-going with Lewisham Homes on how to fund these works.
- 11.27. The current stock condition survey shows that 2,400 properties have been identified as suffering from some degree of damp in the stock condition survey.

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- 11.28. Lewisham Homes are undertaking face to face, briefings with all DLO operatives and supervisors on reporting poor conditions and safeguarding, where it is being emphasised that not reporting is a failure in their duty of care. This is also being raised in contract meetings with external contractors and making it a standard performance monitoring agenda item.
- 11.29. A review of all repair orders is being carried out to identify inter-property leak cases. Lewisham Homes will be undertaking calls and visits to check problems are resolved. They will also be ensuring decorative damage and making good is carried out as required.
- 11.30. A detailed formal action plan is being developed, and, subject to agreement, the action plan will be populated with timescales and targets for the deliverables and improvements. This plan will be monitored and formally reported against to the Lewisham Homes board and the council.

Building for Lewisham Programme Highlights (General Fund and HRA)

- 11.31. The BfL programme will deliver a significant proportion of new council housing for the borough. In addition, funding for feasibility and preparation of planning and tender information for major strategic projects at Ladywell, Achilles Street Estate and Catford has been allocated; as well as funding for wider feasibility studies for sites across the borough.
- 11.32. The Council, via its development team is also investigating acquisition opportunities on land and sites from the market. These schemes may offer an opportunity to deliver more homes on an expedited timescale.
- 11.33. The current consolidation of the HRA element of the BfL programme notes funding for 1,296 new homes across a mix of tenures. There is also funding for 125 General Fund new homes, giving a total of 1,421. This has been modelled over a 40-year period and has been inflation-adjusted accordingly. However, the assumptions used in this report represent an over-programming of developments and not all developments modelled will necessarily come forward. Therefore, this represents the most budget-intensive scenario. The financial and programme risk associated with the BfL programme will be monitored closely and mitigations implemented accordingly. Should any material changes to this budget be required, approval from Members will be sought.

Edward Street Development & Home Park Housing

- 11.34. There is currently uncertainty surrounding two large committed projects within the Capital Programme, namely “Edward Street Development” & “Home Park Housing”. This uncertainty has arisen due to the original contractor for these projects going into administration. The situation for both of these projects is fluid as work & negotiations are ongoing to determine the next steps. This was reported to Mayor and Cabinet in 2022/23.
- 11.35. Revised costs have been received for the Edward Street project. The following options have arisen and are currently being considered:
 - Complete the consented scheme as per current design. This will significantly exceed the agreed budget because the design is coming at a premium compared to the original contracted cost.
 - Complete the scheme with a number of value engineering options, design intent will be reduced and this may require a return to planning.
 - Complete the scheme, but undertake a redesign to increase the number of homes from 34 to 44. This will require a new planning application.

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- 11.36. Costs are yet to be received for Home Park. Once received, work will be undertaken to determine the best option for this project. Officers are working at pace to bring forward the options in 2023/24 for both these schemes

Other planned capital developments

Community Infrastructure Levy (CIL)

- 11.37. CIL has been collected in the borough since 2015 and to date, £16.1m has been collected. It must be spent by the Council on the provision, improvement, replacement, operation, or maintenance of infrastructure to support the development of the borough as set out in Regulation 59 of the CIL Regulations 2010. The infrastructure itself may be in or outside the borough as long as it supports its development. In section 216(2) of Planning Act 2008 (as amended by Regulation 63), it states that “infrastructure” includes: (a)roads and other transport facilities, (b)flood defences, (c)schools and other educational facilities, (d)medical facilities, (e)sporting and recreational facilities, and (f)open spaces.
- 11.38. The borough’s strategic infrastructure needs are listed in the Council’s Infrastructure Delivery Plan (IDP) which is a living document and updated regularly. This recognises that strategic infrastructure needs in the Borough cannot be fully met by CIL, meaning that projects which are eligible for CIL funding need to be prioritised.
- 11.39. CIL income fluctuates year on year, with c£3m being the average which has been received per year over the last 7 years. None has been spent to date with the Council instead focussing on and prioritising the spend of Section 106 receipts which are legally ring-fenced and in many cases subject to spending deadlines.
- 11.40. It is intended that from the start of the 2022/2023 financial year, CIL monies will be considered for spend on strategic infrastructure projects alongside the Council’s general fund. Governance and prioritisation processes will therefore need to be developed.
- 11.41. In accordance with legal requirements, Strategic CIL spend by the Council must be restricted to the provision, improvement, replacement, operation, or maintenance of infrastructure to support the development of the borough. An added expectation would be that projects are listed in the IDP which is prepared alongside the draft Local Plan and must align with the Corporate Plan. It is assumed that rather than allocating the entire CIL pot in the first year, an annual sum would be set with the exact amount determined through the governance process that would be established.
- 11.42. Existing governance arrangements are in place for the spend of Section 106. Alongside the S106 Board, which deals with small sums of S106 allocation, capital projects are considered by the Regeneration and Capital Programme Delivery Board and the Regeneration Board. Projects which exceed delegated spend limits are then referred to Mayor and Cabinet for approval. This process operates effectively and would be a starting point for any new allocation process.
- 11.43. It is recommended that Mayor and Cabinet agree that officers prepare governance and a prioritisation process, based on the adaptation of existing arrangements, with a recommendation to:
- Explore an annual Strategic CIL budget for infrastructure project allocation
 - Develop an annual process for the allocation of Strategic CIL as part of the budget-setting process

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- Vary the existing governance process for s106 monies agreed by Mayor and Cabinet to accommodate CIL and make any necessary updates to reflect the current Constitution
- Develop a prioritisation process for Strategic CIL projects, to be reviewed after its first year of implementation

Active Travel Fund for Capital Programme

- 11.44. Before the pandemic, the cost of the measures that the Council delivered as part of the Transport Strategy were largely funded by Local Implementation Plan (LIP) funding from Transport for London (TfL). Since March 2020, this funding has been severely disrupted through a series of short-term funding settlements which have meant that there has been no security in long-term allocations and, in turn, has hindered strategic planning across the borough.
- 11.45. Creating a cleaner and greener borough with more active travel and reduced reliance on cars is one of the leading priorities in the Corporate Strategy. A secure funding stream is needed to achieve this and so it is proposed that an Integrated Active Travel Fund is created which identifies all available funding to Public Realm. The IATF will not consist of “new” money, but instead will enable existing funding to be utilised in a more targeted and priority focussed way. It will consolidate highways and transport elements of:
- LIP funding
 - S106
 - S278
 - CIL
 - NCIL
 - Highways maintenance
 - Speed compliance
 - The Council’s new Community Municipal Investment or ‘Green Bond’
 - Other appropriate external funding
- 11.46. The funding will be used to deliver schemes across four themes: walking, cycling, school safety, and road safety. This will enable the Council to deliver a strategically focussed approach to how and where highways and transport funding is spent and provide a greater level of confidence around funding for active travel.

Recommendation

- 11.47. It is recommended that M&C note the capital programme position and recommend that Council approve the 2023/24 to 2026/27 Capital Programme of £480.6m.

12. Consultation on the budget

- 12.1. In setting the various budgets, it is important to have extensive engagement with citizens to consider the overarching challenge facing public services in Lewisham over the next few years. To this end, the Council has undertaken a range of engagement and specific consultation exercises. The specific consultation exercises were:

Rent Setting and Housing Panel

- 12.2. As in previous years, engagement meetings on rents, service charges and garage rent proposals have taken place in line with the existing arrangements through tenant

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representatives. This provided tenant and leasehold representatives of Lewisham Homes with an opportunity on 6th & 12th December 2022 to consider the position and to feedback any views to Mayor & Cabinet. Tenant representatives of Brockley attended a meeting on 5th December 2022 to consider the proposals and feed back comments to Mayor & Cabinet, as well as a drop-in session on 7th December 2022 to provide any additional comments.

- 12.3. Details of comments from the residents' meetings have been set out in Appendix X2 and X3.

Business Ratepayers

- 12.4. Representatives of business ratepayers were consulted online on the Council's outline budget between 5 January and 25 January 2023. This consultation was open to all of the over 10,000 businesses registered in Lewisham.
- 12.5. There were [3] respondents, all of whom answered a few simple questions to better understand the nature of their business operations, who provided feedback on the Council's corporate priorities, and who then presented feedback on what the Council does well and could do better.
- 12.6. Of the [3] responses for consideration, one business is a micro-enterprise, and two are small to medium enterprises. Two thirds of these respondents pay business rates, with one third of them receiving business rates relief.
- 12.7. When asked which of the Council's priorities they valued the most, neither Open Lewisham nor Quality Housing were listed. Health and wellbeing was the most valued, with a strong local economy, greener and cleaner and safer communities all equally prioritised next.

What Lewisham does well

- 12.8. Only two of the three respondents provided positive feedback on elements of the Council's services. This included the good level of business support offered to its businesses and that the north of the borough had good public transport links, safe streets and school streets. People are able to live locally and avoid long journeys to reach work and leisure facilities.
- 12.9. The Council recognises the difference between the north and south of the borough in terms of infrastructure provision and continues to work collaboratively with Transport for London and other partners to secure investment, to ensure that both capital and service delivery provides for all of our residents across all wards.

What Lewisham could do better

- 12.10. In terms of what the Council could do better, the responses generally were grouped into two themes, the street scene and environment, and support for businesses.
- 12.11. There is support for increasing street safety and public transport, and a strong desire for a reduction in graffiti.
- 12.12. The Executive Director for Housing, Regeneration and Public Realm notes these comments. The Council's Active Travel Fund as part of its planned capital programme seeks to increase the number of safe streets and school streets, and will work closely with Transport for London to improve public transport accessibility where possible. As part of the pressures funding for 2023/24 there is specific additional funding being made available to tackle fly tipping and ensure that the Council can continue to tackle and enforce against all types of antisocial or illegal activity on our streets.
- 12.13. In terms of business support, respondents suggested that business rates should be reduced generally and there should be more access to grants. One respondent specifically suggested that new businesses should be entitled to 100% relief in the first year and then a sliding scale for the next five years to enable the business to be

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established. The benefit of this being that the business would be better able to benefit the wider local community and create and protect jobs.

- 12.14. The Executive Director for Corporate Resources notes these comments. Business Rates is governed by legislation, in particular the Local Government Finance Act 1992. Whilst we appreciate the comments in terms of the charges and applicable reliefs for new businesses, the Council are solely responsible for the billing and collection of Business Rates, not the setting of these. There are several available reliefs and discounts to certain businesses. These can be found on the Council's website; www.lewisham.gov.uk. The Council recommends contacting the business rates team to confirm business rates charges before any business commits to a lease. This will assist with budgeting and forecasting.

Summary

- 12.15. The consultation was available to all of the 10,000 plus businesses registered in Lewisham and [three] responses were received.
- 12.16. There were a number of comments and concerns raised regarding the level of business rates tax set by Government and the accessibility and level of relief measures available. In setting its General Fund budget the Council recognises the support needed to businesses and is ensuring that its Resident and Business Services division is able to offer support for businesses, whilst recognising that business rates and the relief and grants schemes are set centrally by Government.
- 12.17. There were also a number of comments provided on the General Fund services affecting businesses in the form of street cleansing, enforcement and safe streets and the need for the Council to continue to ensure that its services provide value for money. These considerations underpin the ambition of the Corporate Strategy to ensure that our businesses can enjoy a Greener and Cleaner Lewisham.

13. Financial implications

- 13.1. This entire report deals with the Council's Budget. Therefore, the financial implications are explained throughout.

14. Legal implications

- 14.1. Many legal implications are referred to in the body of the report. Particular attention is drawn to the following:

Capital Programme

- 14.2. Generally, only expenditure relating to tangible assets (e.g. roads, buildings or other structures, plant, machinery, apparatus and vehicles) can be regarded as capital expenditure. (Section 16 Local Government Act 2003 and regulations made under it).
- 14.3. The Local Government Act 2003 introduced a prudential system of financial control, replacing a system of credit approvals with a system whereby local authorities are free to borrow or invest so long as their capital spending plans are affordable, prudent, and sustainable. Authorities are required to determine and keep under review how much they can afford to borrow having regard to CIPFA's Prudential Code of Capital Finance in Local Authorities. The Code requires that in making borrowing and investment decisions, the Council is to take account of affordability, prudence, and sustainability, value for money, stewardship of assets, service objectives, and practicality.

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- 14.4. Section 11 Local Government Act 2003 allows for regulations to be made requiring an amount equal to the whole or any part of a capital receipt to be paid to the Secretary of State. Since April 2013, there has been no requirement to set aside capital receipts on housing land (SI2013/476). For right to buy receipts, the Council can retain 25% of the net receipt (after taking off transaction costs) and is then entitled to enter an agreement with the Secretary of State to fund replacement homes with the balance. Conditions on the use of the balance of the receipts are that spending has to happen within three years and that 70% of the funding needs to come from Council revenue or borrowing. If the funding is not used within three years, it has to be paid to the Ministry of Housing, Communities and Local Government, with interest. In London, the monies are then transferred to the GLA. However, the Council has entered into an agreement with the GLA where the GLA has agreed in principle that all monies received from central government arising from right to buy disposals in Lewisham will be ring fenced and made available to the Council as social housing grant.

Housing Revenue Account

- 14.5. Section 24 of the Housing Act 1985 provides that a local authority may make such reasonable charges as they determine for the tenancy or occupation of their houses. The Council must review rents from time to time and make such charges as circumstances require.
- 14.6. Under the Local Government and Housing Act 1989, the Council is obliged to maintain a separate HRA (Section 74) and by Section 76 must prevent a debit balance on that account. Rents must therefore be set to avoid such a debit.
- 14.7. By Schedule 4 of the same Act where benefits or amenities arising out of a housing authority functions are provided for persons housed by the authority but are shared by the community, the Authority must make such contribution to the HRA from their other revenues to properly reflect the community's share of the benefits/amenities.
- 14.8. The process for varying the terms of a secure tenancy is set out in Sections 102 and 103 of the Housing Act 1985. It requires the Council to serve notice of variation at least four weeks before the effective date; the provision of sufficient information to explain the variation; and an opportunity for the tenant to serve a Notice to Quit ending their tenancy.
- 14.9. Where the outcome of the rent setting process involves significant changes to housing management practice or policy, further consultation may be required with the tenants' affected in accordance with section 105 of the Housing Act 1985.
- 14.10. Part 7 of the Localism Act 2011 abolished HRA subsidy and moved to a system of self financing in which Councils are allowed to keep the rents received locally to support their housing stock. Section 174 of the same Act provides for agreements between the Secretary of State and Councils to allow Councils not to have to pay a proportion of their capital receipts to the Secretary of State if he/she approves the purpose to which it would be put.

Balanced Budget

- 14.11. In accordance with the Local Government Act 1992 the Council must set its Council Tax for 2021/2022 before 11 March 2021. By law it may not set the Council Tax before receipt of confirmation of the precept from the precepting authority, the GLA which is anticipated on 26 February. A report will be prepared for the Council meeting on 3 March 2021 on the basis of indications from the GLA but the report will be despatched before their final decision. The Executive Director for Corporate Resources will update the Council accordingly before it makes its decision.
- 14.12. Following the introduction of the Local Authorities (Standing Orders)(Amendment)

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Regulations 2014 the Council's Constitution was amended to require that when the Council votes on key budget and Council Tax decisions, the vote must be recorded. This requirement will apply when the Council meets to set the Council Tax.

- 14.13. Members have a duty to ensure that the Council acts lawfully. It must set and maintain a balanced budget each year. The Council must take steps to deal with any projected overspends and identify cuts or other measures to bring the budget under control. If the Capital Programme is overspending, this may be brought back into line through cuts, slippage, or contributions from revenue. The proposals in this report are designed to produce a balanced budget in 2021/22.
- 14.14. In this context, Members are reminded of their fiduciary duty to the Council Tax payer, effectively to act as trustee of the Council's resources and to ensure proper custodianship of Council funds.

An annual budget

- 14.15. By law, the setting of the Council's budget is an annual process. However, to enable meaningful planning, a number of cuts proposals for 2021/22 were anticipated in the course of the budget process. The first round of cuts were approved by Mayor and Cabinet on 9 December 2020. The second round is on the same agenda as this report and will be considered by Mayor and Cabinet before consideration of the recommendations in this report. They are listed in Appendix Y1 and Appendix Y2 respectively of this report. This report is predicated on taking all of the agreed and proposed budget cuts and those budget cuts being successfully implemented. If not, any shortfall will have to be met through adjustments to the annual budget in this report with the use of reserves.
- 14.16. The body of the report refers to the various consultation exercises (for example with tenants and businesses) which the Council has carried out/is carrying out in accordance with statutory requirements relating to this budget process. Mayor and Cabinet must consider the outcome of that consultation with an open mind before reaching a decision about the final proposals to Council. It is noted that the outcome of consultation with business rate payers will only be available from the 2 February 2021 and any decisions about the Mayor and Cabinet's proposals on the budget are subject to consideration of that consultation response which will be reported to Mayor and Cabinet in the budget update report scheduled for the 10 February. Until the outcome of the consultation and any relevant matters are considered by M&C, the decisions sought in this report cannot be final.

Referendum

- 14.17. Sections 72 of the Localism Act 2011 and Schedules 5 to 7 amended the provisions governing the calculation of Council Tax. They provide that if a Council seeks to impose a Council Tax increase in excess of limits fixed by the Secretary of State, then a Council Tax referendum must be held, the results of which are binding. The Council may not implement an increase which exceeds the Secretary of State's limits without holding the referendum. Were the Council to seek to exceed the threshold, substitute calculations which do not exceed the threshold would also have to be drawn up. These would apply in the event that the result of the referendum is not to approve the "excessive" rise in Council Tax. Attention is drawn to the statement of the Secretary of State that the Council may impose a precept of 3% on the Council Tax, ring-fenced for social care provision, and may impose an additional increase of less than 2% without the need for a referendum. The maximum proposed Council Tax increase is 4.99% and therefore below the combined limit.
- 14.18. In relation to each year the Council, as billing authority, must calculate the Council Tax

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requirement and basic amount of tax as set out in Section 31A and 31B of the Local Government Finance Act 1992. These statutory calculations appear in Appendix Y6.

Robustness of estimates and adequacy of reserves

- 14.19. Section 25 of the Local Government Act 2003 requires, when the authority is making its calculations under s31 of the Local Government Finance Act 1992, the Chief Finance Officer to report to it on:-
 - (a) the robustness of the estimates made for the purposes of the Calculations; and
 - (b) the adequacy of the proposed financial reserves.
- 14.20. The Chief Financial Officer's section 25 statement will be appended to the Budget Report to Mayor & Cabinet on 9 February 2022 as Appendix Y5.

Treasury Strategy

- 14.21. Local authorities are also required to produce and keep under review for the forthcoming year a range of indicators based on actual figures. These are set out in the report. The CIPFA Treasury Management Code of Practice says that movement may be made between the various indicators during the year by an Authority's Chief Finance Officer as long as the indicators for the total Authorised Limit and the total Operational Boundary for external debt remain unchanged. Any such changes are to be reported to the next meeting of the Council.
- 14.22. Under Section 5 of the 2003 Act, the prudential indicator for the total Authorised Limit for external debt is deemed to be increased by an amount of any unforeseen payment which becomes due to the Authority within the period to which the limit relates which would include for example additional external funding becoming available but not taken into account by the Authority when determining the Authorised Limit. Where Section 5 of the Act is relied upon to borrow above the Authorised Limit, the Code requires that this fact is reported to the next meeting of the Council.
- 14.23. Authority is delegated to the Executive Director for Corporate Resources to make amendments to the limits on the Council's counterparty list and to undertake Treasury Management in accordance with the CIPFA Treasury Management Code of Practice and the Council's Treasury Policy Statement.

Constitutional provisions

- 14.24. Legislation provides that it is the responsibility of the full Council to set the Council's budget. Once the budget has been set, save for those decisions which they are precluded from, it is for the Mayor and Cabinet to make decisions in accordance with the statutory policy framework and that are not wholly inconsistent with the budget. It is for the Mayor and Cabinet to have overall responsibility for preparing the draft budget for submission to the Council to consider. If the Council does not accept the Mayor and Cabinet's proposals, it may object to them and ask them to reconsider. The Mayor and Cabinet must then reconsider and submit proposals (amended or unamended) back to the Council which may only overturn them by a two-thirds majority.
- 14.25. For these purposes the term "budget" means the "budget requirement (as provided for in the Local Government Finance Act 1992) all the components of the budgetary allocations to different services and projects, proposed taxation levels, contingency funds (reserves and balances) and any plan or strategy for the control of the local authority's borrowing or capital expenditure." (Chapter 2 statutory guidance).
- 14.26. Authorities are advised by the statutory guidance to adopt an inclusive approach to preparing the draft budget, to ensure that councillors in general have the opportunity to

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be involved in the process. However, it is clear that it is for the Mayor and Cabinet to take the lead in that process and proposals to be considered should come from them. The preparation of the proposals in this report has involved the Mayor and Cabinet, the Council's select committees and the Public Accounts Select Committee in particular, thereby complying with the statutory guidance.

Statutory duties and powers

- 14.27. The Council has a number of statutory duties which it must fulfil by law. It cannot lawfully decide not to carry out those duties. However, even where there is a statutory duty, the Council often has discretion about the level of service provision. Where a service is provided by virtue of a Council power rather than a duty, the Council is not bound to carry out those activities, though decisions about them must be taken in accordance with the decision making requirements of administrative law.

Reasonableness and proper process

- 14.28. Decisions must be made reasonably taking into account all relevant considerations and ignoring irrelevancies. Members will see that in relation to the proposed budget cuts there is a summary at Appendix Y1 and Y2. If the Mayor and Cabinet decides that the budget for that service must be reduced, the Council's reorganisation procedure applies if staffing numbers would reduce. Staff consultation in accordance with that procedure will be conducted and in accordance with normal Council practice, the final decision would be made by the relevant Executive Director under delegated authority.
- 14.29. It is also imperative that decisions are taken following proper process. Depending on the particular service concerned, this may be set down in statute, though not all legal requirements are set down in legislation.
- 14.30. For example, depending on the service, there may need to be a need to consult with service users and/or others. The requirement to consult may arise by statute or there may be a legitimate expectation of consultation. A legitimate expectation will arise if a specific promise has been made to do something (for example as in the Lewisham Compact with the voluntary sector) or if it has become practice to consult on particular matters. Where there is a requirement to consult, any proposals in this report must remain proposals unless and until that consultation is complete and the responses have been brought back in a further report for consideration with an open mind before any decision is made.

Staff consultation

- 14.31. Where proposals, if accepted, would result in 100 redundancies or more within a 90 day period, an employer is required by Section 188 of the Trade Union and Labour Relations (Consolidation) Act 1992 as amended, to consult with the representatives of those who may be affected by the proposals. The consultation period is at least 45 days. Where the number is 20 or more, but 99 or less the consultation period is 30 days. This requirement is in addition to the consultation with individuals affected by redundancy and/or reorganisation under the Council's own procedure.

Best Value

- 14.32. Under section 3 of the Local Government Act 1999, the Council is under a best value duty to secure continuous improvement in the way its functions are exercised, having regard to a combination of economy, efficiency, and effectiveness. It must have regard to this duty in making decisions in relation to this report.

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Integration with health

- 14.33. Members are reminded that provisions under the Health and Social Care Act 2012 require local authorities in the exercise of their functions to have regard to the need to integrate their services with health. See "[Legal implications](#)" in the guidance for more information.

15. Equalities implications

- 15.1. The Equality Act 2010 (the Act) introduced the public sector equality duty (the equality duty or the duty). It 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.
- 15.2. 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.
- 15.3. The duty continues to be a "have regard duty", and the weight to be attached to it is a matter for the Mayor and Cabinet, 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. Assessing the potential impact on equality of proposed changes to policies, procedures and practices is one of the key ways in which the Council can demonstrate that they have had 'due regard'.
- 15.4. The Equality and Human Rights Commission 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 services and public functions. 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: <http://www.equalityhumanrights.com/legal-and-policy/equality-act/equality-act-codes-of-practice-and-technical-guidance/>
- 15.5. The Equality and Human Rights Commission (EHRC) has previously 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. Meeting the equality duty in policy and decision-making
 3. Engagement and the equality duty
 4. Equality objectives and the equality duty
 5. Equality information and the equality duty
- 15.6. 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

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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/>

- 15.7. The EHRC has also issued Guidance entitled "Making Fair Financial Decisions". It appears at Appendix Y9 and attention is drawn to its contents.
- 15.8. Assessing impact on equality is not an end to itself and it should be tailored to, and be proportionate to, the decision being made. Whether it is proportionate for the Council to conduct an Equalities Analysis Assessment of the impact on equality of a financial decision or not depends on its relevance to the Authority's particular function and its likely impact on people from protected groups, including staff.
- 15.9. Where proposals are anticipated to have an impact on staffing levels, it will be subject to consultation as stipulated within the Council's Employment/Change Management policies, and services will be required to undertake an Equalities Analysis Assessment (EAA) as part of their restructuring process.
- 15.10. It is also important to note that the Council is subject to the Human Rights Act, and should therefore, also consider the potential impact their particular decisions could have on human rights. Where particular cuts have such implications, they must be dealt with and considered in relation to those particular proposals before any final decision is made.

16. Climate change and environmental implications

- 16.1. Section 40 of the Natural Environment and Rural Communities Act 2006 states that: 'every public authority must, in exercising its functions, have regard, so far as is consistent with the proper exercise of those functions, to the purpose of conserving biodiversity'.
- 16.2. Overall there are limited changes to the budget structure and service funded either from agreed reductions or pressures funded. The environment considerations for any cuts were specifically considered as part of those proposals agreed by M&C. The environment considerations for the pressures to be funded in 2022/23, for example air quality, home energy, and healthier neighbourhood initiatives are positive.

17. Crime and disorder implications

- 17.1. Section 17 of the Crime and Disorder Act 1998 requires the Council when it exercises its functions to have regard to the likely effect of the exercise of those functions on, and the need to do all that it reasonably can to prevent, crime and disorder in its area.
- 17.2. There are no specific crime and disorder implications arising from this report.

18. Health and wellbeing implications

- 18.1. There are no specific health and well being implications arising from this report.

19. Background papers

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Short Title of Report	Date	Location	Contact
Medium Term Financial Strategy	6 July 2022 (M&C)	1st Floor Laurence House	David Austin
Budget Reductions Report 2023/24	7 December 2022 (M&C)	1st Floor Laurence House	David Austin
Council Tax Base	18 January 2023 (Council)	1st Floor Laurence House	David Austin

20. Glossary

Term	Definition
Collection Fund	A statement that shows the transactions of the billing authority in relation to non-domestic rates and the Council Tax, and illustrates the way in which these have been distributed to preceptors and the General Fund.
General Fund	This is the main revenue account which summarises the cost of all services (except those related to Council Housing and Locally Managed Schools) provided by the Council.
Housing Revenue Account	Reflects a statutory obligation to account separately for local authority housing provision. It shows the major elements of housing revenue expenditure and how this is met by rents, subsidy and other income.
Reserves	Amounts set aside for purposes falling outside the definition of provisions made above are considered as reserves.
Revenue Support Grant	A general grant paid by Central Government to local authorities to help them finance the cost of their services, distributed on the basis of government relative needs formulas.

21. Report author and contact

David Austin – Director of Finance david.austin@lewisham.gov.uk

Katharine Nidd – Head of Strategic Finance, Planning and Commercial
katharine.nidd@lewisham.gov.uk

Financial implications on behalf of the Executive Director for Corporate Resources were provided by the report authors.

Legal implications on behalf of the Monitoring Officer were provided by Katherine Kazantzis.

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22. Appendices

Capital Programme

W1 Capital Strategy

Housing Revenue Account

- X1 Proposed Housing Revenue Account Savings 2023/24
- X2 Leasehold and Tenants charges consultation 2023/24 Responses
- X3 Leasehold and Tenants Charges 2023/24 Regenter (Brockley)
- X4 Leasehold and Tenants Charges 2023/24 Lewisham Homes
- X5 Garage Rent Increase Report 2023/24
- X6 Other Associated Housing Charges for 2023/24

General Fund

- Y1 Summary of previously agreed budget reduction proposals for 2023/24
- Y2 Summary of budget reduction proposals for 2023/24
- Y3 2023/24 Budget by Corporate Priority
- Y4 Ready Reckoner for Council Tax 2023/24
- Y5 Chief Financial Officer's Section 25 Statement – to follow
- Y6 Council Tax and Statutory Calculations
- Y7 Summary of risks and pressures to be funded
- Y8 2023/24 Proposed Fees and Charges
- Y9 Making Fair Financial Decisions

Treasury Management

- Z1 Interest Rate Forecasts
- Z2 Credit Worthiness Policy (Linked to Treasury Management Practice (TMP1) – Credit and Counterparty Risk Management)
- Z3 Approved countries for investments
- Z4 Requirement of the CIPFA Management Code of Practice

APPENDICES W1 to Z4 2023/24 BUDGET REPORT

APPENDIX W1 – CAPITAL STRATEGY 2023/24

Capital Strategy

The current capital strategy is underpinned with the prudent approach of only committing to schemes once the financial resources are confirmed and robust due diligence has been undertaken on the delivery plans through effective project management disciplines. This has been applied to the five-year plan set out in the capital section of the budget report. Building on this, the ten-year capital plan will focus on:

General Fund

- Meeting statutory Health & Safety obligations for our corporate assets, such as fire doors, smoke alarms and disability access.
- Investment in temporary accommodation, either through acquisitions of existing buildings or building new ones.
- Undertaking specific cost vs benefit analysis to balance the level in investment in the Highways network and Parks within the Borough with potential insurance costs of not doing so.
- Increasing the number of schools SEN places in order to reduce the number of out of borough placements.
- Utilising opportunities to leverage other grant funding through match funding to deliver schemes – e.g., CCC, levelling up bid etc.,

Housing Revenue Account

- Meeting statutory Health & Safety and new building regulations requirements, such as fire safety measures, structural work and combatting damp issues.
- Completing works to extend the life of existing stock that complement the R&M programme. The main focus will be on reducing energy costs for residents.
- Continuing to look for opportunities to deliver additional new build, as well as complete further stock acquisitions using RTB and estate regeneration where that may be most cost effective.

The ten-to-twenty-year plan will continue to lay the groundwork and explore more significant structural changes to the Place, and the role the Council can play through leveraging its asset base and organisational weight to:

- Promote an ambitious Catford Town Centre development;
- Pressing for the Bakerloo line extension project to Hayes to be recommitted to with the associated housing and business opportunities for the whole Borough;

APPENDICES W1 to Z4 2023/24 BUDGET REPORT

- Working with London and Government to plan for whole estate regeneration where social housing stock comes to the end of its useful life and needs replacing, including the One Public Estate with Health partners.

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

APPENDIX X1: Proposed Housing Revenue Account Savings 2022/23

- 1.1 The HRA strategy and self-financing assessments are continually updated and developed with the view to ensuring resources are available to meet costs and investment needs and are funded for 2023/24 and future years.
- 1.2 Savings and efficiencies delivered in the 2023/24 budget can be re-invested to off-set constrained rent rises or to help bridge any investment gap identified. As a prudent measure the original financial model was developed with no savings identified. Subsequently, discussions have taken place regarding appropriate savings and 'target' management and maintenance costs per unit. For example, there is already an assumed reduction in the Lewisham Homes fee in 2023/24 to reflect stock losses through Right to Buy Sales. Although no direct efficiencies/savings are currently being considered for 2023/24, work continues to identify opportunities for cost reductions and efficiencies relating to the HRA business model. Where identified, these savings would be available to off-set future rental losses due to a constrained uplift to protect investment in stock or services.
- 1.3 An update of the HRA Strategy, Savings Proposals, proposed rent & service charge increases and comments from consultation with tenant representatives will be reported to Mayor and Cabinet as part of the HRA Rents and budget strategy report. Mayor and Cabinet will make the final budget decisions in the New Year.

APPENDICES W1 to Z4 2023/24 BUDGET REPORT

APPENDIX X2: Tenants' rent consultation 2023/24

The Tenants' rent and service charge increase meetings took place on 5th December 2022 with Regenter B3 (Brockley) managed tenants and 12th December 2022 with Lewisham Homes managed tenants. Lewisham Homes also held a meeting with Leaseholders on 6th December 2022. A drop-in session for residents for the Brockley area was held on 7th December 2022.

Views of representatives on rent and service charge changes & savings proposals.

	Lewisham Homes	Brockley PFI
No of representatives (excl Cllrs)	50	15
Rent Increase @ 7.0% Cap	See Below	See Below
Savings Proposals:-		
No Savings proposed	n/a	n/a
Service Charges inc:		
Heating & Hot Water Charges	See Below	See below
Garage Rents	See Below	See Below
Tenants Fund	n/a – no increase proposed	n/a – no increase proposed

Summary of comments made by representatives;

Brockley PFI

A transcript of the meeting, meeting minutes and comments received are contained at the end of this section.

There was further feedback from a drop-in session held on 7th December between 4pm to 7.00pm and additional comments from residents received by

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

RB3 up to and including 14th December 2022. This is also included at the end of this section.

Lewisham Homes

A transcript of the meetings and comments received are contained below.

We held a virtual event) for Lewisham Homes residents on the evening of Monday 12 December 2022, the meeting was held on zoom and attended by approximately 50 residents. Invitations were sent to all TRA's and the mailing list for all residents.

Comments received are below:

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

Lewisham Homes	<p>Rent increase: Representatives at the meeting queried why there is a 7% increase as opposed to the possible 5% at this time as there are issues of affordability</p> <p>Concern was also expressed that a wider audience should have the opportunity to consider the overall proposals and provide any comments that they may have on the proposed increases in all charges.</p> <p>Officers responded that it is a legal requirement that a balanced budget has to be set and that costs are increasing. It was confirmed that Housing Benefit would also increase in line with the proposed rent increase.</p> <p>In terms of invitees, there are a number of communications sent-out to inform tenants and tenant representatives that a meeting is being held, inviting them to attend.</p> <p>There were questions of value for money as charges are increasing but service delivery is not improving.</p> <p>Lewisham Homes requested attendees to contact them directly with specific service queries that they will note and respond to.</p> <p>Garage Charges: There was a discussion on affordability issues, as per the rent increase proposals.</p> <p>Residents enquired if there is to be any additional investment in the garage stock to bring them up to standard considering the rent increase proposals?</p> <p>Tenants Fund: n/a – no increase proposed</p>
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Rent setting and service charge meeting feedback (Lewisham Homes)

RENT and SERVICE CHARGES

Resident feedback

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- There is a lack of transparency and evidence on charges when you call/email. Lewisham Homes promised a new system that would provide detail but this has never happened.
- Lewisham Homes really do not communicate. These past few months are the most we've had but hardly with enough notice.
- We have a duty to pay our service charges etc but you want to come back to us about your financial challenges and reduction in services now yet we can't let you know about ours
- It's such a shame that when LH started it had so much promise but has failed us really badly causing so much stress, creating economic challenges and a level of disrespect to its client based the tenants and residents
- According to 3.1 of the service charge document, the tenants are subsidising the leaseholders.
- Leaseholders on our estate have to battle to get a LH to repair when damage caused from a problem with the fabric of the block ie not the responsibility of the leaseholder. In addition, the delay in anyone responding or doing anything becomes an issue when there's a time limit for the leaseholder to claim on their insurance (even though they shouldn't have to claim on their insurance).
- Will fly tipping / bulky waste costs be removed from our future bills when Lewisham Homes is abolished, as the council does this service for free?
- Lewisham seem to have no interest in claiming from leaseholders for damage they have caused to the fabric of the building or indeed the tenants property.
- Lack of transparency and lack of evidence of costs. This is the main theme running through everyone's complaint on here. LH should be able to be transparent at the point of contact in a timely manner not coming back to residents time and time again to no conclusion.
- Why doesn't the council audit and check on service standards? Can we trust LH to provide reports?
- Is it true that Lewisham Council has no money so have to acquire such monies from rents - the only proper income for councils and/or housing providers.
- Moving forward what figure are we going to agree upon - bearing in mind the testimonies from all your residents, it should be a 0% increase.

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- I feel the service charge should not be increased. My area has become so dirty and the people from Glendale only appeared at our blocks due to numerous complaints. The footpaths around our flats are never swept so why are we paying service charge every week. We also have serious mould & damp issues in our property which doesn't justify a rent increase. Lewisham homes have failed and should return services to the council
- My neighbour has been trying to sell for over a year but it simply won't sell because the estate is in such disrepair and scaffolding has been up for over 2 years.
- I'm a leaseholder with a top floor flat. Due to negligence- Not locking the access to the flat, kids went into the roof and crashed into my flat. Lewisham homes insurance team are refusing to sort out the repairs to my ceiling. It seems like they think I will give up.
- Lewisham Homes have failed to provide services adequately to meet basic needs
- The increase on this Service charge has to be reduced for obvious reasons: LH has not performed and you are increasing charges.
- I requested a more detailed breakdown for estimated charges which increased dramatically, and the actual charges were even more.
- I would negotiate for 5% initially with a 1% over the next five (5) years.
- Legal implications - infestations, window cleaning, no entry phones in our block - appears that LH are in breach of the Equality Act 2012.
- We've been promised an entry phone system for about two decades now.
- Can you show us the proof of purchase and expenses for work completed.
- It's always too complicated. Why over complicate when transparency is what is required
- We are continuing to be charged for a poor service and now expected to pay more for the same. A lot of the grounds maintenance and caretaking has actually been done by residents instead over the years.
- The reason major works will cost so much is because Lewisham Homes have neglected to do minor repairs and maintenance for years (easily 20+ years)

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- I have still not had an answer with regard to the caretaking provision for the building I live in, nor has the grounds maintenance occurred fortnightly as I am told it should be.
- LH gives you savings but the work is substandard with cheap materials and poor workmanship without an agreed standard that the council checks.
- Can Lewisham revisit the decision and cap at 5 rather than 7%
- There has definitely been a decline in services - especially in general caretaking etc
- Maintenance and repair standards are poor.
- We receive no caretaking provision and very little grounds maintenance even though it should be happening fortnightly
- The management of disrepairs is set up to stall and do nothing.
- I do not understand why Lewisham did not choose the 5% option rather than going straight to 7%

Lewisham Homes

We held a virtual event for Lewisham Homes leaseholders on Tuesday 6 December 2022, the meeting was held on zoom and attended by approximately 14 residents. Invitations were sent to all leasehold forum members.

Comments received are below:

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Lewisham Homes	<p>Service charge increase: Attendees stated: We don't mind paying an increase, but we want the services to be up to standard. We are paying for services, and we are not getting the level of service.</p> <p>My property is looking run down and neglected: two wooden bollards have broken and not been replaced. There is moss all over the carpark, the stairwell has paint peeling and the whole place looks rundown. Where is the investment?</p> <p>When we challenge costs through the Homeownership Team it takes too long to get a response. Can you turn things around quicker?</p> <p>Specific clarity on how much next year's actual service charges will be requested.</p> <p>As a leaseholder I am charged a proportion of the ACTUAL costs according to the cost to the whole block. This doesn't really seem to fit with the document, which suggests a regime where an average weekly charge is levied</p> <p>I understand an increase in costs but there is a disparity of services being delivered and the cost being charged. General maintenance not being delivered/kept up to standard e.g., Grass cutting/removal of weeds, cleared gutters, paintwork touch ups bollards not being replaced. It feels like the estates and blocks are being neglected</p> <p>Efficiencies should be looked at there is too much wastage. Use of LED lighting instead of fluorescent bulbs.</p>
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One comment was received on Garages:

I strongly disagree with any further increase in rent for the garages, until Lewisham Homes demonstrates some investments from the previous many increases in rent that we had. Residents have seen their garage rent almost doubling in just a few years with absolutely no further investment in the maintenance of the garages. It seems that the increased revenue from the garages is spent elsewhere. This is not in the residents' interests.

On Pepys Estate (where I live), garages have no electricity, this means that we can't easily use them in the evening and also we can't use small power tools (e.g., to vacuum the car). People with electric cars can't recharge them either on site. Our TRA years ago asked Lewisham Homes to have electricity installed in the garages.

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Comments from The meeting with Regenter B3 tenants and leaseholders is shown below:

We held a virtual event via Zoom for all residents in the Brockley PFI area on the evening of Monday 5th December 2022. All residents, which are both leaseholders and tenants, were texted or emailed to invite them to participate in this meeting. Invitations were also sent to all TRA's.

Approximately 46 residents responded to the invitation to attend, and they were sent the joining link. On the evening there were 21 residents on the meeting.

Comments received are below:

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London Borough of Lewisham Rent Proposal	<p>Rent increase: Representatives at the meeting queried why there is a 7% increase at this time as there are issues of affordability especially with the energy crisis.</p> <p>Concern was expressed that a wider audience should have the opportunity to consider the proposals and provide any comments.</p> <p>Officers responded that it is a legal requirement that a balanced budget must be set and that costs are increasing.</p> <p>RB3 had agreed that they would use a variety of ways to make this meeting and the drop in opportunity known to as many residents as possible. Posters were put up in block notice boards, texting to all whose details we hold as well as emailing invitation to residents to join the meeting. In terms of invitees, there are a number of communications sent-out to inform tenants and tenant representatives that a meeting is being held, inviting them to attend.</p> <p>There were questions of value for money as charges are increasing.</p> <p>RB3 requested attendees to contact them directly with specific service queries that they will note and respond to. Date of responses to be sent to Lewisham, via Pinnacle, by 14 December 2022. These comments are below.</p> <p>Garage Charges: There was a discussion on affordability issues, as per the rent increase proposals.</p> <p>Residents said they wanted to see the garage stock repaired.</p> <p>Tenants Fund: n/a – no increase proposed</p>
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Minutes of Regenter Brockley Resident Panel Meeting

Monday 5th December 2022
Meeting: 6.30pm - 8.00pm

1	Welcome & Introductions
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	<p>Pinnacle staff and Lewisham staff introduced themselves and their roles</p> <p>2 Residents introduced themselves</p> <p>Purpose of this meeting</p> <p>To discuss the proposals of increase to the rent and service charge for the tenants' rents, the tenant fund, the garage rents and the service charges.</p> <p>Lewisham Council Rent Proposal</p> <p>FB: The government carried out a rent consultation that concluded in November: Rents now capped at 7%. Lewisham's paper proposes rents at 7% which is an increase of @£7 per week for the average rent which takes it from £103 per week to £110.00 per week. The rent cap is for the year and don't know if it will extend next year.</p> <p>Date of responses to be sent to Lewisham by 14 December 2022</p> <p>TR: Feedback will go to the housing select committee.</p> <p>SH: Executive summary mentions a loss of £374 million pounds over a 30 year lifespan of the business as a justification for a rise. A 30-year forecast will not be accurate -may overstate the case and is not helpful. Can it be noted that it is based on a number of assumptions</p> <p>2.9 of the paper : an increase in rent and no direct efficiencies of savings have been considered for – would there not always be savings plan in place for any business for efficiencies of savings</p> <p>Statement: tackling housing crisis – this will add to it if rents go up</p> <p>UM: OK to increase rent and service charge but please match it with the repairs service in the building and increase the quality of repairs. Does not believe Lewisham does any control</p> <p>SS stated that she has contacted the office and someone has been out to see her.</p> <p>UM: Said that Pinnacle respond only when she complains to the Director of Rydon. Lewisham is not supervising Pinnacle.</p> <p>SS: Rydon is a different company. Emails are forwarded to Rydon when they have undertaken work, to enable them to respond directly to the resident.</p>
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	<p>FB: 30 Year forecast comment responded to by FB. It is broken down into 5 years and 20 years.</p> <p>Efficiencies and savings – TR will pick that up</p> <p>Section 3.1 – it is how the reports are framed</p> <p>TR: Obliged to have business plans that span 30 years, it is a government requirement and helps both the government and local authority plan for longer term issues, such as affordability. Critical guideline set is that Lewisham Council cannot fall into a deficit – it is illegal and they are monitored on that.</p> <p>They do forecast for medium – 5 year period and long term as well. We don't know what inflation will look like in a four or five years' time so on inflation Lewisham generally use the forecast in line with the Autumn statement.</p> <p>SH: States that the sum is given for 30 years and should show other years and variables and thinks that it is put in the report to cause alarm and to justify an increase.</p> <p>TR: The 374 million pounds has already been lost out of the business plan because it referred to the 4 years when there was a 1% deduction in rents for 4 years. It has already come off the rental income stream.</p> <p>Lewisham try and indicate what the future rent rises would look like so in 4.10 CPI is going to be 6% 2024/25, in 25/26 4%, and 2% the year after.</p> <p>FB: If UM has any concerns with Rydons she should use the complaints procedure and can also contact Lewisham Council complaints procedure.</p> <p>GW: His experience is that the complaints process is being manipulated to prevent people raising a complaint. He had an experience that it is not easy and still has an outstanding complaint. Can he meet with Lewisham Council about his complaint experience?</p> <p>FB: She will get back to him. ACTION POINT</p> <p>SO: SS mentions that any feedback from here goes back to the Council. Stated that last year she had refused to take the feedback to the Council and had to force her to take the feedback. He had to contact Fenella Beckman to complain because not many people had been consulted and he had to work very hard last year with</p>
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	<p>SR to contact residents on behalf of Pinnacle because Pinnacle would not do this. SS refused to accept the feedback and he had to complain.</p> <p>She was criticised for not telling the residents about this. This year it is the same and only the bare minimum has been done and he will be speaking to Fenella directly about this soon.</p> <p>He couldn't get to read the documents beforehand as they were sent out last minute and he has been too busy reaching out to the residents that SS did not reach out to. He has not received an agenda and the first time he has seen it is tonight, on the Zoom screen. He does not think that very much progress has been made this year. He wanted this recorded for the minutes.</p> <p>Allison: Agrees with SO and agrees with GW on the complaint's procedure. It isn't very clear. She has to email a number of times with no responses or very rude responses – residents can give up to challenge them as you don't get anywhere. Would like to speak to Lewisham directly to ensure they are not been fed a watered-down version as to what is going on.</p> <p>QUESTION: What is the reason why savings were not considered?</p> <p>TR: It is standard business practice that you do not put savings into any financial model because you cannot identify initially where they should be taken from. Have built in efficiencies in terms of when Lewisham lose stock through stock sales and demolitions. Efficiencies will have to be identified by Lewisham Homes and RB3. As the business plan is developed, then the savings will be brought in when they speak to the housing management providers.</p> <p>GW: Almost every business will do that as part of the modelling process. Can Lewisham do this?</p> <p>TR: We can do this, by liaising with the housing management providers and that takes time. Savings efficiencies will result in direct service reduction</p> <p>GW: Believes that you can't then use the 30-year business plan which is then not accurate.</p> <p>TR: Does not agree with this statement.</p> <p>IC: Expects that it will be going up because everything else is. It seems like Lewisham have opted for the maximum amount that they are legally allowed to charge and she believes that there are</p>
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	<p>efficiencies that can be made in the service that she is receiving at the moment to make it more efficient.</p> <p>Rents are capped at 7% however the Councils' costs are going up by a minimum of 10%. A deficit is in the HRA for next year which they are using the reserves to try and cover, because government has capped the local authority's ability to try and cover those costs.</p> <p>He cannot say that savings or efficiencies will come down the line when they get a clearer picture of what is happening in the next couple of years as the HRA obligations and the Council have to balance the books. It is increasingly becoming difficult to do this when there is high inflation, costs that they incur and a limited scope for increasing rents.</p> <p>EC: Would like TR to address why the leaseholders service charge is going up by 13.6% when the Councils' costs have increased by 10%.</p> <p>TR: 10% cost increase is an average. Lewisham has different contracts. RB3 contract is linked to RP1X which removes mortgage interest from the calculation and RP1X is higher than RPI or CPI. Therefore, if they want full cost recovery, then this will lead to a high increase, such as the one here at 13.6%.</p> <p>EC: Does not believe that it is fair to put a cap on some services and no other services.</p> <p>TR: Cap on rent was imposed by government. Lewisham has a choice for not going for full recovery, but in doing so, there would be a bigger deficit in the HRA which would have to be funded through efficiencies and better ways of working or direct cuts, which they would like to avoid.</p> <p>EC: Asked if the leaseholders are funding the gap in rents which are capped by the government</p> <p>TR: Leaseholders are not funding any cap. This is leaseholders and has nothing to do with the rents which is not related to the leasehold money. When they speak about leasehold, they talk about providing services to leaseholders and this is not linked to rents. They are separate charges.</p> <p>EC: Are the tenants service charges capped at 7%</p> <p>TR: No, they are not capped at 7%. They are going up at the same rate as leaseholders.</p>
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	<p>IC: There is CPI, RPI AND RPIX. Why have you used RPIX? It is higher because of mortgage costs.</p> <p>TR: The RB3 contract is linked to RPIX, which was signed in 2007.</p> <p>GW: What is in place if the contract is not been met to penalise Rydon. . The service is appalling. Need a contractor that can deliver value for money.</p> <p>TR: The Council are tied into this contract and it would be down to RB3 to make a decision about their contracts.</p> <p>GW: Are there any penalty clauses.</p>
4	<p>TR: There are penalty clauses</p> <p>GW: Can he have sight of the contract</p> <p>TR: Does not know the answer. Will defer</p> <p>GW wants this as an action point to get a copy of the contract</p> <hr/> <p>SS has responded to acknowledge receipt of this request. The document is commercially sensitive so the request will be taken back and you will be sent a response.</p> <p>Lewisham Council Garage Rent Proposal</p> <p>DL Manages garages. He is the Estates Manager at Lewisham Council, in the commercial team. They are normally increased by RPI each year It is currently 12.6% at the moment, but they've decided to cap it at 10%.</p> <p>There are almost 2.5k garages in the borough – most are Lewisham Homes. There are 311 in Brockley. Social tenants and leaseholders and non-resident with garages is approximately 70:30%.</p> <p>Large waiting list of almost 3.5k applicants for garages in the borough.</p> <p>The current average rent for a garage is 16.62 per week – covering a range from the highest at £25.00 and lowest is around £6.00. 50% discount across the board for blue badge holders.</p> <p>The proposed increase of 10% will put the average charge from £16.62 per week to £18.29 per week. A £1.66 per week increase.</p> <p>QUESTION: Is the use of garages for cars only or other uses?</p>

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	<p>RH All the garages are used for businesses. She has reported this</p> <p>DL: Garages can be used for storage and has to specifically state that if not being used for parking a motor vehicle. DL has noted RH statement that businesses are using the garages.</p> <p>SS: The garage complaints have been passed to the housing team. The garages are small for the average car and are increasingly being used for storage. Some have pots and pans in them as some people do catering and use it to store their equipment, as long as there are no gas appliances in there, they can use it for storage.</p> <p>RH: Has complained about a lady with a garage and she has asked for her garage to be taken away, and as she causes obstructions but nothing has happened. She believes vehicles should be used in garages or the terms and conditions should be changed. Sometimes they are used to fix cars.</p> <p>SS will remind the housing management team about the use of the garages.</p> <p>ACTION POINT</p> <p>RH: Said that she was surprised that there were no objections to this increase as they are making money from the businesses.</p> <p>KRIS: Sent in an email about Alder House that there is a parking problem which prevents her from using her garage.</p>
5	<p>SS: If an email has been received in the last week, she will receive a response</p> <p>KRIS will speak to SS separately. Also, someone has moved away and she thinks that their belongings should be removed from the garage.</p> <p>SS stated that not everyone that rents a garage live in the blocks. There is no requirement. There is a waiting list and people do not have to live in Lewisham to rent it.</p> <p>RH: 2 garages in Dunstan House are being used by people who do not live in Lewisham. She will send an email to SS.</p> <p>KRIS: Will write in about the resident next door who is preventing her from using her garage and she is concerned that she still has to pay for it although she cannot use it.</p>
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	<p>Lewisham Council Tenants Fund Proposal</p> <p>JL is the administrator of Lewisham's tenant fund. The fund provides grants to resident associations and TRA's in Lewisham to help them to make a positive difference to the neighbourhood. The 15p rent levy funds these grants and will remain at 15p for the next financial year. There are no plans to increase the levy.</p> <p>A: How does it work</p> <p>SS: It is collected as part of the rent</p> <p>JL: They have grants that they give out to TRA's so if the block that you live in is interested in forming a tenant resident association then please contact her. It has to be a credited association for the Lewisham Tenants fund to provide a grant.</p> <p>Pinnacle Service Charge Proposal for leaseholders and tenants</p> <p>SS explained the increase is 12.6% RPI plus 1% uplift which totals 13.6% for the new financial year. Every year at the beginning of April, there is an increase for grounds maintenance, caretaking, general repairs etc., to keep the estate running and to cover salaries and materials but the leaseholders get an adjustment 18 months later to reflect what the actual cost is. Some will have a debit and some will receive a credit.</p> <p>SH: Why do you use RPI? Is it not inaccurate?</p> <p>TR: It is used because Lewisham are tied into the contract at RP1X. When the contract expires, a new set of indices will be put in place. It is correct that most people are moving to CPI now instead of RPI. If they moved to CPI and it was 7% for example, the contract will still be increased by around 14%, there would still be an adjustment to pay because costs go up. Using RP1 PLUS 1% is close to what RP1X would come out to, using an inflationary increase. There would still be an adjustment. This process ensures that it is consistent.</p> <p>EC: Received an adjustment for last year, but no detail was attached. Can this be attached this year</p> <p>SS: The adjustments are sent out and if you need any further breakdown, then this will be sent out for Rydon's work. We can give information on the data we have – we cannot share caretaker's salary information but we can give you the salary increase percentage. We cannot predict what work will happen on</p>
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	<p>an estate, so we use the RPI increase. We provide an estimate. Section 20 Notices give the details of estimates if works cost more than £250 per person.</p> <p>EC: Is concerned with actuals.</p> <p>SS would like to be able to present a spreadsheet of repairs for all leaseholders but out of 600 leaseholders, only 8 or 9 leaseholders request it.</p> <p>EC: Can it not be sent out automatically?</p> <p>SS: It is not possible to send it out as it is a large spreadsheet so the information has to be extracted one by one.</p> <p>EC: She will be requesting a breakdown in the future. She had received one in the past and noticed that she was charged for the wrong block last time.</p> <p>SR: Is the increase in the service mandated in the contract with RB3 and you have no discretion.</p> <p>TR: No, that's not correct. The contract states that Lewisham have to inflate the contract by RPIX. Then Lewisham have to decide what the service charges will go up by. The contract cannot state what the indices would be as it wouldn't know. RB3's contract states that they should attempt full costs recovery which means that if we are aware that the contract is being increased by inflation then the proposals must reflect the contract increase. For example, if the contract is going up by 20%, for example then service charges will need to be increased by the same amount to ensure that Lewisham can maintain full costs recovery.</p> <p>SR: So, Regenter can increase their contract by RPI?</p> <p>TR: No, the contract terms and conditions state that the contract inflation to use is RPIX The Council has no discretion on that – they have to increase the contract by RPIX</p> <p>GW: So, where does the plus 1% come from?</p> <p>TR: RPIX takes out the mortgage interest payment. RPIX and RPI are not the same. RPI is lower than RPIX. So, what Lewisham have agreed with RB3 is that because RPIX is higher than RPI, Lewisham will use RP1 plus 1% to try and ensure that there is no gap between the contract price going up and the leasehold recovery</p>
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	<p>GW: Why don't you just say to them to use what is in the contract? Is it not your discretion</p> <p>TR: No, we cannot describe it as Lewisham discretion</p> <p>SR: Do the service charges for leaseholders in Lewisham Homes go up by RPI plus 1%</p> <p>TR: No, they do not use a formula like RPI or RPIX, they are not tied into a contract like RB3</p> <p>SR: So, we are paying more? Our increase is more than Lewisham Homes? Is that right as that was the situation last year</p> <p>TR: What you are forgetting is that Lewisham Homes leaseholders pay more than Brockley leaseholders for the services they receive so although your costs in inflationary terms are going up more than Lewisham Homes, your actual leasehold charge is lower than Lewisham Home residents.</p> <p>SR: There appears to be lack of evidence in the paper. I understand that leasehold costs have to be recovered. The costs are 'baked' in. I expect that some of the costs are people costs. Are the staff having a salary increase of 13.6%.</p> <p>TR: The local government pay deal has just been revealed, and some people will get inflationary increases in their salary. Inflation is high and the cost of living is high. Repairs are going up, material costs are going up by 12-15%, contract prices are going up at least an average of 10% and RB3's contract is probably going to go up in the region of 13-14%</p> <p>SR: Does not understand the justification for RPI plus 1%. She has a past paper from 2014 when service charge increased from RPI to 0.5%.</p> <p>TR said that there is discretion from the Council as there is no legislation that requires that certain things are done. Legislation states that you must endeavour to do full costs recovery and the Council have to do it the best way that they can.</p> <p>For example, If RB3 had told them that they would be putting up service charges by 6%, then the Council would ask then how does that balance with an increase in their costs of 10-20%. RB3 takes their contract money so if there is a shortfall, then the Council loses that money. They cannot fall into deficit. It would not balance with the contract</p>
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	<p>FB: Suggest that SS can put a bit more in the paper about how the costs were made up and that the Council can put a bit more in the paper about the breakdowns so people can understand what the different elements have.</p> <p>ACTION POINT : Lewisham to include more information in the paper about what costs are included</p> <p>SS: The leaseholds receive a cost breakdown annually for each leaseholder.</p> <p>UM: When does the contract end</p> <p>SS: 2027. Also, the money that is collected for service charges is paid directly to Lewisham Council and RB3 do not have the ability to deduct any money from Lewisham's bank account. When money is received, Lewisham then pay Regenter B3 their monies due as per the contract. RB3 cannot 'syphon' off any profits. Pinnacle do not touch any money.</p> <p>DL: Service charges are general – please explain the rubbish collection and pram sheds and can they have space for bike sheds.</p> <p>SS: Pram sheds are rented to residents and they have to pay extra for that If you would like a bike rack to be placed on your estate, then you will need to send in an email. Rubbish collections are included as bulk waste collection to ensure that the estate looks better. Anyone can ask for a bulk waste collection. Fly tipping is not collected and has to be reported to Lewisham Council and they deal with it.</p> <p>NW: Bulk waste is household items, not including fixtures and fittings up to the size of a double bed or double wardrobe. Flooring, internal doors or kitchen units would need to be paid for as a separate contractor that you organise for yourself. Fly tipping is different – if a non-resident were to dump a double bed or wardrobe outside the block, it would have to be collected because if it is left there it will be detrimental to the surroundings and increase the fly tipping in the area</p> <p>DL: Does not want to pay it. Thinks people should not do this.</p> <p>NW: If you want items to be removed, preferably with a photo and then send an email.</p> <p>GW: Concerned about the oversight and processing of the RB3 contract. Concerned about the quality of services that the repairs</p>
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	<p>team are providing. Is it based on KPI's or is there another method of auditing?</p> <p>TR: The housing strategy team do this but there is a suite of KPI's that are used.</p> <p>SS: The KPI's are set in the contract. Brockley provide the KPI's back to the Council on a monthly basis and is scrutinised. A strategic team look at performance and Pinnacle are penalised and if not met, then Pinnacle have to pay Lewisham back if targets not met.</p> <p>GW: Has the strategic housing team ever said that the KPI's are not accurate? The complaints do not seem to be registered as complaints and is a tricky process.</p> <p>FB: Lewisham do not just accept the KPI's. They visit RB3 and check the offices and check the files, and check the KPI's. They look at feedback to question if the information they are being given is correct. Lewisham challenges the KPI's.</p> <p>GW: Do you get access to emails?</p> <p>FB: Has access to complaints that have been raised. Erica is the Clienting Officer and goes into the offices and does walkabouts and will be making notes of the feedback that has been raised today.</p> <p>EC: Happy to pay more if there is an improvement in the service. She has weekly fly tipping and anti-social behaviour. Can anything be done to stop the fly tipping? Has not got a response to an email about fencing. Also, what is being done by improving the area by doing repairs? Major works were done and asked for double-glazed windows that she will pay for, but it was declined. She was told the windows had to be like for like.</p> <p>SS: You live in Lewisham Way, which is a conservation area so you couldn't have double-glazing. It is a question for Rydon. Monitoring of fly tipping in the area, it is reported to the Lewisham team. It is a crime so they try and identify who has done this. Putting up fencing is classed as an improvement and not a repair, because all Rydon do is to maintain the properties. Anything sent into the Brockley in-box is sent to the correct department. Lewisham can scrutinise that in-box and they can go through that in-box.</p> <p>Leaseholder will write in about improvements to Rydon and she will receive a response.</p>
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	<p>KRIS; Sometimes there is fly tipping and would like it monitored</p> <p>SR: They do not see Regenter at the Housing Select Committee talking about their annual report, like Lewisham Homes who talk about theirs.</p> <p>And not everyone has received an invite to this meeting, even though it has improved since last year. Putting up a notice in a notice board would be helpful.</p> <p>SS: Has confirmed that 14 December 2022 is the deadline to send in comments. Rydon do not need to attend as this meeting is about the increase.</p> <p>GW: Can there be an extension?</p> <p>TR: No, as Lewisham need time to collate the information for various reports.</p> <p>LF: If we have to pay the 13.6% increase, what can they push back on, e.g fly tipping</p> <p>SS: There are certain items that have to be in the service charges. Bulk waste collection is important.</p> <p>LF: If I can get away with dumping bulk waste, then he would.</p> <p>SS & TR: Tenants also pay for bulk waste collection</p> <p>NW: Council are responsible for general waste collection</p> <p>SM confirmed that with everyone's permission in the meeting, he will arrange for the recording to be uploaded onto the Regenter website</p> <p>ACTION POINT</p> <p>FB: Picked up comments on more time to come back due to the engagement exercise. There has been a huge improvement to the consultation last year. The results of the government consultation came out in November, and the Council only knew about the 7% increase recently and the papers were then done very quickly after that. This year posters have been erected to advertise the Consultation period and the papers were made available as soon as could be.</p> <p>QUESTION: The papers but there was no note to say that they there was a deadline for feedback. Will that be publicised?</p> <p>SM: Will upload to the website the deadline date to respond</p> <p>ACTION POINT</p>
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	<p>UM: Communication is a problem. When there is a complaint, they are pushed from pillar to post. Lewisham Council should monitor the complaints.</p> <p>She would like Lewisham Council to have a separate meeting with leaseholders.</p> <p>GW: Agrees with that suggestion</p> <p>IC: Thanked the panel for putting this on. She feels much more informed. She hopes going forward that this can be a more positive experience. Great communication and this meeting is a good step.</p> <p>Comment: Anxiety comes from lack of information but there has been improvement now that communication is better.</p> <p>RH: Front door enquiry. She received documentation about new fire doors being required. However she believes that leaseholders does not have to comply and that she feels that she will be financially penalised. She will send in a copy of the letter that she has received.</p> <p>SS: We have not told leaseholders that there will be a financial penalty if they do not comply. It is mandatory that the flat is made safe with a fire door. If a door is not replaced, then a conversation will take place and if leaseholders refuse then they will be asked to have another conversation.</p> <p>RH: Has objected to complying as she has two cats and has a cat flap.</p> <p>CF: Doors have been replaced in the past. He asked a question and is concerned that he has to spend £1,500 on a door now, when he has previously been asked to spend £10,000 on a replacement door and windows.</p> <p>SS will look into this. Also, if people are at the end of the balcony, then this will not be necessary to change the door. Everyone who has sent in their form will be contacted by a surveyor for a survey to take place.</p> <p>DL: Why are only future-proofing the doors to 30 minutes.</p> <p>SS: This is the legislation. Leaseholders can replace the door themselves.</p> <p>The recording will be put on the website. Please send any emails to the Brockley customer services. Thank you.</p>
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	Any Other Business
	None.

DRAFT

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**Brockley Rent and Service Charge increase proposals
Drop in session, Pinnacle Housing Office, 111 Endwell Rd
Wed 7th Dec 2022 4 – 7pm**

In attendance

Fenella Beckman – Director of Housing Services LBL

Tony Riordan – Senior HRA Accountant LBL

Erica Turner –Partnerships and Housing Contracts Mngr LBL

John Pedretti – General Manager RegenterB3

Five tenants and 2 leaseholders attend this session

Feedback from tenants who attended:

- Further clarity sought on how the increases are determined – explanation provided by LBL
- Further explanation requested on the rent increase cap at 7% - explanation provide by LBL
- Concerns raised that the rent cap could lead to a reduction in services
- Concerns raised around future contingency
- Acceptance of the increases for both the rent and service charges
- Some incidents of ASB were reported – strangers entering the blocks and urinating in lifts – request for installations of entry doors on blocks – concerns to be forwarded to Pinnacle
- Request for assistance to help set a tenant and resident's group with the view to improving communications and build a sense of community on the estate – request to be forwarded to Pinnacle.
- Query raised around timing of block decorations and painting of the blocks – follow up information to be provided by Regenter.

Feedback from leaseholders who attended:

- Concerned that increases are coming at worst possible time with cost of living crisis
- Increases don't result in any new or improved services
- Acceptance that increases have to happen
- Those that attended welcomed the opportunity to have a say in the proposals

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- Enquiry about purchase of freehold – LBL to investigate and provide follow up response

Additional Comments & Feedback was received from residents up to and including 14th December 2022, and is shown below

RENT

Resident feedback

No direct comments regarding rent increases as the majority of attendees were leaseholders

SERVICE CHARGES

Resident feedback

Below are the direct email comments received regarding the service charge increase:

I am not aware that an increase happens every year and I would be grateful if you could point me in the direction of the relevant section of the lease that states this. The ground rent has been at £10 per year since I became a leaseholder and the service charge has been between £900 and £1,100 since then as well – see below.

	Actual	Actual	Actual	Actual	<i>Estimated</i>
	2018/2019	2019/2020	2020/2021	2021/2022	2022/2023
Service Charge	£ 926.68	£ 1,024.23	£ 1,050.73	£ 988.30	£ 1,086.60
Ground Rent	£ 10.00	£ 10.00	£ 10.00	£ 10.00	£ 10.00

Thank you for sending the link to the reports on the website. I have reviewed the reports on the website and I do have concerns around the percentage increases given that these are related to inflation, which has been incredibly high recently. Given the rise in utility bills, council tax and food prices, I think that a cap would be beneficial as then residents would at least have some form certainty around what the increase could be.

I am particularly concerned around the 13.6% increase proposed for the service charge. Has any consideration been given to whether another service provider could be found that could provide better value for money?

Is the idea that these percentage increases would apply on yearly basis going forward for the rent and service charge? Cumulatively, these increase in costs could make being resident in Brockley very difficult.

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As per my previous email, is it possible to get a copy of the minutes of the Zoom meeting that took place on 5th December?

Where Lewisham Council and their contractors are refusing to communicate with residents this cannot be considered a consultation process.

I pointed this out at the meeting on December 5.

I also said I'm waiting for a response from Lewisham Council to questions from the Residents Panel of 17 December 2019. I insisted Lewisham contacted me. I have not yet heard from them. They must do this.

I was told Councillor Stephen Penfold was present. I pointed out I have spoken to him. He had taken my email address and said he'd get back to me but didn't. He said he'd never had any contact with me. I pointed out he was wrong to say that. I have not heard from him yet.

Lewisham Council councillors and officials and contractors must start responding to residents to prevent fraud and further "Appalling and Substandard work". The consultation process can then start.

Residents were given up until 14th December 2022 to share feedback following the above meeting.

I attach a collation of some resident's feedback here. There may of course be others from individuals or anything the current Panel Chair, TRA's or others may have provided.

Thank you

Brockley Service Charge Report 2023-24

- 1.2 – May Pinnacle confirm that this report and relevant documents was sent to all (700?) Brockley Resident Panels members at least a week before the meeting?
 - If the documents were not sent to all Panel members may Pinnacle confirm that it made ALL residents and panel members aware of that the documents were posted online?
 - How did Pinnacle ensure that residents / panel members without internet and email access received the information in time before the meeting?
- 1.2 – Is the 1% discretionary or part of the “uplift under RegenterB3 contract”? It has been applied for all years.
- 2 Policy Context – This huge increase (13.6%) in service charges will be detrimental to Corporate Strategy Objectives and may mean that a decent

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- home is not secure or affordable and may lead to an increase in homelessness.
- 2.3 – This paragraph refers to ensuring that tenants do not subsidise leaseholders but does not state the mechanisms in place to ensure that leaseholders do not subsidise tenants, the Council or are exploited by Pinnacle. Please state the mechanisms to ensure this.
 - 5.3 – the key principles for setting service charges do not refer to the levels of profits made by contractors. Why is this not a key principle?
 - How much profit did RegneterB3 contractors make in 2021-22? Without knowing this how can Lewisham Council and residents test if the contract delivers value for money?
 - The report does not stipulate or define value for money and how it is measured. What economic, efficiency, effectiveness and equity indicators are used to measure value for money?
 - 6.2 Leasehold Service Charges – Please provide the details to explain the massive difference between street properties (£86.22) and for blocks (£183.05)? Normally you would expect economies of scale reflecting more people living in blocks so costs are lower. Are the costs for blocks much higher due to ongoing neglect by service providers leading to more complaints?
 - Are the management charges for resident engagement and customer service the same for tenants and leaseholders in street properties and blocks? If not please explain why?
 - 6.3
 - Resident Involvement – Please explain what this includes and provide a breakdown of unit costs?
 - Customer Services – Please explain what this includes and provide a breakdown of unit costs?
 - General repairs and technical repairs – please define and explain the differences.
 - Management fee – Please explain what this includes and provide a breakdown of unit costs?
 - 8.3 – As per the above, at this stage not enough clear and defined information has been provided to ALL residents to explain the variations.
 - 8.4 – Is this supposed to be 2023-24?
 - 9 – Crime and disorder implications
 - Please confirm what this refers to? Does it mean that RegneterB3 contractors are not responsible for dealing with the impacts of crime and anti-social behaviour in the blocks they manage?
 - A huge price increase may lead to frustration and strains on families which may lead to crime and disorder implications. Why was this not considered?
 - 10 Equalities Implications – Why is Lewisham Council 20 years behind some third world countries on ensuring equality and equity in housing provision? Different residents have different needs. If you provided size 10 shoes to all children in a class that does not mean you have equally met their needs because some shoes may be too big/small so may only benefit

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some residents. What steps has Lewisham Council taken to ensure that the needs of the most vulnerable are met by this contract?

- 11 Environmental Implications – Why were no implications considered? There are implications.
- 12.1 – The customer service provision by Pinnacle has been poor for many years so the charges are not fair. How will the council ensure that the quality of customer service provision is improved?

Lewisham Council Dwelling Rents 2023/24

- 1 – The document states “residents are invited to consider this report” but as the Council knows from previous years, this document and the others have not been sent to all residents. There is uncertainty if Pinnacle sent the document or made it available to a panel members let alone all residents.
- 2.1 – What are the sources for these figures? Do they refer to Lewisham Council income or national?
- 2.9 states no direct efficiencies/savings are currently being considered. The Brockley Service Charge Report 2023-24 Para 5.3 states that one of the key principles for setting service charges is value for money. Is the Council confirming that Value for Money is not a key principle and no efforts will be made to improve the quality or quantity of services or to make any efforts to reduce costs for the same services?
 - The Council had a similar line for the 2022/23 charge increases. Please may the Council confirm what opportunities for cost reductions and efficiencies it identified and implemented for 2021/22 and 2022/23? Or is this just another generic Council line without any substance?
- 2.8 Garage rents – the focus of this paragraph is raising income for the council. Please state how this aligns to Pinnacle’s objectives for raising charges? Why don’t the objectives of the RegenterB3 contract align to the Councils?
 - The charge should be fair and be no more or less than the cost of providing the service
 - The charge can be easily explained
 - The charge represents value for money
 - The charging basis allocates costs fairly amongst those receiving the service
 - The charge to all residents living in a block will be the same
- 3 – How does raising charges help deliver Council objectives?
 - If Lewisham Council states there are no direct efficiencies or savings and there are no value for money indicators to assess effectiveness who does the Council measure that quality of homes has been improved?
 - How does increasing charges strengthen communities and embrace diversity? What baselines does the Council use to measure success / failure? What were the results from last year?
- 5 Efficiencies and savings proposals for 2023/24 – This contradicts the generic para 2.9.
 - Why is it ‘prudent’ to develop a model without savings identified? It’s the opposite of prudent and suggests value for money was an

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afterthought and the Council would set its own meaningless indicators to mark its own homework.

Inclusive Regeneration Estates Team Report (garage)

3 – How does raising garage rents help to build an inclusive local economy and make Lewisham greener? The actions will not help to deliver the objectives.

- Some residents may have garages for personal and not business purposes so there is no impact on the local economy.
- What are the green links? Most cars will not be electric. Will the Council prioritise electric cars for garage use?

9 – This section states that there are no specific (positive or negative) environmental considerations but the Council's objective is to make Lewisham Greener. Again the proposal does not match reality, objectives or the strategy. I appreciate your intention of inviting feedback on the increase in service charges for 2023/4 and that at least some attempt has been made at having different engagement methods.

Pay increases (even if in line with inflation) is wrong when you are a service provider whilst there is a cost of living crisis happening. I imagine most of your residents, in the diverse jobs they are in, aren't getting any pay increases in line with inflation. There should really be a freeze on pay increases for Regenter and new figures given. You cannot pass on that cost to your service users.

However, my concern is the frequent comments on the call on the 5th of December that, "although comments are welcomed, nothing can be done to change this decision".

Therefore, all my questions/comments are to be able to request more detail and context on charges, the process for any future increases and zooming out to the bigger picture:

Could you confirm the difference between Regenter/Pinnacle/Rydon and what their responsibilities are with regard to services provided to residents?

The constant feedback and messaging from residents is that the quality of service is pretty dire and so many residents have been providing negative feedback on service. If the service charge is being increased, surely a minimum level of quality assurance can be guaranteed or at least held to account alongside that. Please can you confirm the 1) official routes to provide feedback to Regenter and 2) the process Pinnacle has in place to manage actions on that feedback against the SLA with Regenter (i.e., Quality Assurance)?

What Quality Assurance metrics are already in place?
& to follow on from that, we need visibility on the collective resident feedback as well as actions taken by Regenter to provide a quality service from now on.
What is the best way to address this on an annual basis?

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Please can you also therefore share any recent examples of when Regenter have addressed any feedback by improving their services for Pinnacle Lewisham residents?

What happens when Regenter continually fail Quality Assurance or to deliver against the SLA? Is that a breach of contract?

When did RB3's Annual report last go before the housing select committee in open session? For the last two years it seems to have been provided as an "information only" briefing that was not published in the papers- whereas Lewisham Homes report was discussed in open session.

If we are unable to bring down the service charge increase, are we able to remove lines of work that can be agreed with the building to be removed from service charges? (for eg bulk waste removal?) In other words, are there any ways we can manage unnecessary costs to balance out the increase in service charge for residents?

For any costs outside of the Estimated Service Charge at the start of the year, what is the process to green light this from residents? How are we able to ensure a long-term view is kept with any services completed? (for example, many residents have complained about low quality, quick work that therefore needs to be redone more often than if investment has been made for higher quality, greener, and longer lasting work, therefore adding value for money.)

Given more time, we would have liked to also include specific results/actions required that we'd like to see alongside each of the comments which get submitted – i.e. lead you in the right direction. It was disappointing that Fanella Beckman (Director of Housing at the Council) just made vanilla responses with no actions in her reply letter last year.

There are other issues which seriously affected/effect resident's ability to respond, such as actively getting residents involved in these meetings, discussions and feedback, by reaching out and not depriving them or depending on a few residents to pass the information on because Regenter don't. Regenter can and should do far more. It wasn't in the Bugle. It wasn't mentioned at the last meeting. You were asked for an agenda but never provided one. It only went up on the Website much later and with far too short notice and as the Website is known to be months or years out of date, no-one would expect to see it or know where to find it. Notices on some blocks went up far too late and likely only in response to Facebook or some residents pressurising Regenter which occurred immediately beforehand. This year, it was a clever way to add a few last-minute items that could then be claimed to be improvements, when in fact nothing had changed except the response to pressure from residents last minute, and it seems the Council have bought it. The Council are in no way checking or verifying Regenters' obligations or year on year improvements on this, they are just accepting what is said by the Regenter propaganda machine.

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Fanella Beckman's response last year to significant concerns was also shocking, dismissive, belittling and highly suspicious and seems to be again this year.

I refer to the documented aspects of last year's closed meeting – a short notice system of highly limited discussion on rent, service charges and garage price increase. It lacked so much communication and outreach and invitation, despite being for all residents. Regenter first invited the Chair and Vice Chair to form a panel, then refused to allow a panel to attend, then created/invited their own and refused to disclose even who they were – with the Panel Chair! This was also mentioned in the meeting for which Fanella and other Council reps attended but remained silent, during and after. After more pressure, Regenter then agreed to provide time for residents to meet, discuss and create feedback and this was minuted. This was also rejected and the Chair had to complain to Fanella Beckman who accepted the document, but I am not sure if she took any action or said anything to Regenter. I would appreciate confirmation of any reprimand, sanction or other action taken against Regenter for this open and outrageous treatment and depriment to residents. The extent and audacity clearly show a deliberate attempt to stop feedback. The only response to this concern I got from Fanella was that... it should be better next year. I would like to see her give this pipsqueak of a response if in the presence of critics, residents, councillors and MPs, following all the shameful lead up just mentioned. I think this is a huge elephant in the room and I am calling it out, not least as Fanella Beckman tried a similar tactic in supporting Regenter at this years meeting. She declared that this year's communication and outreach and notice was much improved. It was not, though under duress from caring residents, a number of points/omissions were made and (coincidentally) immediately responded to. Any progress from last year was not voluntary or from their own choice or ideas, but being dragged from pressure from residents... again. Regenter are still not engaging with residents, not listening to residents, not actively or voluntarily reaching out, missing huge opportunities that have been raised many times and at meetings to progress, but never taken up.

It is hard to know where to take resident concerns when the most senior housing representative in the Council is impotent and at one with an organisation she should be looking at critically, listening to residents about and holding them (Regenter) to account, wielding some authority/incentives, without which, nothing is likely to improve.

<https://www.insidehousing.co.uk/news/news/a-third-of-social-housing-residents-struggling-with-debt-survey-finds-79328>

In this recent report, debt has skyrocketed in the last six months. Based on the number of residents Regenter have, hundreds and as many as 1,000 are in serious debt and struggling to pay their landlords and energy bills.

I submitted my comments separately,

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The questions below were not meant to be replied to by you Sandra. Had the correspondent read the email I sent, these questions were to give you all a heads up prior to the meeting of the issues I felt were pertinent to your submission to receive additional funding. For reasons unknown to me Sam decided to submit this as a customer service enquiry thing.... Totally pointless and another waste of everyone's time.

I am sorry I could not attend either the virtual or in person meetings but it became impossible due to other commitments.

I will point out that neither of my comments below were 'about' the smoke alarms, my point was very clear, it was about performance and I simply used two good examples of the complete an utter shambles that RB3 and Pinnacle have overseen. That you chose to concentrate on the words 'smoke alarm' at the expense of answering the actual claim says everything about every interaction I have had with your office, wilful avoidance of anything that might incur a degree of responsibility or humility.

My point about the layout of the charges was very simple, I don't pay weekly and I don't pay half the charges, send me a letter which is relevant to my charges so that I can comment with some degree of understanding rather than just guessing..... basically write better letters.

The letter says that customer engagement is a new charge, if you have been charging it for some time then why say its new, its not me who is confusing here.... basically write better letters.

Glad to hear the council will be seeing and judging the comments.

Whilst I understand inflation has increased and costs will inevitably increase my and others pay does not increase, certainly not inline with inflation. The best my work could manage was 3.5 percent this year and I think I'm one of the lucky ones.

Anything you can do to insulate us from these costs would be greatly appreciated.

To Whom It May Concern:

1.2 The service charges increased should be in line with a 5-year average. The years following, Brexit and COVID-19, including a war in Ukraine have resulted in a cost-of-living crisis, and the fastest rise in inflation in decades and increasingly rising interest rates. Using a snapshot of using the *September 2022 RPI (Retail Price Index)* of 12.6% plus 1% (*uplift under RegenterB3*

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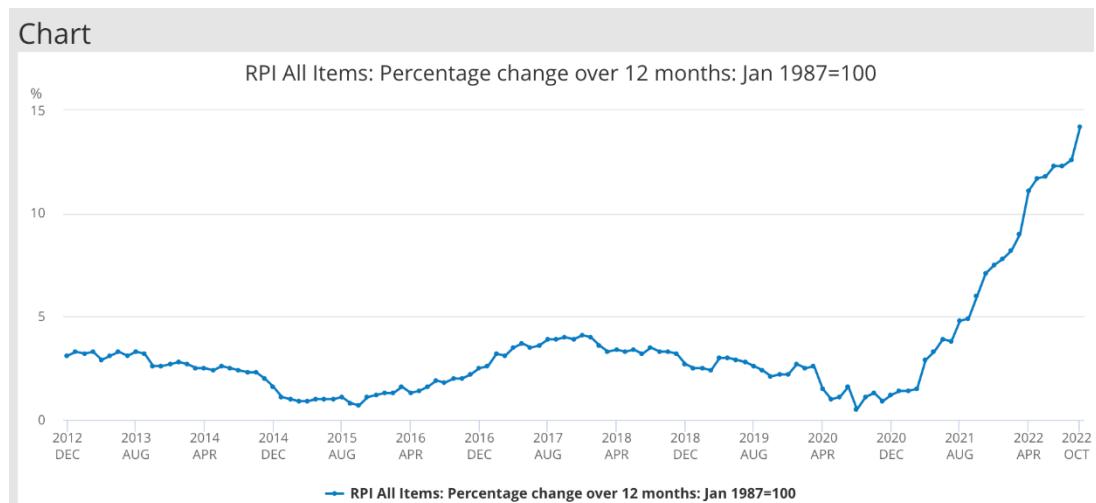
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(contract) making a total increase of 13.6% is unethical. Should the RPI fall next year the increases will be added to an already inflated service charge.

Below is a chart from the Office for National Statistics (ONS)

<https://www.ons.gov.uk/economy/inflationandpriceindices/timeseries/czbh/mmm23>



This shows the RPI over the last 10 years. The average is clearly below 5%. Using any percentage increased based on any measure over the last 12 months is not only misleading but applying this percentage increase *to the actual cost of each service element of the 2021/2022 figures* is opportunistic.

This percentage increase is also higher than “*the Consumer Prices Index including owner occupiers' housing costs (CPIH) [which] rose by 8.8% in the 12 months to September 2022*”. Source: ONS

2.1.1 Yew House in particular, has had many anti-social issues, including theft, fire and drugs. Pinnacle have failed for many years to make residents feel secure and these increases will certainly not be affordable. The residents have complained about these issues for years and the quality of service has been unsatisfactory.

In terms of the service charge increases I don't feel that its fair that its so much more than the % increase in the rent. I feel it should be the same and equal to the rent increases. I understand that you have put the maximum increase of 7% to the rents and stated it will be 13% increase on the service charge.

I am letting you know my views on this matter and feel it should be the same increase.

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Leases holders are already having to find the cost of the fire door, the works that have taken place plus the cost of pram shed fire doors.

I feel you need to relook at the plan again.

I saw the notice in Conifer House regarding the above meetings this weekend and I wanted to drop you a note.

The notice is the first I have heard of any proposed service charge and rent increases and I am very concerned that this is how it was communicated to residents and the incredibly short notice we were provided of the meetings (the meeting is due to take place on 5 December and the notice only went up on Friday 2 December in Conifer House). It makes it difficult for those of us who work or have childcare commitments to be able to make the meetings. I also find it concerning that we have not been given any prior details of what these proposed changes are ahead of the meeting.

Due to other commitments I am unable to make the zoom meeting but I would like to request a copy of the minutes. Please could you also provide me with further details of what these proposed changes are and any further opportunities there will be to provide you with feedback on this?

Please could I also request that any further communications regarding any changes to the service charge or ground rent are provided by way of letter or email to ensure all residents get a copy and that we are given more notice of meetings or to provide input/feedback?

I appreciate your intention of inviting feedback on the increase in service charges for 2023/4 and that at least some attempt has been made at having different engagement methods.

Pay increases (even if in line with inflation) is wrong when you are a service provider whilst there is a cost of living crisis happening. I imagine most of your residents, in the diverse jobs they are in, aren't getting any pay increases in line with inflation. There should really be a freeze on pay increases for Regenter and new figures given. You cannot pass on that cost to your service users.

However, my concern is the frequent comments on the call on the 5th of December that, "although comments are welcomed, nothing can be done to change this decision".

Therefore, all my questions/comments are to be able to request more detail and context on charges, the process for any future increases and zooming out to the bigger picture:

APPENDICES W1 to Z4 2023/24 BUDGET REPORT

1. Could you confirm the difference between Regenter/Pinnacle/Rydon and what their responsibilities are with regard to services provided to residents?
2. The constant feedback and messaging from residents is that the quality of service is pretty dire and so many residents have been providing negative feedback on service. If the service charge is being increased, surely a minimum level of quality assurance can be guaranteed or at least held to account alongside that. Please can you confirm the 1) official routes to provide feedback to Regenter and 2) the process Pinnacle has in place to manage actions on that feedback against the SLA with Regenter (i.e., Quality Assurance)?
3. What Quality Assurance metrics are already in place?
4. & to follow on from that, we need visibility on the collective resident feedback as well as actions taken by Regenter to provide a quality service from now on. What is the best way to address this on an annual basis?
5. Please can you also therefore share any recent examples of when Regenter have addressed any feedback by improving their services for Pinnacle Lewisham residents?
6. What happens when Regenter continually fail Quality Assurance or to deliver against the SLA? Is that a breach of contract?
7. When did RB3's Annual report last go before the housing select committee in open session? For the last two years it seems to have been provided as an "information only" briefing that was not published in the papers- whereas Lewisham Homes report was discussed in open session.
8. If we are unable to bring down the service charge increase, are we able to remove lines of work that can be agreed with the building to be removed from service charges? (for eg bulk waste removal?) In other words, are there any ways we can manage unnecessary costs to balance out the increase in service charge for residents?
9. For any costs outside of the Estimated Service Charge at the start of the year, what is the process to green light this from residents? How are we able to ensure a long-term view is kept with any services completed? (for eg, many residents have complained about low quality, quick work that therefore needs to be redone more often than if investment has been made for higher quality, greener, and longer lasting work, therefore adding value for money.)

Do let me know if you require any further information or clarification on any of the above points.

Hello, I have previously read through the rent and service charge increases for the future and I understand the information.

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Following the resident panel meeting of 5 December 2022, please find below my comments on the proposed rent and service charge increases for 2023-24. I would be grateful if you would acknowledge receipt of this email and the next steps as regards decision-making on these increases (eg when any paper is due to go to Committee and Cabinet, and how resident feedback is being taken forwards).

The below comments refer to the paper "Leasehold and Tenant Charges Proposal" available here [PUBLIC ACCOUNTS COMMITTEE / MAYOR AND CABINET \(squarespace.com\)](https://publicaccountscommittee.mayorandcabinet.squarespace.com)

- The increase of 13.6% on leasehold and tenant service charges appears to be based on an arbitrary formula (RPI + 1%) that is derived from a contract that Lewisham Council has signed with Regenter B3. There is no evidence provided in the paper that demonstrates that the cost to RB3 of providing these services to residents is going to increase by the rate 13.6%, and therefore there is no evidence to show that such an increase is justified. Instead, what it appears to show is that RB3 has a blank cheque to increase its charges to residents year on year at an above inflation rate, without ever being asked to evidence whether the costs of providing these services has increased at this rate.
- There is no explanation of whether the Council has discretion to depart from this formula of RPI + 1% (a question that has been repeatedly asked by residents but still remains unanswered), given the very real pressures that households are facing during the current cost of living crisis, or what (if any) options the Council or RB3 have considered to impose a lower increase on residents this year, taking into account the fact that many will be facing rising mortgage payments and other increasing costs in the year ahead. Where is the evidence that RB3 have attempted to find any efficiency savings to offset this above inflation increase in the service charge? Has it even been asked to do this?
- What residents like myself find particularly difficult to accept is that our service charge is increasing by ever larger amounts year on year, yet there is no commitment or expectation that the services we receive will improve. How can this be justified?
- Please explain the meaning of Para 12.2 of the paper. It states "The additional resources generated will relieve some of the current pressures within Housing Revenue Account and will contribute to the funding of the PFI contract which is contained within the authorities Housing Revenue Account." If the principle of the service charge is cost recovery, eg that residents should only pay for the cost of the services incurred, then what are the "additional resources" that this increase in the service charge is going to generate? Para 12.2 suggests that residents are somehow subsidising the costs of a PFI contract, and/or plugging a hole in the Housing Revenue Account - when in fact the service charge is exclusively going towards services like caretaking, grounds maintenance, etc. This must be explained further. Residents do

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not have a bottomless money pit to subsidise a PFI contract that the Council chose to enter. Are we being used to raise funds to pay for this contract?

GARAGES

Resident feedback

No comments solely about garage increase from residents

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APPENDIX X3: Leasehold and Tenants Charges 2023/24 Brockley

Committee	Brockley Residents Panel	Item No	
Report Title	Leasehold and Tenant Charges Proposal		
Contributor	Regenter Brockley Operations Manager		
Class	Proposal	Date	11 th November 2022

1 Summary

- 1.1 The report sets out proposals to increase service charges to ensure full cost recovery in line with Lewisham Council's budget strategy.
- 1.2 The report requests Brockley Residents Panel members to consider the proposals to increase the service charges for Leasehold and tenanted properties who are receiving the same service in the same block. The service charges will be increased in line with the September 2022 RPI (Retail Price Index) of 12.6% plus 1% (uplift under RegenterB3 contract) making a total increase of 13.6%. This percentage will be applied to the actual cost of each service element of the 2021/2022 figures. These costs have been audited and the actual cost of each service arrived at.

2 Policy Context

- 2.1 The contents of this report are consistent with the Council's policy framework. It supports the achievements of the Corporate Strategy objectives;
 - 2.1.1 Tackling the housing crises – Everyone has a decent home that is secure and affordable.
- 2.2 The contents of this report support the achievement of the following Housing Strategy 2020-26 objectives;
 - 2.2.1 Preventing Homelessness and meeting housing need.
- 2.3 The Council's Housing Revenue Account is a ring-fenced revenue account. The account is required to contain only those charges directly related to the management of the Council's Housing stock. This requires that leaseholder charges reflect the true cost of maintaining their properties where the provision of their lease allows. This prevents the situation occurring where tenants are subsidising the cost of leaseholders who have purchased their properties or leaseholders subsidising tenants in the same block.

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3. Recommendations

3.1 The Brockley Residents Panel is requested to consider and comment on the proposals contained in this report and the feedback will be presented to Mayor and Cabinet as part of the wider rent setting report.

4. Purpose

4.1 The purpose of the report is to:

- outline the proposals for increases in service charges in line with the contract arrangements for leaseholders and tenants to recover costs incurred for providing these services

5. Housing Revenue Account Charges

5.1 There are several charges made to residents which are not covered through rents. These charges are principally:

- Leasehold Service Charges
- Tenant Service Charges

5.2 A service charge levy is applied to Tenants for caretaking, grounds maintenance, communal lighting, bulk waste collection and window cleaning. Tenants also pay a Tenants Fund Levy which is passed onto the Tenants Fund as a grant.

5.3 The key principles that should be considered when setting service charges are that:

- The charge should be fair and be no more or less than the cost of providing the service
- The charge can be easily explained
- The charge represents value for money
- The charging basis allocates costs fairly amongst those receiving the service
- The charge to all residents living in a block will be the same

5.4 The principle of full cost recovery ensures that residents pay for services consumed and minimises any pressures in the Housing Revenue Account in providing these services. This is in line with the current budget strategy.

In the current economic environment, it must however be recognised that for some residents this may represent a significant financial strain. Those in receipt of housing benefit will receive housing benefit on increased service charges. Within Brockley PFI managed stock, there are approximately 177 tenants in receipt of Housing Benefits and 365

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tenants in receipt of Universal Credit. Those not eligible to claim benefits are offered private consultation with income collection team and welfare advice officers to discuss any financial difficulties they may have. These facilities are also offered to all residents.

6. Analysis of full cost recovery

- 6.1 The following section provides analysis on the impact on individuals of increasing charges to the level required to ensure full cost recovery. The tables indicate the overall level of increases.

6.2 Leasehold service charges

The basis of the leasehold management charge has been reviewed and externally audited this summer to reflect the actual cost of the service. The management charge now incorporates Resident Engagement and Customer Service charges which makes this combination £86.22 for street properties and £183.05 for blocks.

- 6.2.1 The following table sets out the current average weekly charge and the proposed increase for the current services provided by Regenter B3:

6.3 Leasehold service charges

Service	Leasehold No.	Actual Weekly Amount (End of Year 2021/2022)	Increase (13.6%)	weekly increase	New Weekly Amount at 13.6%
Caretaking	419	£3.35	13.60%	£0.46	£3.81
Grounds Maintenance	425	£1.93	13.60%	£0.26	£2.19
Communal Lighting	397	£0.12	13.60%	£0.02	£0.14
Bulk Waste	419	£1.29	13.60%	£0.18	£1.47
Window Cleaning	222	£0.02	13.60%	£0.00	£0.02
Resident Involvement	568	£0.25	13.60%	£0.03	£0.29
Customer Services	568	£0.41	13.60%	£0.06	£0.47
Ground Rent	568	£0.00	13.60%	£0.00	£0.00
General Repairs	568	£2.95	13.60%	£0.40	£3.35
Technical Repairs	401	£0.77	13.60%	£0.10	£0.87

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Entry Phone	140	£0.14	13.60%	£0.02	£0.16
Lift	237	£1.59	13.60%	£0.22	£1.81
Management Fee	568	£3.23	13.60%	£0.44	£3.67
Total		£16.06			£18.25

- 6.3.1 Tenant service charges were separated out from rent (unpooled) in 2003/04 and have been increased by inflation since then. RB3 took over the provision of the caretaking and grounds maintenance services in 2007/08. Both tenants and leaseholders pay caretaking, grounds maintenance, communal lighting, bulk waste collection and window cleaning service charges.
- 6.3.2 In addition, tenants pay a contribution of £0.15pw to the Lewisham Tenants Fund. At present there are no plans to increase the Tenants Fund charges.
- 6.3.3 As outlined in this report, the principle to be applied to service charges is that full cost recovery should be maintained wherever possible. The service charge increase applied for 2023/24 will be set in November 2022 to be applied from 1st April 2023. Pinnacle review service charges on a regular basis to ensure they are appropriately set and will continue to do so.
- 6.3.4 The data in the table for tenants have been calculated to reflect the charge applied for inflation as allowed for within the contract at a rate of 13.6% (September 2022 RPI of 12.6% + 1.0%) Overall, charges are suggested to be increased by an average of 93pence per week which would move the current average weekly charge from £6.86 to £7.79.
- 6.3.5 The increases have also been applied to the tenant service charges and are shown in the table below

Service	Current Weekly Charge based on the Actuals for 2021/22	Increase (13.6%)	weekly increase	New Weekly Amount at 13.6%
Caretaking	£3.35	13.60%	0.46	£3.81

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Grounds Maintenance	£1.93	13.60%	0.26	£2.19
Communal Lighting	£0.12	13.60%	0.02	£0.14
Bulk Waste	£1.29	13.60%	0.18	£1.47
Window Cleaning	£0.02	13.60%	0.00	£0.02
Tenants fund	0.15	13.60%	0.02	£0.17
Total	£6.86			£7.79

- 6.3.6 The RB3 Resident Panel is asked for their views on these charges from April 2023 to March 2024. Results of the discussion will be presented to Mayor and Cabinet for approval in December 2021.

7. Financial implications

The main financial implications are set out in the body of the report.

8. Legal implications

- 8.1. Section 24 of the Housing Act 1985 provides that a local housing authority may make such reasonable charges as they determine for the tenancy or occupation of their houses. The Authority must review rents from time to time and make such changes as circumstances require. Within this discretion there is no one lawful option and any reasonable option may be looked at. The consequences of each option must be explained fully so that Members understand the implications of their decisions.
- 8.2. Section 76 of the Local Government and Housing Act 1989 provides that local housing authorities are under a duty to prevent a debit balance in the HRA. Rents must therefore be set to avoid such a debit.
- 8.3. Section 103 of the Housing Act 1985 sets out the terms under which secure tenancies may be varied. This requires:-
- the Council to serve a Notice of Variation at least 4 weeks before the effective date.
 - the provision of enough information to explain the variation.

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- an opportunity for the tenant to serve a Notice to Quit terminating their tenancy.
- 8.4 The timetable for the consideration of the 2022/23 rent levels provides an adequate period to ensure that legislative requirements are met.
- 8.5 Part III of Schedule 4 of the Local Government and Housing Act 1989 provides that where benefits or amenities arising out of the exercise of a Housing Authority's functions, are provided for persons housed by the authority, but are shared by the community, the authority shall make such contribution to their HRA from their other revenue accounts to properly reflect the community's share of the benefits or amenities.
- 8.6 Whereas an outcome of the rent setting process, there are to be significant changes in housing management practice or policy, further consultation may be required with the tenants affected in accordance with section 105 of the Housing Act 1985.

9. Crime and disorder implications

There are no specific crime and disorder implications in respect of this report paragraph.

10. Equalities implications

The general principle of ensuring that residents pay the same charge for the same service is promoting the principle that services are provided to residents in a fair and equal manner.

11. Environmental implications

There are no specific environmental implications in respect of this report.

12. Conclusion

- 12.1 Revising the level of charges ensures that the charges are fair, and residents are paying for the services they use.
- 12.2 The additional resources generated will relieve some of the current pressures within Housing Revenue Account and will contribute to the funding of the PFI contract which is contained within the authorities Housing Revenue Account.
- 12.3 Though the increased cost of living and the energy crisis has pushed the retail price index figures into double figures this year. The audit of actual costs once completed, will ensure that any necessary adjustments are undertaken to ensure full cost recovery.

If you require any further information on this report, please contact

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Kenneth Gill
Area Manager
or
Sandra Simpson
Project Manager

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Or

on 0204 518 1447

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

APPENDIX X4: Leasehold and Tenants Charges 2023/24 Lewisham Homes

Meeting	TRA Chairs Meeting	Item No.	x
Report Title	Service Charges 2023/24		
Report Of	Director of Finance and Technology - Rowann Limond		
Class	Information	Date	12 December 2022

1. Purpose of the Report

- 1.1 This report sets out proposals for resident's service charges in 2023/24. Residents are invited to comment on the proposals which will be fed back to the Mayor and Cabinet as part of the Council's budget setting process.

2. Recommendations

- 2.1 To consult residents on the service charge proposals and provide feedback to the Mayor and Cabinet.

3. Background of the Report

- 3.1 The Council's Housing Revenue Account is a ring-fenced account. The account can only contain those charges directly related to the management of the Council's housing stock. By implication leaseholders must be charged the true cost of maintaining their properties, where the provision of their lease allows. This prevents tenants subsidising the cost to leaseholders, who have purchased their properties.
- 3.2 Each year a review of the actual costs is undertaken as part of the budget setting process and recommendations made to the council in respect of proposed charges.
- 3.3 The 2023/24 service charges have been set against a backdrop of high inflation and a cost-of-living crisis. Service charges should be based on actual costs but following comparison against the 2021/22 actual costs it has been decided to cap the increase to the service charges at 7% as the increase would need to be significantly higher if the weekly charge was to recover the actual costs incurred.
- 3.4 It is acknowledged the current cost of living increase is significantly affecting Tenants and Leaseholders. Lewisham Homes empathises with all residents about the difficult choices that are having to be made and has done its very best to keep the proposed increase at an absolute minimum.
- 3.5 It is important to note the actual services charge costs incurred exceed the amount recovered. In future years it may be the policy to recover service charges closer to the actual costs incurred.

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4 Tenant and Leasehold service charges 2023/24

- 4.1 The proposed 2023/24 charges as compared with 2022/23 are shown in Appendix 1
- 4.2 The proposed charges for 2023/24 have been aligned, as much as possible, to the 2021/22 actual service charges. Adjustments have been made where the actual costs include exceptional items and have caused a spike in the rolling average for these costs. This is particularly the case for caretaking, building repairs and maintenance.
- 4.3 The total proposed service charges have increased from £37.18 per week to £39.50, an increase of 7.0%. This increase has been driven by inflationary increases to costs. In particular there has been a 10% cost of living increase to caretaking staff costs, which has directly affected the costs of caretaking, grounds maintenance and sweeping,
- 4.4 There have been increases in transport costs due to increases in fuel. This has also contributed to cost increases across a number of service charge headings.
- 4.5 There has been a decrease in service charges for window cleaning and pest control due to costs for 2021/22 being lower than estimated.
- 4.6 A proposed increase in communal heating and communal lighting of £0.18 and £0.53 per week respectively is due to an increase in energy costs.

If you require further information on this report please contact Rowann Limond
(rowann.limond@lewishamhomes.org.uk)

Appendix 1

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Existing Service	Tenant (T) / Leaseholders (LH)	2022/23		2023/24			
		Weekly Charge	Estimate 2022/23	Weekly Charge	Estimate 2023/24	Increase from 22/23	
		£	£	£	£	%	
Caretaking	T & LH	6.76	4,560,283.05	7.44	5,016,311.35	10%	
Ground Maintenance	T & LH	2.20	1,870,031.07	2.20	1,870,031.07	0%	
Repairs and Maintenance - Building	LH	3.28	854,174.95	3.51	913,967.19	7%	
Repairs and Maintenance Technical	LH	1.13	273,415.53	1.25	300,757.08	10%	
Lifts	LH	1.77	90,033.51	1.83	99,036.86	10%	
Entry Phone	LH	0.51	34,452.63	0.76	51,678.95	50%	
Block Pest Control	T & LH	2.10	197,112.86	1.75	164,238.00	-17%	
Ground Rent	LH	0.19	50,550.00	0.20	54,088.50	7%	
Sweeping	LH	1.08	220,016.84	1.26	235,418.02	7%	
Management	LH	2.70	706,522.92	2.89	755,979.53	7%	
Window Cleaning	T & LH	0.12	46,593.20	0.09	33,822.00	-27%	
Bulky House Hold Waste Collection Service	T & LH	0.58	363,058.00	0.72	388,472.06	7%	
Bulk Waste Disposal	T & LH	0.88	566,915.10	0.95	606,599.16	7%	
Insurance	LH	1.14	300,237.58	1.22	321,254.21	7%	
Total excluding energy charges		24.47	10,133,397.25	26.08	10,811,653.98	7%	
Communal Lighting	T & LH	1.20	690,306.47	1.39	738,627.93	7%	
Communal Heating and Hot Water	T & LH	11.50	880,462.96	12.04	921,238.50	5%	
Total energy charges		12.71	1,570,769.43	13.43	1,659,866.43	6%	
Grand Total		37.18	11,704,166.68	39.50	12,471,520.41	7%	

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APPENDIX X5: Garage Rent Increase Report 2023/24

INCLUSIVE REGENERATION Estates Team Report		
Report Title	Rental Increases for Garages from April 2023 – Lewisham Homes and Regenter RB3	
Key Decision	Yes	Item No.
Contributors	Directorate of Housing, Regeneration and Public Realm	
Class		Date: November 2022

1. Purpose and Summary of the report

The purpose of this report is to advise the resident panel of the proposed increase in the rent paid by tenants for domestic garages owned by the Council for the next financial year. For the past few years, the garage rents have been increased in line with the Retail Prices Index, which currently stands at 12.6%. However, due to the current cost of living crisis and economic uncertainty, it has been decided to cap the increase at 10% for the next financial year.

2. Recommendation

It is recommended that the Council approves, in principle, an increase in rent for the garage portfolio of 10%, to be effective from April 2023. This increase is 2.6% less than the Retail Price Index for the current year.

Blue Badge holders will continue to receive a 50% deduction on the weekly rent.

3. Policy Context

The contents of this report are consistent with the Council's policy framework. It supports the achievements of the following corporate strategy objectives:

- Building an inclusive local economy – Everyone can access high-quality job opportunities, with decent pay and security in our thriving and inclusive local economy.
- Making Lewisham greener – Everyone enjoys our green spaces and benefits from a healthy environment as we work to protect and improve our local environment.

4. Background

For the forthcoming financial year from April 2023 it is intended that the increase applied is capped at 10%, which is 2.6% less than the Retail Prices Index.

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There are approximately 134 Council garage sites in the borough, comprising 182 garage blocks. There are 2,379 garages in total, which are split 2,011 to Lewisham Homes, 311 Brockley Regenter and 57 TMO's. The split between social tenants/ leaseholders and non-residential tenants is approximately 70%/30%

The current waiting list for Lewisham Homes garages is 3,426 applicants.

A housing tenant with LB Lewisham pays the basic price for a garage (subject to any specific discounts agreed) and a non-housing tenant pays the basic price with the addition of 20% VAT. Blue Badge holders receive a 50% deduction on the weekly rent.

The application of a discount is entirely a discretionary decision on behalf of the Council; garages are not a core social dwelling provision and all could be charged at a higher level, although there is some logic in offering some abatement to housing customers to help mitigate parking issues and neighbourhood management problems.

The current average basic rent charge (before discounts) for the garage stock is £16.62 per week. The highest rent charged is £24.90 per week and the lowest is £6.15 per week. However, some garages are charged at less than the lowest rate per week. These are discounted rates (50% of the full charge) for tenants with blue badges.

5. Financial Implications

The current annual rent roll for the garage portfolio is £2.056M, based on a basic average standard charge of £16.62 per week per garage (i.e. before discounts are applied).

If the rents are increased by 10%, as proposed, in April 2023, the revised annual rent roll will increase to approximately £2.262M, or from £16.62 per week to £18.29 per week per garage, an uplift of £1.66 per week on average, and a total increase of approximately £191,000 on the annual rent roll, or £151,000 after blue badge holder discounts have been applied.

6. Legal Implications

The Council's duties in relation to the consultation of tenants on matters of housing management, as set-out in Section 105 of the Housing Act 1985, do not apply to rent levels, nor to charges for services or facilities provided by the authority. There is therefore no requirement to consult with secure tenants regarding the proposed increase in charges. The Council still needs to act reasonably and the decision maker should therefore be satisfied that the increase is reasonable and justified. The general principle is that the Council should be seeking best value.

The Equality Act 2012 (the Act) introduced a new public sector equality duty (the equality duty or the duty). It 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.

In summary, the Council must, in the exercise of its functions, have due regard to the need to:

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- 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.

The 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.

The Equality and Human Rights Commission has recently issued Technical Guidance on the Public Sector Equality Duty and statutory guidance entitled “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: <http://www.equalityhumanrights.com/legal-and-policy/equality-act/equality-actcodes-of-practice-and-technical-guidance/>

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
- Equality objectives and the equality duty
- Equality information and the equality duty

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/>

7. Crime and Disorder Implications

There are no specific crime and disorder implications in this report. However, levels of voids could increase in the future if there is a lack of investment. Poorly maintained garages with high vacancy rates can in turn lead to increased levels of crime and anti-social behaviour.

8. Equalities Implications

The proposed 10% increase will be applied across the portfolio to residents and non-residents. Blue badge holders will continue to receive a 50% discount on the weekly rent as existing.

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9. Environmental Implications

There are no specific environmental implications in this report.

10. Conclusion

The proposed rental increase is considered to reflect market rent and be sustainable, and will raise additional revenue from the portfolio of approximately £xxx191,000, or £151,000 net after blue badge discounts have been applied.

11. Further Information

If there are any queries on this report, please contact David Lee on mobile 07392 862107, david.lee@lewisham.gov.uk

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

APPENDIX X6: Other Associated Housing Charges for 2023/24

Garage Rents

1. The detail of these charges and the changes are as set out in appendix 5. The proposals is for a 10.0% increase in charges which equates to an average increase of £1.66 per week.

Tenants Levy

2. As part of the budget and rent setting proposals for 2005/6, a sum of £0.13 per week was ‘unpooled’ from rent as a tenants service charge in respect of the Lewisham Tenants Fund. The current charge is £0.15pw.
3. No proposals have been put forward by Lewisham Tenants Fund (LTF) to vary this levy for 2022/23. Therefore the charge will remain at £0.15pw for 2022/23.

Hostel charges

4. Hostel accommodation charges are set based on current Government requirements and will increase by 7.00% (£2.63 per week).
5. Hostel service charges are set to achieve full cost recovery, following the implementation of self-financing. For 2023/24, the charge for Caretaking/management and Grounds Maintenance will increase by 6.31%. This will increase the average charge from £72.96 to £77.56 per unit per week.
6. In addition, the charge for Heat, Light & Power will be increased by 20% and move the average charge from £5.98pw to £7.17pw. Water charges will increase by 5% and will move the average charge from £0.20pw to £0.21pw. The charge for Council Tax will be based on the total recharged received from Council Tax section. All charges will be based on the total number of hostel units and is forecast to increase by 3% 2023/24.
7. Hostel residents were consulted on these proposals via individual letters. Officers also invited hostel residents to meet them to discuss the changes and how these may affect them. However, no comments or representations were received.

Linkline Charges

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8. The delivery of the service to a ‘full visiting service’ to better reflect service need was implemented in 2018/19. The current annual charge to the HRA for 2022/23 is £435k. Current indications are that an inflationary increase of 2.0% will be applied for 2023/24, increasing the HRA charge by £9k (to £444k for 2023/24). The current linkline charge to HRA residents is £6.26 per week, and does not fully recover the full charge applied to the HRA.
9. Consultation with HRA residents/current users of the service is due to be undertaken sometime in the New Year. The results of any consultation will be reported to Mayor and Cabinet. Consultation would need to be completed by mid-February 2023 to comply with the 28 day statutory notice of charge increases and allow increased charges to be applied from April 2023. However, if consultation is delayed, the charge increase can only be applied from April 2024. There are no proposals to increase the maintenance charge, which will remain at £0.94 per week.

Private Sector Leasing (PSL & PMA)

10. Rent income for properties used in the Private Sector Leasing (PSL) and Privately Managed Accommodation (PMA) scheme are General Fund resources. From April 2021, rents for homes let under these schemes will be charged at the applicable Local Housing Allowance (LHA) for private rented sector (PRS) properties. This will support the schemes to remain viable in the longer-term and reduce the General Fund subsidy that is presently required to keep them in operation.

Heating & Hot Water Charges

11. As part of last year’s rent setting process the Mayor agreed to continue with the current formula methodology for calculating increases in Heating & Hot Water charges to tenants and leaseholders. This formula was originally approved by Mayor & Cabinet in December 2004.
12. The current charging methodology allows a limited inflationary price increase plus a maximum of £2 per week per property increase on the previous year’s charge. Consumption levels are also updated and included in the formula calculation.
13. The existing corporate contract for the supply of electricity is let by the property services team with Crown Commercial Services; an Executive Agency of the Cabinet Office. The contract frameworks have been designed to comply with the findings of the Pan Government Energy

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Project, which recommends that all public sector organisations adopt aggregated, flexible and risk-managed energy procurement with public sector buying organisations.

14. The proposal for 2023/24 is for an increase of £0.54pw or 5.0%. This will move the current charge from £11.50pw to £12.04pw. This is based on the latest available unit rates and consumption data.
15. The proposal for communal lighting is for an increase of 7.0% or £0.19 per week. This will move the current average charge from £1.20pw to £1.39pw. The increase is due to updated unit rates and consumption rates.
16. Officers will review the costs, actual energy usage and new contact prices in both 2022/23 and 2023/24 as part of the monitoring regime. Once the new long-term energy supply contracts are in place, recommendations for changes to charges will be brought forward as part of the 2024/25 budget process.

APPENDICES W1 to Z4 2023/24 BUDGET REPORT

APPENDIX Y1 2023/24 Budget Reductions – approved December 2020, February 2021 and 2 February 2022

Ref	Proposal	2022/23 £'000	2023/24 £'000	2024/25 £'000	TOTAL
Theme A - Productivity					
A-01	Staff productivity - arising from new ways of working (including learning from the Covid 19 pandemic), better collaboration and a return on IT investment	3,000	0	0	3,000
A-02	Hybrid roles - enforcement	50	50	0	100
A-03	Corporate Transport arrangements	150	50	0	200
A-04	Process automation in Revs and Bens	100	0	0	100
A-06	Revs and Bens - Generic roles	400	0	0	400
Total for Theme A - Productivity		3,700	100	100	3,800
Theme B – Joint working					
B-02	Strategic recharging	600	0	0	600
B-06	Cuts to the main grants programme	800	0	0	800
B-07	Review of Council run events	30	0	0	30
B-10	Reduction in local assemblies service	178	0	0	178
Total for Theme B – Joint working		1,608	0	0	1,608
Theme C – Service Reconfiguration					
C-02	Adult Learning and Day Opportunities	100	0	0	100
C-03	Reduction in the use of agency social workers.	215	0	0	215
C-07	Review Short breaks provision.	50	50	0	100
C-08	IT - mobile telephony review	10	10	0	20
C-10	Housing Services Review	300	0	0	300
C-17	Re-configuration of MH Supported Housing pay – Social Interest Group	150	0	0	150
C-28	Supported Housing Services	84	0	0	84
Total for Theme C – Service Reconfiguration		909	60	0	969
Theme D – Asset Realisation					
D-01	Generating greater value from Lewisham's asset base	0	500	0	500
D-02	Business Rates Revaluation for the estate	40	20	0	60
D-05	Savings on mothballed assets. A review is in progresses - savings on the cost of running the operational estate	50	0	0	50
D-06	Catford Campus - Estate Consolidation	11	12	0	23
D-07	Meanwhile use - Temporary Accommodation	25	25	0	50
D-08	Miscellaneous - income generation	25	0	0	25
Total for Theme D – Asset Realisation		151	557	0	708
Theme E – Commercial Approach					
E-01	Improved Debt collection	250	0	0	250
E-02	Income from building control	15	20	0	35
E-05	Traded services with schools	50	0	0	50
E-06	Reduce care leaver costs	100	0	0	100

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E-07	Housing – Increased rent for Private Sector Lease (PSL) and Private Managed Accommodation (PMA)	375	0	0	375
E-09	Realising further benefits from the Oracle Cloud Solution and exploiting its functionality as a fully integrated enterprise resource planning solution.	100	0	0	100
Total for Theme E – Commercial Approach	890	20	0	910	
Theme F – Demand Management					
F-02	Children Social Care Demand management	500	1,000	0	1,500
F-03	Children Service reconfiguration - fostering	250	250	0	500
F-05	VfM commissioning and contract management - CSC	250	0	0	250
F-15	Environment - environmental operations review	330	0	0	330
F-15a	Environment - environmental operations review	567	0	0	567
F-16	Environment - new waste strategy	0	250	0	250
F-17	Road safety enforcement	250	0	0	250
F-20	Emission based charging for Short Stay Parking	120	0	0	120
F-18	Controlled Parking Zone Extension	0	1,000	0	1,000
F-21	Road Safety Enforcement	375	0	0	375
F-22	Motorcycle parking charges	80	0	0	80
F-24	Adult Social Care cost reduction and service improvement programme	430	0	0	430
Total for Theme F – Demand Management	3,152	2,500	0	5,652	
GRAND TOTAL	10,410	3,237	0	13,647	

Ref	Proposal	2022/23£ £'000	2023/24 £'000	2024/25 £'000	Total £'000
Theme C – Service Design					
C-35	Specialist social care support review	177	0	0	177
C-36	Reduction of commissioned care leaver housing costs	600	0	0	600
C-38	Strategic development team cost capitalisation	100	0	0	100
C-39	Aligning the Kickstart scheme with Government plans	25	25	0	50
C-40	Substance misuse – contract review and staffing	92	0	0	92
C-44	Removal of graffiti from private property	5	0	0	5
Total for Theme C – Service Design	999	25	0	1,024	
Theme D – Asset Optimisation					
D-10	Commercial Estate Review	0	50	100	150
D-11	Business Rates revaluation of Council owned properties	100	50	0	150
D-12	Asset Use Review and Regularisation	0	15	85	100
D-13	Review of commercial opportunities for nurseries within children's centres	11	9	0	20

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

D-14	Facilities Management	0	100	10	110
Total for Theme D – Asset Optimisation		111	224	195	530
Theme E – Commercial Approach					
E-12	Building Control Service Efficiency	20	30	0	50
E-14	Changes to leisure concessions for older people	95	95	0	190
E-15	Seek corporate sponsorship for Festive Lighting	30	0	0	30
Total for Theme E – Commercial Approach		145	125	0	270
Theme F – Demand Management					
F-25	Road Safety – new yellow boxes	150	0	0	150
F-26	Subscriptions	20	0	0	20
Total for Theme F – Demand Management		170	0	0	170
GRAND TOTAL		1,425	374	195	1,994

Total previously agreed savings				
GRAND TOTAL		11,835	3,611	195

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

APPENDIX Y2 2023/24 Budget Reductions – 7 December 2022

Member Decisions

Reference	D'torate	Proposal	2023/24 £'000	2024/25 £'000	2025/26 £'000	Total
HRPR_INC_01	HRPR	Additional Yellow Box Junction Enforcement & Moving Traffic Contravention by CCTV	105	295	-100	300
HRPR_INC_02	HRPR	Replacement Bin Charging	50	-25		25
HRPR_INC_03	HRPR	Increase the charge for Bulky Waste collections	20	-	-	20
HRPR_INC_04	HRPR	Charge for mattress collections	25	-	-	25
HRPR_INC_05	HRPR	Increase the charge for fridge/freezer collections.	78	-	-	78
HRPR_INC_06	HRPR	Review of fees charged for Garages	130	70	50	250
HRPR_SAV_01	HRPR	Temporary Accommodation Cost Reduction	200	300	500	1000
HRPR_SAV_02	HRPR	Road Safety Service Review	70	70		140
COM_SAV_08	COM	Reduction in opening hours at Libraries	90	-	-	90
COR_INC_01	COR	Removal of 28 day empty property exemption for Council Tax	110	-	-	110
CYP_SAV_01	CYP	Review of Children's Centre Budgets	500			500
	TOTAL		1,378	710	450	2,538

Officer Decisions

Reference	D'torate	Proposal	2023/24 £'000	2024/25 £'000	2025/26 £'000	Total
HRPR_INC_07	HRPR	Development of Surplus Sites	-	-	300	300
HRPR_INC_08	HRPR	Housing Programme Commercial Units' Income Generation	75	75	100	250
HRPR_SAV_03	HRPR	Increased recharging of salary costs to capital	70	30	-	100
HRPR_SAV_04	HRPR	S106 utilisation for apprenticeships	17	-	-	17
HRPR_SAV_05	HRPR	Utilisation of UKSPF grant funding to reduce the general fund burden for the service.	100	5	-	105
HRPR_SAV_06	HRPR	Review of the Temporary Accommodation (TA) Service Level Agreement (SLA) with Lewisham Homes (LH)	162	-	-	162
HRPR_SAV_07	HRPR	Reducing general fund spend on private sector housing licensing and enforcement.	150	-	-	150
CYP_SAV_02	CYP	Education - Vacant Post	12	-	-	12
CYP_SAV_04	CYP	Youth Service Budget Review	200	-	-	200
CYP_SAV_05	CYP	Youth Offending Service Review	100	-	-	100
CYP_SAV_06	CYP	Short Breaks	200	-	-	200

APPENDICES W1 to Z4 2023/24 BUDGET REPORT

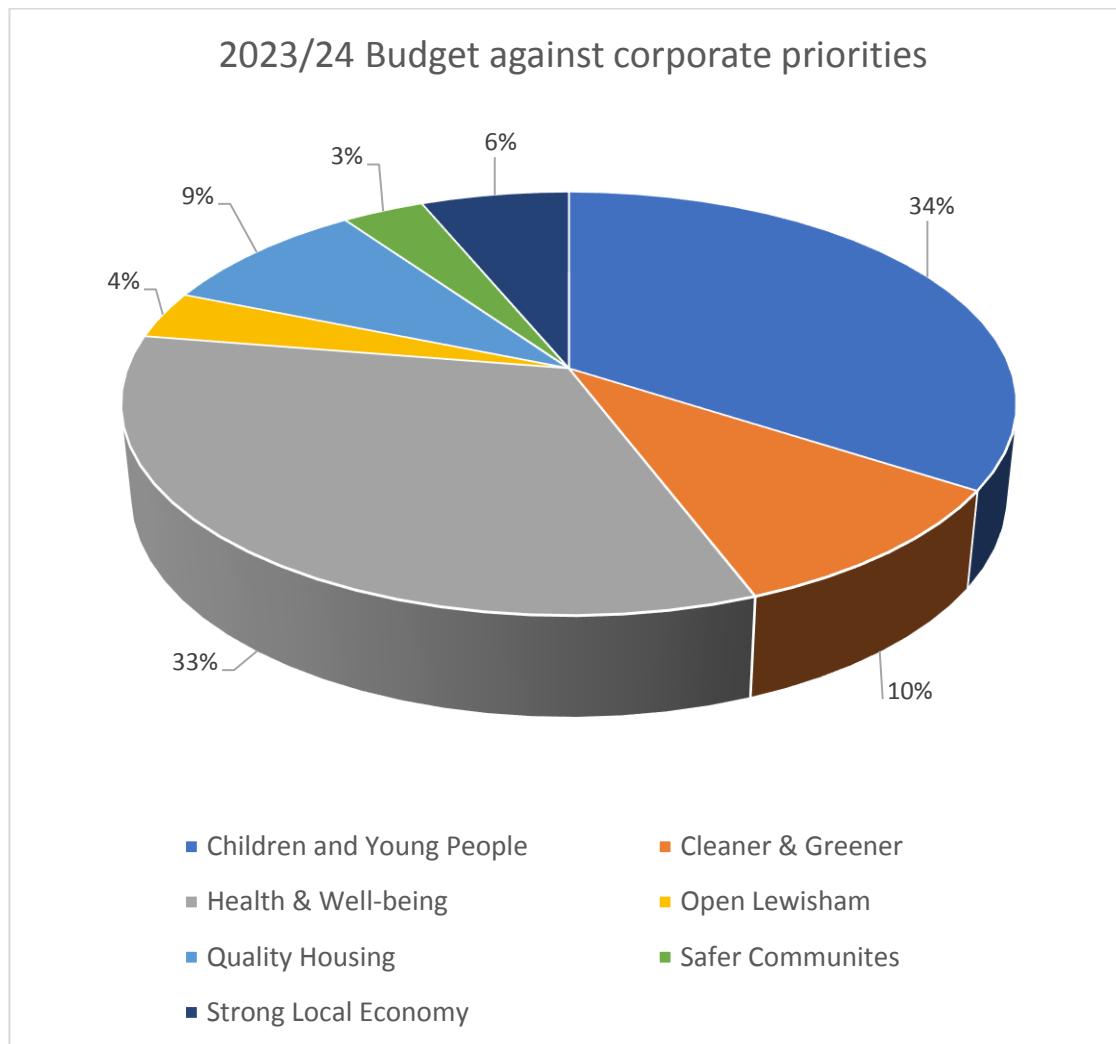
Reference	D'torate	Proposal	2023/24 £'000	2024/25 £'000	2025/26 £'000	Total
COM_SAV_01	COM	Introduction of Electronic Call Monitoring	650	-	-	650
COM_SAV_02	COM	Delegation of Care Plan Budgets to Operation Managers	100	300	-	400
COM_SAV_03	COM	ASC Care Plan Reassessment	1,000	-	-	1,000
COM_SAV_04	COM	ASC Empowering Lewisham	1,000	1,000	-	2,000
COM_SAV_05	COM	Review of Staffing Requirement in Supported Housing	55	-	-	55
COM_SAV_06	COM	Reduction in Mental Health Homecare costs	50	-	-	50
COM_SAV_09	COM	NHS Health Checks	15	-	-	15
COM_SAV_10	COM	Sexual and Reproductive Health Services in Primary Care	46	-	-	46
COM_SAV_11	COM	Public Health weight management savings	13	-	-	13
CEX_SAV_01	CEX	Review of Elections Budget	50	-	-	50
CEX_SAV_03	CEX	Legal Invest to Save	233	-	-	233
COR_SAV_01*	COR	Review of Corporate Budgets - triennial fund valuation	500	-	-	500
COR_SAV_02	COR	Review of Corporate Budgets - interest	2,000	-	-	2,000
COR_SAV_03	COR	Cost avoidance of utilities costs of the Catford Complex	150	-	-	150
ALL_SAV_01**	ALL	Absorption of £2m unfunded pay award	2,000	-	-	2,000
ALL_SAV_02	ALL	Senior Management Reductions, Realignments and Restructures	500	-	-	500
	TOTAL		9,448	1,410	400	11,258

* Following completion of the Pension Fund's triennial valuation, it has been confirmed that this annual reduction in employers pension contribution can be increased to £650k per annum.

** This saving, the £2m absorption of the unfunded pay award, has been reversed as proposals to achieve this cut were not able to be identified.

APPENDICES W1 to Z4 2023/24 BUDGET REPORT

APPENDIX Y3: 2023/24 Budget by Council Priority



As required under the CIPFA Financial Management Code of Practice, the Council must demonstrate how its budget is aligned to its corporate priorities. The above provides an indicative allocation of the proposed net budget for 2023/24 against the seven corporate priorities. This allocation is draft, and will be reviewed alongside the CIPFA code of practice requirements more generally.

APPENDICES W1 to Z4 2023/24 BUDGET REPORT

APPENDIX Y4: Ready Reckoner for Council Tax 2023/24

	Budget	Council	Increase / (Decrease)	GLA	Total	Total
	Requirement	Tax	Lewisham	Precept	Council	Increase / (Decrease)
	Lewisham		Lewisham		Tax	
		(Band D)		(Band D)	(Band D)	
	£m	£	%	£	£	%
2022/23	248.610	1,421.22	2.99%	395.59	1,816.81	4.20%
2023/24	263,679	1,492.13	4.99%	434.14	1,926.27	6.02%
	262.417	1,477.92	3.99%	434.14	1,912.06	5.24%
	261.154	1,463.71	2.99%	434.14	1,897.85	4.46%
	259.891	1,449.49	1.99%	434.14	1,883.63	3.68%
	258.641	1,435.42	1.00%	434.14	1,869.56	2.90%
	258.010	1,428.32	0.50%	434.14	1,862.46	2.51%
	257.379	1,421.22	0.00%	434.14	1,855.36	2.12%

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

APPENDIX Y5 – Chief Financial Officer's Section 25 Statement

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

APPENDIX Y6: Council Tax and Draft Statutory Calculations

Council Tax Calculation

As part of the Localism Act 2011, core Council Tax may not be increased by 3% or more (inclusive of levies) without triggering an automatic referendum of all registered electors in the borough. In addition, there is also the opportunity to increase Council Tax by up to a further 2% under the social care precept for 2023/24. This means, for 2023/24, an automatic referendum will be triggered if the Council Tax increase is 5% or above. The recommended social care precept for 2023/24 is 2%, therefore the recommended total increase is 4.99%. The statutory calculation for whether the Council is required to hold a referendum is based upon the 'relevant basic' amount of Council Tax, which under accounting regulations, includes levies. Any final recommendations on Council Tax levels will need to meet statutory requirements.

To date, Lewisham has so far received no formal notification from the three levy bodies for 2023/24. A zero percent increase has been assumed for these.

Council Tax and Levies

'Relevant Basic' Amount of Council Tax	2022/23	2023/24
Council Tax Base	88,904.9	88,848.5
Council Tax Requirement with Levy (£)	126,353,422	132,573,512
Basic Amount of Council Tax (£)	1,421.22	1,492.13
Increase in basic amount of Council Tax (%)	2.99%	4.99%

Levy bodies for Lewisham	2022/23 £	2023/24 £	Change £
LPFA	1,262,746	1,262,746	0
Lee Valley Regional Park	210,335	210,335	0
Environment Agency	209,476	209,476	0
Total Levies	1,682,557	1,682,557	0

The term "relevant basic amount of council tax" is defined in section 52ZX of the 1992 Act (inserted as above and amended by section 41(1) and (9) to (13) of the Local Audit and Accountability Act 2014).

APPENDICES W1 to Z4 2023/24 BUDGET REPORT

Statutory Calculations

1. It be noted that at its meeting on 18 January 2023, the Council calculated the number of **88,848.5** as its Council Tax base for 2023/24 in accordance with the Local Authorities (Calculation of Tax base) Regulations;
- 2) That the following amounts be now calculated by the Council for the year 2023-24 in accordance with The Local Government Finance Act 1992 as amended by Sections 31A to 36 of the Localism Act 2011 and the Local Audit and Accountability Act 2014.
- 3. In relation to each financial year, a billing authority in England must make the calculations required by this section.**
- 4. The authority must calculate the aggregate of: (in accordance with Section 31A (2) of the Act):**
 - a) £1,458,089,300 being the expenditure which the authority estimates it will incur in the year in performing its functions and will charge to a revenue account, other than a BID Revenue Account, for the year in accordance with proper practices.
 - b) £nil being such allowance as the authority estimates will be appropriate for contingencies in relation to amounts to be charged or credited to a revenue account for the year in accordance with proper practices.
 - c) £nil being the financial reserves which the authority estimates it will be appropriate to raise in the year for meeting its estimated future expenditure.
 - d) £nil being such financial reserves as are sufficient to meet so much of the amount estimated by the authority to be a revenue account deficit for any earlier financial year as has not already been provided for.
 - e) £nil being the amount which it estimates will be transferred in the year from its general fund to its collection fund in accordance with section 97(4) of the 1988 Act, and
 - f) £nil being the amount which it estimates will be transferred from its general fund to its collection fund pursuant to a direction under section 98(5) of the 1988 Act and charged to a revenue account for the year.
- 5. The authority must calculate the aggregate of: (in accordance with Section 31A (3) of the Act)**
 - g) £1,324,543,328 being the income which it estimates will accrue to it in the year and which it will credit to a revenue account, other than a BID Revenue Account, for the year in accordance with proper practices.
 - h) £302,871 being the amount which it estimates will be transferred in the year from its collection fund to its general fund in accordance with section 97(3) of the 1988 Act.

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

- i) £669,589 being the amount which it estimates will be transferred from its collection fund to its general fund pursuant to a direction under section 98(4) of the 1988 Act and will be credited to a revenue account for the year, and
- j) £nil being the amount of the financial reserves which the authority estimates it will use in order to provide for the items mentioned in subsection (2)(a), (b), (e) and (f) above.

6. Council Tax Requirement

- k) £132,573,512 being the amount by which the aggregate calculated under subsection (2) above exceeds that calculated under subsection (3) above, the authority must calculate the amount equal to the difference; and that amount so calculated is to be its council tax requirement for the year.
- l) **£1,492.13** being the residual sum at (k) above, divided by the Council Tax base of **88,848.5** which is Lewisham's precept on the Collection Fund for 2023/24 at the level of Band D;

Band	Council Tax (LBL)
	£
A	994.76
B	1,160.54
C	1,326.34
D	1,492.13
E	1,823.72
F	2,155.30
G	2,486.89
H	2,984.26

Being the amounts given by multiplying the amount at (l) above by the number which, in proportion set out in Section 5(1) of the Act, is applicable to dwellings listed in a particular valuation band divided by the number which in that proportion is applicable to dwellings listed in valuation Band D, calculated by the Council in accordance with Section 36(1) of the Act, as the amounts to be taken into account for the year in respect of categories of dwellings listed in different valuation bands;

It be noted that for the year 2023/24, the Greater London Authority is currently consulting on the following amounts in precepts issued to the Council, in accordance with Section 40 of the Local Government Finance Act 1992 (as amended), for each of the categories of dwellings shown below:-

Band	GLA Precept
	£

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A	289.43
B	337.66
C	385.90
D	434.14
E	530.62
F	627.09
G	723.57
H	868.28

4) Having calculated the estimated aggregate amount in each case of the amounts at 2) (g) and 3) above, the Council, in accordance with Section 30(2) of the Local Government Finance Act 1992, assumed the following amounts as the amounts of Council Tax for the year 2023/24 for each of the categories of dwellings shown below:-

Band	Total Council Tax (LBL & GLA)
	£
A	1,284.19
B	1,498.20
C	1,712.24
D	1,926.27
E	2,354.34
F	2,782.39
G	3,210.46
H	3,852.54

APPENDICES W1 to Z4 2023/24 BUDGET REPORT

APPENDIX Y7: Summary of proposed budget pressures to be funded in 2023/24

Description	£'000 Base Budget	£'000 Once off	£'000 Total
Corporate Strategy priorities			
Open Lewisham			1,022
Local Support Schemes	581		
Borough of Sanctuary	100		
Planning	341		
Quality Housing			4,100
Temporary Accommodation	3,800		
Strategic Housing	300		
Children and Young People			1,500
SEN Transport	1,500		
Strong Local Economy			600
Business Rate Revaluation	100		
Asset income generation	500		
Health and Wellbeing			6,918
Changes in care need and demand	750		
Market Sustainability and Fair Cost of Care	5,000		
Capital investment	988		
Leisure support	180		
Cleaner and Greener			1,650
Environment Services - waste	500		
Flytipping	400		
Parking		750	
Safer Communities			200
Catford Library	200		
Total Corporate Strategy priorities			15,990
Organisational value for money			
Corporate Services	655		
Technology and Audit	1,972		5,307
Centralised income achievement	2,200		
Revenues and Benefits	480		
Energy	3,267	3,060	6,327
Salary inflation for 2023/24	7,120		7,120
Shortfall in salary uplift for 2022/23	4104		4,104
Non-pay inflation for 2023/24	5,000		5,000
Grand Total Funded Pressures	40,038	3,810	43,848

APPENDICES W1 to Z4 2023/24 BUDGET REPORT

APPENDIX Y8: Fees and Charges for 2023/24



Mayor and Cabinet

Report title: Proposed Fees and Charges for 2023/24

Date: 8 February 2023

Key decision: Yes

Class: Part 1

Ward(s) affected: None specific

Contributors: Head of Financial Strategy, Planning and Commercial

Outline and recommendations

The purpose of this report is to present Mayor and Cabinet with

- Fees & Charges that are proposed to be applied to services for the year 2023/24, which have been set in accordance with legislative requirements.

Mayor and Cabinet are recommended to approve both the proposed fees and charges for introduction as of 1 April 2023 and the underlying policy.

Timeline of engagement and decision-making

2 February 2023 – Public Accounts Select Committee (PASC)

2 March 2022 – Budget Report 2022/23 Council

1. Summary

- 1.1 The purpose of this report is to present Mayor and Cabinet with the Fees & Charges that are proposed to be applied to services for the year 2023/24. Charges are broadly set within the Charging Policy and in accordance with legislative requirements.
- 1.2 Those services not listed within this report will be subject to a separate fees and charges setting process.

2. Recommendations

- 2.1 Mayor and Cabinet are recommended to:

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- Approve the Corporate Charging Policy 2023/24 as set out in this report for introduction as of 1st April 2023.
- Approve the proposed fees and charges set out in this report for introduction as of 1 April 2023.

3. Policy Context

3.1 The Council's strategy and priorities drive the Budget with changes in resource allocation determined in accordance with policies and strategy. The Council launched its new Corporate Strategy in November 2022, with seven corporate priorities as stated below:

Corporate Priorities

3.2 The Council's corporate priorities are:

- Cleaner and Greener
- Strong Local Economy
- Quality Housing
- Children and Young People
- Safer Communities
- Open Lewisham
- Health and Wellbeing

3.3 The Council also takes account of the 'Mayor's pledges', as outlined in the 2022 Labour Manifesto. These pledges are as follows:

- Place - We want Lewisham to be a place for everyone.
- Community - We will be relentlessly focused on local.
- Diversity - We will celebrate Lewisham's diversity.
- Inward investment and Opportunity - We will work to attract inward investment.
- Innovation and New Ideas – We will take risks to innovate and seize new opportunities.

Values

3.4 Values are critical to the Council's role as an employer, regulator, and securer of services and steward of public funds. The Council's values shape interactions and behaviours across the organisational hierarchy, between officers, and members, between the council and partners and between the council and citizens. In taking forward the Council's Budget Strategy, we are guided by the Council's four core values:

- We put service to the public first.
- We respect all people and all communities.

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- We invest in employees.
 - We are open, honest, and fair in all we do.
- 3.5 The setting of fees and charges to ensure that these recover the full cost of delivering the services wherever permissible and appropriate supports the Council's general fund position and therefore directly supports the achievement of the Council's corporate priorities.
- 4. Background**
- 4.1 Councils are involved in a wide range of services and the ability to charge for some of these services has always been a key funding source to support the cost of providing the service.
- 4.2 The Council provides both statutory and discretionary chargeable services. Where fees and charges apply to statutory services these are often set nationally, for example some planning and licensing fees. The majority of statutory services, Building Control being a notable exception, are not funded directly from fees and charges but instead from the Council's other main sources of revenue, i.e. government grants and local taxation. Examples of services funded in this way include Highways, Children's Services, Street Cleansing and Domestic Refuse services.
- 4.3 There may be circumstances where the charge is set not just to ensure it recovers cost, but also to achieve other aims, such as, where the Council wishes to manage demand, or deter or incentivise certain behaviours such as encouraging re-cycling, discouraging trade use of civic amenity waste sites etc.
- 4.4 The remaining chargeable services where the Council levies fees and charges are of a discretionary nature. These cover a wide range of services such as Libraries, Pest Control, Commercial Waste, Leisure & Recreation facilities, and Parking. Discretionary Services are those that an authority has the power to provide but is not obliged to. This report includes recommendations for the appropriate level of fees and charges for 2023/24 for the majority of these types of services.
- 4.5 The Council has an agreed Charging Policy that provides guidance for budget holders in how to set fees. The policy aims to encourage a consistent and cost effective approach to the setting of charges for services provided by the Council.

5. Summary of Proposed Changes 2023/24

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The proposed 2023/24 charges as compared with 2022/23 are appended.

5.1 Green Scene

All fees and charges for the service are discretionary and are summarised into the following categories:

5.1.1 Pest Control

These are proposed to increase in line with inflation of the key cost drivers of the service, which is circa 6% in 2023/24.

5.1.2 Clinical Waste

Clinical Waste fees and charges will increase in line with general inflation of 10% in 2023/24.

5.1.3 Allotment

Allotment rents will be increased by 9.9% for 2023/24. The Allotment rents will be reviewed in more detail when resources permit as we look to develop a full cost recovery model for the service.

5.1.4 Nature Conservation

Fees and charges for Nature Conversation are proposed to increase in 2023/24 by between 10.2-18.2%. These increases are set higher than 9.9% assumed inflation due to figures being rounded up to the closest integer to make administration of fees and charges easier as requested by users. However, the charge for hire for Lewisham Schools remains the same as 2022/23.

5.1.5 Outdoor hire in Beckenham Place Park

Charges for commercial events are proposed to increase by 6% in 2023/24 to cover inflationary pressure on staff costs, the largest cost driver of this service.

5.2 Licencing

The statutory fees and charges within Licensing are centrally determined and set. There are currently no proposed increases to statutory licensing items in 2023/24. All discretionary fees and charges are also proposed to remain the same in 2023/24.

5.3 Tennis Courts

These are discretionary fees for the use of Council tennis courts and are not proposed to increase for 2023/24.

5.4 Leisure Centres

Officers have discussed and reviewed the fees and charges proposed for 2023/24 by our leisure centre operators (1Life for Downham and GLL for the remainder of the portfolio). The proposals equate to an average uplift of 5.1% for 1Life and 6.4% for GLL. There are variations in % increase across the individual price lines but they accord with the terms and conditions of the respective contracts.

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Helpfully these price increases are substantially below the rate of inflation which should encourage people to return to health and fitness activities when considering their discretionary spend against a backdrop of the cost of living crisis.

5.5 Community Centres

The proposed price increase is between between 6% and 10% to reflect inflation.

5.6 Library and Information Service

The fees and charges for the Library and Information Service are discretionary; these are predominantly set to remain the same in 2023/24. There have been a few items with proposed increases; relating to stationary sales and printing services. As these are relatively minimal value items (currently being charged between 5-20p), the proposed rises are between 100-300%, to ensure full cost recovery. The 50p charge for standard reservations has been removed for 2023/24, and there is instead a proposed additional 50p charge for non-collection. Charges for the room hire of Downham Library are proposed to increase by 17.6%, also to achieve full cost recovery. There are a number of new rooms being available for hire in 2023/24.

5.7 Adult Social Care

5.7.1 Non-residential unit cost

The proposed increase to the fees and charges for the service as set out within the report follows a cost modelling and benchmarking exercise as part the national fair cost of care exercise. The Department of Health and Social Care (DHSC) consider ‘fair’ to mean the median actual operating costs for providing care in the local area (following completion of the exercise). ‘Fair’ also means what is sustainable for the local market. The proposed increase will impact self-funders that broker their non-residential care through the Council as well as those paying a service user contribution.

5.7.2 Brokerage Fees

This is a new charge for people with capital above the upper capital threshold limit will be required to meet the full cost of their care fees from their own resources and are deemed to be “self-funding”. People who need care and support in care and who are self-funding will usually make their own arrangements with the care provider regarding their care and payment of fees. The Council can however make arrangements on behalf of an individual if they lack mental capacity to do so. These arrangements can include brokering the contract on behalf of the person or entering into a contractual arrangement with the provider.

The Council may also, if requested, arrange care in a community setting, for which an arrangement / administration charge of £300 will be

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introduced from the 1st of April 2024. This will impact existing self-funders as well as new entrants.

5.8 Adult Learning

The majority of the fees and charges relate to the sale of items within the café and are therefore charged on a traded service basis, whilst the course fees are discretionary. On average, fees are rising by between 6.7-11.5%. Given the price per café item can be relatively small, these have been rounded appropriately, resulting in a range of percentages broadly in line with inflation.

5.9 Bereavement

The majority of fees and charges for existing provisions are proposed to increase by 8-11%. The Adult Direct Cremation service is however subject to a fee reduction of 10.7%, ensuring a low cost for those financially vulnerable. A number of new provision items have been incorporated into the service; these are broadly cremation and memorial related. There has been an introduction of two new penalty charges; including an environmental penalty for metal caskets, as well as a charge for additional cremation cleaning services. On the whole, charges are rising in line with inflation, and new charges are predominantly focused on cost recovery.

5.10 Revenues Service

The fees levied under the Revenues service include the collection and enforcement of business rates and council tax collection, all of which are statutory and centrally set and have not increased for 2023/24. All discretionary fees and charges are proposed to increase in line with inflation by 10%.

5.11 Register Office

The statutory fees are set by the General Register office; these were last increased on 16th February 2019 and there are currently no proposed increases for 2023/24. A new postage service has been introduced, to be charged on a discretionary basis. Ceremonies are comprised of a fixed statutory fee of £46 in addition to a discretionary element. Private Citizenship ceremonies, however, are charged entirely on a discretionary basis. All discretionary fees and charges are proposed to increase by 10-11%, in line with inflation.

5.12 Street Environment Service

The fees and charges for Street Environment Services have been substantially amended, in accordance with the budget reduction proposals agreed by Mayor and Cabinet on the 7th December 2022. As per the proposal references HRPR_INC_03 and HRPR_INC_05, the charges for the collection and disposal of bulky waste items and fridges/freezers have broadly doubled. Given the budget strain, a free mattress collection service is no longer sustainable; SES are therefore introducing new fees and charges in respect of this service, as well as new charges for the provision of replacement waste containers.

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5.13 Forecourt Licences

The licence fees are (discretionary) set by the Lewisham licensing supplementary committee and the law requires to charge fees as per what the committee has agreed. The same fees must be charged in all licence streets without discrimination.

Licence fees vary depending on the size of the forecourt. We currently charge £6.05 per square metre per week in addition to a £33 application fee. Our fees were not increased for several years due to constraints within the service resourcing. This has resulted in Lewisham being one of the cheapest licensing authorities for forecourt charges in South East London. The proposed fees and charges will increase by circa 10% for 2023/34 and the licensing supplementary committee will next meet on the 7th and 28th February.

5.14 Building Control

The majority of fees and charges are proposed to increase by 4% in line with inflation of the key cost drivers for the service, with select lower band fees being subject to higher increases of between 16-20%. It should be highlighted that the department still makes a loss despite the selective higher increase in fees. However, the pricing has been set appropriately to ensure the fees remain competitive.

5.15 Planning

The bulk of the Planning fees are statutory and set by Central Government. These were last increased on 17 January 2018.

Discretionary fees were frozen across all the Planning chargeable services in 2022/23. The service does not wish to increase their discretionary fees for planning advice aimed at small businesses and residents undertaking small projects. Experience has shown that the take up these services is price sensitive. Conservation advice fees have been frozen for 2023/24 as take up of the service is minimal.

Charges for Planning Advice services (Pre-applications, Design Review Panel and Planning Performance Agreement (PPA)) aimed at developers and planning professionals have been increased by 5%. Charges for officer time have been increased by 10%.

Charges for confirming and removing enforcement notices have been increased after bench marking with other comparable local authorities.

Local Land Charges service operates as a Trading Fund and their fees and charges have not been reviewed for many years. The increases have been benchmarked across other local authorities. A number of new services have been introduced to reflect demand and to remain competitive after the migration of LLC1 service to HM Land Registry.

5.16 Highways

The various fees and charges are all discretionary services and there are no new services being introduced. Overall, the individual charges have increased by 9.4-11.3% in line with inflation.. The only substantive change is that the service is moving away from a single flat fee in respect of delivering the

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installation or extension of crossovers, towards a minimum fixed fee plus the contractual build costs instead, this is more transparent and consistently ensures full cost recovery.

5.17 Street Name and Numbering

The various fees and charges for SNN are on a discretionary basis; of which all are proposed to increase by 7.7-10% in 2023/24, effectively in line with inflation. Individual fees and charges have been rounded appropriately for the convenience of payment.

5.18 Private sector housing and home improvement

5.18.1 Licencing and Housing Enforcement:

The team will continue to charge for the service of notices under Housing Act 2004. These include Improvement Notices and Prohibition Orders. Charges will be waived if the notice is complied with fully and within the timescales set out, or if there are other compelling reasons that make it unjust to charge this fee in the circumstances of the individual case. The team will continue to charge for a number of discretionary services dealing with property inspections and the property licensing process. These charges are in addition to the fees charged to licence properties that fall under the national mandatory and additional schemes. These are Adequate Accommodation Assessments as required by the Immigration Rules 2016, drawing up floor plans required for HMO licence applications and assisting members of the public to complete the HMO licence application forms.

All discretionary charges will be increased by 9.6 per cent in line with inflation in 2023/24 (rounded up or down for convenience of payment). The only exception is assisted HMO license applications which will be increased from £54 to £175 (plus VAT). The Council has conducted a benchmarking exercise with neighbouring boroughs, and the current charges were found to be significantly out of step with what others are charging for the service. This had previously not been conducted and has allowed for clearer direction as to the charges required to recover costs; we therefore propose to increase the charge based on full cost recovery.

Our additional property licensing scheme was only introduced in April 2022 and at this time we are not minded to increase fees in line with cost increases, given the recent introduction of the scheme. The scheme will run for five years, and fees will be kept under review.

In 2023 the Council is due to make an application to the Secretary of State for Levelling Up, Housing and Communities to introduce a large selective property licensing scheme. Fees for this scheme have been consulted on, and are due to be approved by Mayor and Cabinet in the spring.

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5.18.2 Empty Homes:

The team intends to charge a fee of £170+ VAT, to provide letters confirming that a property has been empty for a period of 2 years. The letter enables developers and home owners to claim VAT reduction or exemption whilst bringing the property back into use. This is an increase of 9.6% from 2022/23, in line with inflation (rounded down for convenience of payment).

5.18.3 Grants and loans:

The agency and adaptations fees charged for services provided as a result of delivering our mandatory and discretionary home improvement grants are being reviewed as part of the refresh of our Housing Assistance policy. This is due to be completed in spring 2023, and will be subject to approval by Mayor and Cabinet Committee. As a result, until the refresh has been completed, all fees for these services remain as set out in 2022/23.

5.19 Environmental Health

5.19.1 Massage and Special Treatment Licences

Fees for the administration of Special Treatment licences are discretionary and historically have been low in Lewisham. An increase of 10% is proposed for all treatment classes in 2023/24. The fees have not been increased since 2011, so a 10% increase is reasonable and would remain considerably lower than many other London authorities. Due to the complexity of work involved in evaluating charging schemes, a review of the fee structure for all treatments is planned for 2024/25 to reflect changes in the industry with a wider range of treatments available.

5.19.2 Zoo Licences

Fees for the administration of Zoo licences are discretionary. An increase of 10% is proposed for 2023/24 and this is a very reasonable fee in comparison to other local authorities.

5.20 Housing Services to Residential Providers

The Housing Register Assessment & Allocations Team currently levy a charge for two services to a variety of housing providers as part of the relevant nominations agreements. These services are Housing Medical Assessments and Lewisham's 'Find Your Home' Property Advert (choice based lettings service). The current 2022/23 fees are as follows:

Service	Unit	Basic £	VAT £ (20%)	Total £
Housing Medical Service	Per Assessment	30	6	36
Find Your Home	Per Advert	111	22.2	133.2

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Property Advert				
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It is the service's intention to review and amend these fees in 2023/24 to ensure that full cost recovery is achieved. This will be achieved via a review and amendment of the relevant nominations' agreements.

5.21 Commercial Waste

All Commercial Waste fees and charges are proposed to increase by 10% in 2023/24 in line with inflation.

5.22 Garden Waste

Garden Waste is proposed to be increased by 6% to reflect inflationary increases in the services main cost drivers.

5.23 Parking

Parking emission-based charges were introduced in April 2020, following approval by Mayor and Cabinet in January 2020. It is proposed that the current emission-based banding is reviewed to introduce a new Band 0 for zero emission vehicles which provides an incentive for residents and business owners to make the switch to electric vehicles. This in turn is supported by an increase in other banding charge fees which apply to emission emitting vehicles. This proposal is in direct support of the Council's Air Quality Action Plan and Climate Action Plan which aims to encourage motorists to switch to lower emission-based vehicles and promote more sustainable modes of transport. The proposed 2023/24 charges as compared with 2022/23 are appended.

5.23.1 Resident Permit

The Council monitored potential trends in permit sales since the implementation of the emission-based charges. Our data shows that following implementation of the policy, more purchases have been made in lower rather than higher emission bands. Positively, this highlights that the policy is achieving its goal of reducing vehicles with higher emissions throughout Lewisham.

To further encourage a move towards a cleaner Lewisham, we are introducing a Band 0 to our emission-based charges policy. Emission band 0 constitutes only electric vehicles with zero emissions. The charges for emission band 0 (electric vehicles) will be the lowest charge within the emission bands, with the hypothesis based on previous results that it will incentivise residents throughout Lewisham to switch to lower emission vehicles.

Further, in order to align with Lewisham's Climate Action Plan, the charges for resident permits will increase by 10% for all emission bands, in line with inflation. For perspective, band 4 has the highest percentage of total vehicles (13%). Despite the increase in price, the price for the permit is still low when taking into consideration the daily permit price.

We are also proposing to increase the diesel surcharge from £50 to £70 (except Euro-6 compliant vehicles) to drive behaviour towards deterring the use of higher polluting vehicles.

5.23.2 Business Permit

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Business Permit sales also present a similar trend to that of Resident Permits with more vehicles in lower emission bands than previously observed with the highest number of vehicles being in emission band 4.

5.23.3 Resident Visitor Vouchers

There is a set rate for all vehicles for Visitor Vouchers and currently emission-based charging does not apply as visitor vouchers cannot pre-determine the vehicle emission types. However, we are proposing to increase the cost of Visitor Vouchers in order to encourage visitors to Lewisham to commute using sustainable modes of transport. With the current price per voucher, it costs only £0.64p an hour for 5 hours. This encouraged visitors to purchase the 5-hour permits. As the Council is working to discourage congestion, the price has been proposed to increase to £4.50 for 5 hours.

Currently all annual resident permit holders receive a free book of visitors (10 vouchers) on the renewal of their permit. This costs the service in the region of £48k per annum. The proposal is to retain the current benefaction in order to assist residents with the cost-of-living crisis.

5.23.4 All Zone business

There is no notable behavioural change on All Zone Business Permits, however, based on the change in behaviour for Resident Permits and Business Permits, Lewisham Council is proposing a further increase in the price of the permit by 10%, in line with inflation.

There will also be an introduction of band 0 for All Zone Business Permits to further encourage the move towards zero emission electric vehicles.

Band 4 has the highest percentage of total vehicles (17%). Motorists purchasing this permit will have access to all zones across the borough, as we are trying to lower emissions, this reflects the higher permit prices for diesel vehicles as they produce the most harmful carbon emission.

5.23.5 Community Health Permits (4hrs Parking)

This Permit is currently named *Essential Services Health Permit*. We are proposing a change of name to *Community Health Services Permit*. The permit is issued to those delivering hands-on care in the community, and now allows for 4hrs parking (previously 2hrs).

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We initially looked towards proposing the increase of price for the Community Health Permit by 50% for each emission band. Although this is a high percentage increase, due to the low starting price, the actual increases are modest, with an increase of only £0.13p per day in band 5, which holds the highest percentage of vehicles. When taking into consideration that this permit allows for motorists to drive around the borough, thus increasing carbon emissions, the Council deems it appropriate to increase the Community Health Permit to be in line with the Hospital Health Permits proposed charges, which previously had higher charging rates than the Essential Services Health Permit. Under the proposed charges, band 4 (19%) are still only paying £1.76) a day to park. It should also be highlighted that by this principle, All Zone Business Permit charges are also charged at a higher rate than Business Permits.

Lewisham Council are also introducing an emission band 0 for this permit for zero emission EVs, with it being the lowest charge of the emission bands.

5.23.6 Hospital Health Permits

Hospital Health Permits are issued for University Lewisham Hospital; these are on-street parking permits for NHS staff who cannot use public transport due to their home location and shift pattern. These permits are valid in Rushey Green Zones Z-E.

In line with inflation, we are increasing the cost of the permit by 10%.

5.23.7 Staff Annual Permit

The Council is proposing that Staff Annual Permits are charged at the same rate as Business Permits for uniformity.

We are proposing an increase in price to reflect a deterrence for staff to travel via singular motor vehicles, and to encourage travel via more sustainable modes of transport. Currently the highest percentage (16%) of vehicles is band 4.

As the Council is aware that not all staff are able to use public transport, walk or cycle, we are introducing an emission band 0 to encourage staff to switch to lower emission vehicles.

5.23.8 Staff Daily Vouchers

Since the pandemic, staff daily vouchers have been introduced to offer a more cost-effective rate for the majority of Council staff who now have a hybrid working arrangement. In September 2022, the Council introduced a staff voucher app to create ease of access for

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staff to book and purchase vouchers at any given time. Staff Daily Vouchers are currently under 13 emission-based charges.

Similar to other permit types, there was a pattern identified regarding the permit purchase in different emission bands suggesting that emission-based charges are encouraging motorists to purchase vehicles with lower emission bands. We are proposing to increase the price of the Staff Daily Vouchers and to implement an emission band 0 as the Council is trying to reduce commuting to work where possible.

A Staff Travel Plan is currently being developed to encourage staff to travel to work sustainably, promoting walking, cycling and public transport as the most attractive and viable options. This is expected to be launched in April 2023.

5.23.9 Introduction of charging for other Council sites

Staff Permits are currently under emission-based charges. The Council has other buildings aside from Laurence House (i.e., Wearside depot.). We will introduce charges to these buildings to align all our buildings to the emission-based charges policy.

The Council recognises that there are staff who are required to attend these sites at unsociable hours and transport may be limited. To tackle this issue, staff under these circumstances are exempt.

There are currently recruitment packages that include free permits offered to those within the Children Services working as social workers. This goes against Council Policy to encourage fewer staff to drive to work and will thus be abolished. Relevant staff will be encouraged to use Zip Cars for work visits, which will be based at Laurence House.

5.23.10 Pool Cars

We are proposing to reduce the use of Pool Cars where possible (29 vehicles). As part of the travel plan, we will work with Council services to look at other modes of transport that are more cost efficient for the Council and environmentally friendly. We are also working with the contractor, Zip Car, to provide alternatives, and a pilot scheme is being developed for the provision of round-trip Zip Cars available to staff during working hours for site visits.

5.23.11 Pay By Phone

In line with the Emission-based parking charges policy, Pay By Phone Emission based charges were introduced in 2021. Unlike our other permits, these charges are per hour.

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The Council are introducing emission band 0, which is exclusively for electric vehicles. This will also be the lowest emission band charge at £1.80. This is to encourage more motorists to switch to electric vehicles as only 1% of vehicles purchasing Pay by Phone permits are electric.

The proposed charges are shown in hourly rates. Motorists can pay for the first hour only in 15-minute intervals. Thereafter, only hourly rates will apply.

The diesel surcharge does not apply to vehicle that are euro-6 compliant. The above applies to off-street car parks also.

5.23.12 Suspensions

In line with the current inflation rate (9.6%), we are proposing to increase the price of suspensions. We have a high demand for suspensions and the Council is trying to deter suspensions of bays to decrease air pollution from vehicles, in line with the Air Quality Action Plan. Further, to deter the use of bays that is not for their intended purposes.

We are proposing an increase from £50 to £55 for Admin Fees, this is in line with the current inflation rate. Further, we are proposing to increase the cost of the fees to be raised for Pay and Display Bays (£30 to £50) and Resident Bays (£50 to £55). The reason for such an increase is based on 9.5 hours parking time and the cost of the most expensive vehicle parked i.e., non-Euro-6 compliant diesel vehicle at £5.50/hour = £50).

Based on a benchmarking exercise, the Council is also taking into consideration the implementation of a charge for emergency or short notice period suspensions.

5.23.13 Housing Estate Permits

To align with the Air Quality Action Plan in January 2022, Lewisham Homes introduced Traffic Management Orders (TMOs) to manage and enforce parking on its housing estates meaning the estates are now managed by Lewisham Council's Parking Services.

Lewisham Council are introducing Housing Estate Permits. The permit charges will be in line with our emission-based charges policy that was introduced in April 2020.

Given the huge disparities of housing estate charges, the Council is proposing to phase the increase of charges over 2 years. The figures outlining the projections over the next 2 years are proposed below. We propose that the current visitor permit charges are in line with on-street charges.

There will be an emission band 0 that is exclusively applicable to electric vehicles. In the first year, for a 12-month permit, emission band 0 will be charged the lowest at £8.75. Emission band 13, the highest emission band, will be charged at £62.50 (petrol vehicle). Diesel vehicles in band 13 will be charged at £75.00. Annually, the price for the permit will increase across each emission band to encourage motorists to use sustainable modes of transport. The difference in price for the emission bands reflects Lewisham Council's incentive to encourage motorists to move towards purchasing electric vehicles in order to lower emissions within Lewisham.

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5.24 Market Traders

The price for market pitches have not increased since April 2019. We are proposing an increase of 10%, in line with inflation. In order to support the local economy and encourage new local business to start up, we are also proposing a discount of up to 50% on their first 6 months for new traders where the commodity is difficult to obtain i.e., flower stall.

A new Trader Permit is also being introduced, specifically for market traders only; intended to allow traders to set up their stall and park their vehicle.

6. Legal implications

6.1 Discretionary services are those which an authority has the power to but is not obliged to provide. Section 3 of the Localism Act 2011 allows authorities to charge for discretionary services offered under their general power of competence and sits alongside the powers already available to local authorities to charge for discretionary services in function-related areas under Section 93 of the Local Government Act 2003. Authorities cannot charge for services that they have a statutory duty to provide.

6.2 This Act introduced the following key points:

- Authorities are under a duty to ensure that, taking one year with another, the income from charges do not exceed the costs of provision.
- The recipient of the discretionary service must have agreed to its provision and agreed to pay for it.
- Charges may be set differentially, so that different people are charged different amounts.

6.3 The law is complex and some services and charges are bound by further specific legislation. Services are expected to be aware of the legislative context that applies to their area of responsibility and seek advice as required from Legal Services.

6.4 The approach to these issues set out in the draft Corporate Charging Policy 2023/24.

7. Equalities implications

7.1 The Equality Act 2010 (the Act) introduced the public sector equality duty (the equality duty or the duty). It 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.

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- 7.2 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.
- 7.3 The duty continues to be a “have regard duty”, and the weight to be attached to it is a matter for the Mayor and Cabinet, 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. Assessing the potential impact on equality of proposed changes to policies, procedures and practices is one of the key ways in which the Council can demonstrate that they have had ‘due regard’.
- 7.4 The Equality and Human Rights Commission 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 services and public functions. 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:
<http://www.equalityhumanrights.com/legal-and-policy/equality-act/equality-act-codes-of-practice-and-technical-guidance/>
- 7.5 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
 - Equality objectives and the equality duty
 - Equality information and the equality duty
- 7.6 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

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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/>

- 7.7 Assessing impact on equality is not an end to itself and it should be tailored to, and be proportionate to, the decision being made. Whether it is proportionate for the Council to conduct an Equalities Analysis Assessment of the impact on equality of a financial decision or not depends on its relevance to the Authority's particular function and its likely impact on people from protected groups, including staff.
- 7.8 It is also important to note that the Council is subject to the Human Rights Act, and should therefore, also consider the potential impact their particular decisions could have on human rights. Where particular cuts have such implications, they must be dealt with and considered in relation to those particular proposals before any final decision is made.

8. Crime and Disorder implications

- 8.1 There are no direct crime and disorder implications associated with this report.

9. Climate Change and environmental implications

- 9.1 Protection of the environment is a key consideration in determining charges for services. For instance, through emissions based charging for parking and by encouraging waste is reused or recycled.

10. Health and wellbeing implications

- 10.1 There is a wealth of evidence to highlight that the benefits of an active lifestyle are far reaching and impact positively on people's lives. Those who play sport and are active are healthier, happier and more likely to be successful in academic and professional life. Fees & Charges, for instance, for hire of tennis courts are not being increased.

11. Further implications

- 11.1 There are no further implication arising from this report.

12. Report author and contact

- 12.1 Katharine Nidd, Head of Financial Strategy, Planning and Commercial
020 8314 6651, Katharine.nidd@lewisham.gov.uk

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Lewisham's Corporate Charging Policy

Lewisham's Corporate Charging Policy 2023/24

1. Introduction

- 1.1 The management of fees and charges is fundamental to both the financial performance of the Council and the achievement of the Council's key priorities. The absence of a corporate policy has sometimes led to fees and charges being set without due consideration to corporate priorities resulting in fragmented charging mechanisms.
- 1.2 This policy applies to all fees and charges which the Council has the discretion to set.

2. Policy Aims and Objectives

- 2.1 The aim of this policy is to create a standardised approach to charging and establish an overarching set of principles that formulate consistency in the application of concessions and subsidies. It is designed to:
 - Ensure a structured, corporate approach to the review and increase of fees and charges throughout the Authority in accordance with the principles of Best Value.
 - To ensure that the charges made for discretionary services are consistent with and contribute towards the achievement of the Council's agreed aims and objectives.
 - To ensure that all opportunities for charging are identified and considered on a regular basis by service areas.
 - Ensure sufficient information is collated and presented to Service Heads and members to enable them to make informed decisions.

3. Statutory principles for charging

- 3.1 The Local Government Act 2000 gave local authorities a wide power to act for the economic, social and environmental well-being of their areas. The general power to charge for **discretionary services** was included in the Local Government Act 2003. Key features are summarised below:
- 3.2 Authorities are under a duty to secure that, taking one year with another, the income from charges do not exceed the cost of provision.
- 3.3 Authorities must already have the power to provide the service and the recipient of the discretionary service must have agreed to its provision and to pay for it. Conversely, the Act does not override any provisions which either expressly prohibits the charging for the service or confers a power to charge. Discretionary services are those services that an authority has the power but not a duty to provide.

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- 3.4 Charges may be set differentially, so that different people are charged different amounts. Authorities are not required to charge for discretionary services and may provide them free if they so decide.
- 3.5 The Localism Act 2011 has increased Local Authorities general powers of competence to allow Local Authorities to act for commercial purposes and to charge, or not charge, for this. However, section 3 limits that where the Local Authority is exercising this general power and provides a service to a person otherwise than for a commercial purpose (and it is not a statutory service), then, taking one year with another, the income from charges is not allowed to exceed the cost of provision.

4. Lewisham's Principles for Charging

4.1 Corporate Priorities and Service Objectives

Fees and charges should be used to assist in the delivery of the Council's corporate priorities as set out in the Corporate Strategy and service objectives. The annual review of fees and charges should consider what corporate priorities the service contributes to, why the Council is providing the service and who benefits from it. Where there is conflict in the achievement of the Council's corporate priorities, the advantages and disadvantages of the competing, often incompatible, objectives will need to be clearly set out as part of the annual review.

4.2 When will Lewisham Charge?

Whenever possible, Lewisham will charge for discretionary services with the aim of recovering the cost of providing the service from the service user rather than the general council tax payer. The main exceptions are:

- Where the user of the service cannot practicably be separately identified and charged. e.g. use of parks and open spaces
- Where it would not be cost effective to administer and collect.
- Where charging would be counterproductive
- Where there is no legal basis to charge for the service
- Where an alternative charging policy e.g. concessionary fees aimed at social inclusion has been expressly approved

4.3 What will Lewisham charge?

All fees and charges will fall under one of the following charging basis:

Charging Basis	Objective
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Commercial charges	Charges are based on what the current market will bear. It should cover the full service cost (including overheads) plus an amount to cover service improvement. Commercial costs should not be subsidised by the Council Tax payer, but costs can be recovered over a period of time (say three years). If there is any justification for subsidies in this area, they must be approved by Mayor and Cabinet on a case by case basis and can only apply for a limited period of time.
Full cost recovery	Charges are based on the need to recover the full cost of providing the service, including overheads, from those who use it
Subsidies and concessions	Service users make a contribution to the costs of providing the service. This might be to meet a service objective or allow competition with other providers
Free	The Council chooses to make the service available at no charge (fully subsidised) to meet a service objective. The justification for this must be reviewed and agreed by DMT on an annual basis
Statutory charges	These are set by statute and the Council has no power to amend the level of charging. Services should seek to recover costs as far as possible by controlling the expenditure incurred in delivering such services.

4.4 Concessions and subsidies

There is a need to establish a uniform policy for granting discretionary subsidies and concessions, where they currently exist, based on council-wide criteria in order to avoid departmental variations.

Subsidies and concessions are variations from standard charges. Subsidies are given when only part of the cost is recovered from service users, and reduces the impact of a charge across all groups. Concessions target specific user groups to ensure they are not precluded from the benefits of the service, and are when discounts are given to an individual or group based on their individual circumstances.

Subsidies and concessions are **not** suitable for all discretionary charges (e.g. skips and scaffold licences), and should only be granted where they are considered appropriate. They should only be applied to support or promote corporate priorities and service objectives, and where their cost implications can be both quantified and accommodated within a service's budget. They should always relate to the Council's objectives and must be approved by the relevant DMT, and following a full Equality Analysis Assessment

There are exceptions in cases where some service users are statutorily or otherwise granted free use of the service or a higher concessionary rate. For

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example, where equality implications outweigh financial benefits, as in the case of blue badge holders who have free parking and a free resident's permit.

Concessionary charges should only apply to Lewisham residents and Lewisham based voluntary groups except where it is impracticable to do so.

They should not normally apply at times or in situations which would result in the loss of income from users paying the standard charge.

Any departure from this policy must be approved by the relevant DMT.

4.5 Process and frequency for reviewing charges

Reviews of charges should be undertaken as an integral part of the service and financial planning process as part of budget preparation and setting for each year and to ensure consistency with the Council's corporate priorities and service objectives.

In reviewing charges, the following questions should be addressed:-

- Why are we providing this service?
- Who benefits from the service – individuals or the community?
- Is this service subsidised from Council funds? If so, have we the appropriate approval to do so?
- How much do residents and businesses value the service?
- How willing and able are they to pay for it?
- What do our nearest neighbours and the private sector charge for the same or similar service?
- What is the trend in user demand and the forecast effect of any price change?
- How can charging affect behaviour and assist service objectives and corporate priorities?
- What would be the impact of a price increase on other service areas? e.g. Lumber collection and fly tipping

Appropriate consultation with service users and stakeholders, and consideration of equalities impacts should be undertaken in respect of any proposed **significant** change to current charges or in relation to the introduction of significant new charges.

As a minimum, the Council's annual inflation rate plus an additional percentage increase should be applied to all fees and charges on an annual basis with effect from 1st April each financial year where appropriate. This is to allow the Council to recover increases in costs due to the current economic climate. In applying this rate there is the flexibility for service managers to round charges up or down to allow for reasonableness in charging.

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It is recognised that it is not appropriate for every service to annually inflate charges due to the nature of the service. In these circumstances, charges should be inflated as regularly as possible to keep income in line with cost. This is still to be reported and captured as part of the annual fees and charges report.

The inflation plus rate will be determined and communicated by Finance as part of annual budget process, by the end of September each year.

Service Heads must consider and identify as part of the annual budget-setting process any activities within their remit for which new fees may be appropriate. Information should be provided on the estimated levels of additional income achievable and where relevant, how this compares to other similar Authorities and whether charging is therefore considered appropriate. This is to be included as part of the annual fees and charges report.

4.6 Financial Management and Monitoring of Income

Responsibility for the collection and monitoring of income relating to fees and charges should be clearly assigned within each service area. This is to form part of the monthly budget monitoring process and reporting to EMT monthly and Mayor and Cabinet quarterly.

5. Policy Review

This policy should be subject to regular review, with resulting recommendations proposed to members for approval as part of the annual fees and charges setting process

6. Further information

For advice or further information regarding the content or application of this policy, please contact Katharine Nidd, Head of Strategic Finance, Planning & Commercial, Katharine.Nidd@lewisham.gov.uk

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2023/24 Proposed Charges

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SERVICE: GREEN SCENE

GREEN SCENE	UNIT	Charges 22/23			Proposed charges 23/24			% Change	Basis for charging
		Basic (£)	VAT (£)	Total (£)	Basic (£)	VAT (£)	Total (£)		
Pest Control									
Rats Domestic		60.66	12.13	75.00	63.09	12.62	79.50	6.00	Discretionary
Rats Commercial	From	125.00	25.00	150.00	132.50	26.50	159.00	6.00	Discretionary
Mice Domestic		104.00	20.80	125.00	108.16	21.63	132.50	6.00	Discretionary
Mice Domestic Concessions		52.00	10.40	62.50	54.17	10.83	66.25	6.00	Discretionary
Mice Commercial	From	125.00	25.00	150.00	132.50	26.50	159.00	6.00	Discretionary
Cockroaches Domestic		130.00	26.00	156.00	136.67	27.33	165.36	6.00	Discretionary
Cockroaches Domestic Concessions		65.00	13.00	78.00	68.33	13.67	82.68	6.00	Discretionary
Cockroaches Commercial	From	156.00	31.20	187.20	165.36	33.07	198.43	6.00	Discretionary
Pharaoh Ants Domestic		130.00	26.00	156.00	136.67	27.33	165.36	6.00	Discretionary
Pharaoh Ants Domestic Concessions		65.00	13.00	78.00	68.33	13.67	82.68	6.00	Discretionary
Pharaoh Ants Commercial	From	156.00	31.20	187.20	165.36	33.07	198.43	6.00	Discretionary
Bed Bugs Domestic		130.00	26.00	156.00	136.67	27.33	165.36	6.00	Discretionary
Bed Bugs Domestic Concessions		65.00	13.00	78.00	68.33	13.67	82.68	6.00	Discretionary
Bed Bugs Commercial	From	156.00	31.20	187.20	165.36	33.07	198.43	6.00	Discretionary
Fleas Domestic		104.00	20.80	125.00	108.16	21.63	132.50	6.00	Discretionary
Fleas Domestic Concessions		52.00	10.40	62.50	54.17	10.83	66.25	6.00	Discretionary
Fleas Commercial	From	125.00	25.00	150.00	132.50	26.50	159.00	6.00	Discretionary
Wasps Domestic		60.66	12.13	72.80	62.50	12.50	77.16	6.00	Discretionary
Wasps Domestic Concessions		52.00	10.40	62.40	54.17	10.83	66.14	5.99	Discretionary
Wasps Commercial	From	72.80	14.56	87.36	77.16	15.43	92.59	5.99	Discretionary

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GREEN SCENE		Charges 22/23			Proposed charges 23/24				
	UNIT	Basic (£)	VAT (£)	Total (£)	Basic (£)	VAT (£)	Total (£)	% Change	Basis for charging
Beetles Domestic		104.00	20.80	125.00	108.16	21.63	132.50	6.00	Discretionary
Beetles Domestic Concessions		52.00	10.40	62.50	54.17	10.83	66.25	6.00	Discretionary
Beetles Commercial	From	125.00	25.00	150.00	132.50	26.50	159.00	6.00	Discretionary
Garden Ants		104.00	20.80	125.00	108.16	21.63	132.50	6.00	Discretionary
Garden Ants Concessions		52.00	10.40	62.50	54.17	10.83	66.25	6.00	Discretionary
Garden Ants Commercial	From	125.00	25.00	150.00	132.50	26.50	159.00	6.00	Discretionary
Moths Domestic		104.00	20.80	125.00	108.16	21.63	132.50	6.00	Discretionary
Moths Domestic Concessions		52.00	10.40	62.50	54.17	10.83	66.25	6.00	Discretionary
Moths Commercial	From	125.00	25.00	150.00	132.50	26.50	159.00	6.00	Discretionary
Squirrels Domestic		156.00	31.20	187.20	162.50	32.50	198.43	6.00	Discretionary
Squirrels Commercial	From	187.20	37.44	224.64	198.43	39.69	238.12	6.00	Discretionary
Call Out Fee Domestic		60.66	12.13	72.80	65.00	13.00	77.16	6.00	Discretionary
Call Out Fee Commercial	From	72.80	14.56	87.36	77.16	15.43	92.59	5.99	Discretionary
One Of Sprays Domestic		104.00	20.80	125.00	108.16	21.63	132.50	6.00	Discretionary
One Of Sprays Commercial	From	125.00	25.00	150.00	132.50	26.50	159.00	6.00	Discretionary
Clinical Waste									Discretionary
Commercial Collections		54.40	10.88	65.28	60.00	12.00	72.00	10.29	Discretionary
£6.8 per Unit with minimum Collection fee of £54.4		6.80	1.36	8.16	7.50	1.50	9.00	10.29	Discretionary
Allotments									Discretionary
Sites without water	Per Rod	8.63	0.00	8.63	9.49	0.00	9.49	9.90	Discretionary
Sites with water	Per Rod	11.13	0.00	11.13	12.23	0.00	12.23	9.90	Discretionary

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

GREEN SCENE		Charges 22/23			Proposed charges 23/24				
	UNIT	Basic (£)	VAT (£)	Total (£)	Basic (£)	VAT (£)	Total (£)	% Change	Basis for charging
Sites with locker and toilet facilities	Per Rod	12.38	0.00	12.38	13.60	0.00	13.60	9.90	Discretionary
Sites with shed only	Per Rod	11.65	0.00	11.65	12.80	0.00	12.80	9.90	Discretionary
Nature Conservation									Discretionary
Birthday hire	per session	61.19	0.00	62.00	69.00	0.00	69.00	11.29	Discretionary
Corporate volunteering	per 10 people	196.03	0.00	197.00	217.00	0.00	217.00	10.15	Discretionary
Hire for LBL schools and academies	per hour	0.00	0.00	0.00	0.00	0.00	0.00	0.00	Discretionary
Long-term hire with Building (commercial education organisations in Lewisham)*	per hour	13.52	0.00	14.00	15.40	0.00	15.40	10.00	Discretionary
Long-term hire without Building (commercial education organisations in Lewisham)*	per hour	8.32	0.00	9.00	10.00	0.00	10.00	11.11	Discretionary
Occasional Hire with Building (commercial education organisations in Lewisham)	per hour	15.60	0.00	16.00	18.00	0.00	18.00	12.50	Discretionary
Occasional Hire without Building (commercial education organisations in Lewisham)	per hour	10.40	0.00	11.00	13.00	0.00	13.00	18.18	Discretionary
Occasional Hire with Building (non- LBL Schools/Academies/fee paying nurseries)	per hour	18.72	0.00	19.00	21.00	0.00	21.00	10.53	Discretionary

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GREEN SCENE	UNIT	Charges 22/23			Proposed charges 23/24			% Change	Basis for charging
		Basic (£)	VAT (£)	Total (£)	Basic (£)	VAT (£)	Total (£)		
Occasional Hire without Building (non-LBL Schools/Academies/fee paying nurseries)	per hour	15.60	0.00	16.00	18.00	0.00	18.00	12.50	Discretionary
Additional School sessions	per class	196.03	0.00	197.00	217.00	0.00	217.00	10.15	Discretionary
* Flexibility on the per hour price for long-term hire might be allowed if hirer provides additional social benefits for local community									
Outdoor hire in Beckenham Place Park									
Commercial events	per person	2.00	0.00	2.00	2.12	0.00	2.12	6.00	Discretionary
Community events	per person	1.00	0.00	1.00	1.06	0.00	1.06	6.00	Discretionary

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SERVICE: LICENSING

LICENSING	UNIT	Charges 22/23			Proposed charges 23/24				
		Basic (£)	VAT (£)	Total (£)	Basic (£)	VAT (£)	Total (£)	% Change	Basis for charging
1. Licensing Act									
1.1. Temporary Event Notice		21.0	0.0	21.0	21.0	0.0	21.0	0.0	Statutory
1.2 New Premises Licence Application		Variable	0.0		Variable	0.0		0.0	Statutory
1.3 Premises Licence - Transfer		23.0	0.0	23.0	23.0	0.0	23.0	0.0	Statutory
1.4 Premises Licence - Vary DPS		23.0	0.0	23.0	23.0	0.0	23.0	0.0	Statutory
1.5 Change name/address/copy licence		10.5	0.0	10.5	10.5	0.0	10.5	0.0	Statutory
1.6 Minor Variation		89.0	0.0	89.0	89.0	0.0	89.0	0.0	Statutory
1.7 Full Variation		Variable	0.0		Variable	0.0		0.0	Statutory
1.8 New Club Premises Certificate		Variable	0.0		Variable	0.0		0.0	Statutory
1.9 Interim Authority Notice		23.0	0.0	23.0	23.0	0.0	23.0	0.0	Statutory
1.10 Provisional Statement		315.0	0.0	315.0	315.0	0.0	315.0	0.0	Statutory
1.17 New Personal Licence		37.0	0.0	37.0	37.0	0.0	37.0	0.0	Statutory
1.19 Annual Fees		Variable	0.0		Variable	0.0		0.0	Statutory
2. GA05									Statutory
2.1 New Small Society Lottery		40.0	0.0	40.0	40.0	0.0	40.0	0.0	Statutory
2.2 Small Society Lottery Renewal		20.0	0.0	20.0	20.0	0.0	20.0	0.0	Statutory
2.3 Premises Licence Annual Fees		Variable	0.0		Variable	0.0		0.0	Statutory
Licensed Premises Gaming Machine Permits									
2.4 Notification of Gaming Machine Permit		50.00	0.00	50.00	50.00	0.00	50.00	0.0	Statutory
2.5 New GMP Application		Variable	0.00		Variable	0.00		0.0	Statutory
2.6 Variation of Permit		100.00	0.00	100.00	100.00	0.00	100.00	0.0	Statutory
2.7 Transfer of Permit		25.00	0.00	25.00	25.00	0.00	25.00	0.0	Statutory
2.8 Copy of Permit		15.00	0.00	15.00	15.00	0.00	15.00	0.0	Statutory
2.9 Annual Fee		50.00	0.00	50.00	50.00	0.00	50.00	0.0	Statutory

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LICENSING	UNIT	Charges 22/23			Proposed charges 23/24			% Change	Basis for charging
		Basic (£)	VAT (£)	Total (£)	Basic (£)	VAT (£)	Total (£)		
Club gaming machines & Club Gaming Permits									
2.10 Grant New Operator		200.00	0.00	200.00	200.00	0.00	200.00	0.0	Statutory
2.11 Variation of Permit		100.00	0.00	100.00	100.00	0.00	100.00	0.0	Statutory
2.12 Annual Fee		50.00	0.00	50.00	50.00	0.00	50.00	0.0	Statutory
2.13 Copy of Permit		15.00	0.00	15.00	15.00	0.00	15.00	0.0	Statutory
2.14 Transfer of Permit		50.00	0.00	50.00	50.00	0.00	50.00	0.0	Statutory
Prize Gaming Permit & Family Entertainment Centres									
2.15 Grant		300.00	0.00	300.00	300.00	0.00	300.00	0.0	Statutory
2.16 Renewal		300.00	0.00	300.00	300.00	0.00	300.00	0.0	Statutory
2.17 Transfer		25.00	0.00	25.00	25.00	0.00	25.00	0.0	Statutory
2.18 Copy of Permit		15.00	0.00	15.00	15.00	0.00	15.00	0.0	Statutory
Gambling Premises Licences									
Adult Gaming Centre									
2.19 Provisional Statement		2000.00	0.00	2000.00	2000.00	0.00	2000.00	0.0	Statutory
2.20 New Application		2000.00	0.00	2000.00	2000.00	0.00	2000.00	0.0	Statutory
2.21 Annual Fee		1000.00	0.00	1000.00	1000.00	0.00	1000.00	0.0	Statutory
2.22 Variation		1000.00	0.00	1000.00	1000.00	0.00	1000.00	0.0	Statutory
2.23 Transfer		1200.00	0.00	1200.00	1200.00	0.00	1200.00	0.0	Statutory
2.24 Re-instatement of Licence		1200.00	0.00	1200.00	1200.00	0.00	1200.00	0.0	Statutory
Betting Premises (Other)									
2.25 Provisional Statement		3000.00	0.00	3000.00	3000.00	0.00	3000.00	0.0	Statutory
2.26 New Application		3000.00	0.00	3000.00	3000.00	0.00	3000.00	0.0	Statutory
2.27 Annual Fee		600.00	0.00	600.00	600.00	0.00	600.00	0.0	Statutory
2.28 Variation		1500.00	0.00	1500.00	1500.00	0.00	1500.00	0.0	Statutory
2.29 Transfer		1200.00	0.00	1200.00	1200.00	0.00	1200.00	0.0	Statutory
2.30 Re-instatement of Licence		1200.00	0.00	1200.00	1200.00	0.00	1200.00	0.0	Statutory
Betting Premises (Track)									

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

LICENSING	UNIT	Charges 22/23			Proposed charges 23/24				
		Basic (£)	VAT (£)	Total (£)	Basic (£)	VAT (£)	Total (£)	% Change	Basis for charging
2.31 Provisional Statement		2500.00	0.00	2500.00	2500.00	0.00	2500.00	0.0	Statutory
2.32 New Application		2500.00	0.00	2500.00	2500.00	0.00	2500.00	0.0	Statutory
2.33 Annual Fee		1000.00	0.00	1000.00	1000.00	0.00	1000.00	0.0	Statutory
2.34 Variation		1250.00	0.00	1250.00	1250.00	0.00	1250.00	0.0	Statutory
2.35 Transfer		950.00	0.00	950.00	950.00	0.00	950.00	0.0	Statutory
2.36 Re-instatement of Licence		950.00	0.00	950.00	950.00	0.00	950.00	0.0	Statutory
Family Entertainment Centres									
2.37 Provisional Statement		2000.0	0.0	2000.0	2000.0	0.0	2000.0	0.0	Statutory
2.38 New Application		2000.0	0.0	2000.0	2000.0	0.0	2000.0	0.0	Statutory
2.39 Annual Fee		750.0	0.0	750.0	750.0	0.0	750.0	0.0	Statutory
2.40 Variation		1000.0	0.0	1000.0	1000.0	0.0	1000.0	0.0	Statutory
2.41 Transfer		950.0	0.0	950.0	950.0	0.0	950.0	0.0	Statutory
2.42 Re-instatement of Licence		950.0	0.0	950.0	950.0	0.0	950.0	0.0	Statutory
Bingo									
2.43 Provisional Statement		3500.0	0.0	3500.0	3500.0	0.0	3500.0	0.0	Statutory
2.44 New Application		3500.0	0.0	3500.0	3500.0	0.0	3500.0	0.0	Statutory
2.45 Annual Fee		1000.0	0.0	1000.0	1000.0	0.0	1000.0	0.0	Statutory
2.46 Variation		1750.0	0.0	1750.0	1750.0	0.0	1750.0	0.0	Statutory
2.47 Transfer		1200.0	0.0	1200.0	1200.0	0.0	1200.0	0.0	Statutory
2.48 Re-instatement of Licence		1200.0	0.0	1200.0	1200.0	0.0	1200.0	0.0	Statutory
Regional Casino									
2.49 Provisional Statement		15000.0	0.0	15000.0	15000.0	0.0	15000.0	0.0	Statutory
2.50 New Application		15000.0	0.0	15000.0	15000.0	0.0	15000.0	0.0	Statutory
2.51 Annual Fee		15000.0	0.0	15000.0	15000.0	0.0	15000.0	0.0	Statutory
2.52 Variation		7500.0	0.0	7500.0	7500.0	0.0	7500.0	0.0	Statutory
2.53 Transfer		6500.0	0.0	6500.0	6500.0	0.0	6500.0	0.0	Statutory
2.54 Re-instatement of Licence		6500.0	0.0	6500.0	6500.0	0.0	6500.0	0.0	Statutory
Large Casino									

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

LICENSING	UNIT	Charges 22/23			Proposed charges 23/24				
	UNIT	Basic (£)	VAT (£)	Total (£)	Basic (£)	VAT (£)	Total (£)	% Change	Basis for charging
2.55 Provisional Statement		10000.0	0.0	10000.0	10000.0	0.0	10000.0	0.0	Statutory
2.56 New Application		10000.0	0.0	10000.0	10000.0	0.0	10000.0	0.0	Statutory
2.57 Annual Fee		10000.0	0.0	10000.0	10000.0	0.0	10000.0	0.0	Statutory
2.58 Variation		5000.0	0.0	5000.0	5000.0	0.0	5000.0	0.0	Statutory
2.59 Transfer		2150.0	0.0	2150.0	2150.0	0.0	2150.0	0.0	Statutory
2.60 Re-instatement of Licence		2150.0	0.0	2150.0	2150.0	0.0	2150.0	0.0	Statutory
Small Casino									
2.61 Provisional Statement		8000.0	0.0	8000.0	8000.0	0.0	8000.0	0.0	Statutory
2.62 New Application		8000.0	0.0	8000.0	8000.0	0.0	8000.0	0.0	Statutory
2.63 Annual Fee		5000.0	0.0	5000.0	5000.0	0.0	5000.0	0.0	Statutory
2.64 Variation		4000.0	0.0	4000.0	4000.0	0.0	4000.0	0.0	Statutory
2.65 Transfer		1800.0	0.0	1800.0	1800.0	0.0	1800.0	0.0	Statutory
2.66 Re-instatement of Licence		1800.0	0.0	1800.0	1800.0	0.0	1800.0	0.0	Statutory
3. Animal Activity Licence									
3.1 Part A = Application Fee		229.0	0.0	229.0	229.0	0.0	229.0	0.0	Discretionary
3.2 Part B = Grant Fee		437.0	0.0	437.0	437.0	0.0	437.0	0.0	Discretionary
4. Dangerous Wild Animals									
4.1 New Application		273.0	0.0	273.0	273.0	0.0	273.0	0.0	Discretionary
4.2 Renewal		273.0	0.0	273.0	273.0	0.0	273.0	0.0	Discretionary
4.3 Copy of licence		10.5	0.0	10.5	10.5	0.0	10.5	0.0	Discretionary
6. Film Classifications									
6.1 New Film Classification	Per Hour	98.8	0.0	98.8	98.8	0.0	98.8	0.0	Discretionary
7. Hypnotism									
7.1 Hypnotism - New		88.4	0.0	88.4	88.4	0.0	88.4	0.0	Discretionary
8. Scrap Metal Licence - Site									
8.1 New Application		707.2	0.0	707.2	707.2	0.0	707.2	0.0	Discretionary

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

LICENSING	UNIT	Charges 22/23			Proposed charges 23/24				
		Basic (£)	VAT (£)	Total (£)	Basic (£)	VAT (£)	Total (£)	% Change	Basis for charging
8.2 Variation		291.2	0.0	291.2	291.2	0.0	291.2	0.0	Discretionary
8.3 Copy of Licence		10.9	0.0	10.9	10.9	0.0	10.9	0.0	Discretionary
8.4 Surrender		0.0	0.0	0.0	0.0	0.0	0.0	0.0	Discretionary
8.5 Transfer		291.2	0.0	291.2	291.2	0.0	291.2	0.0	Discretionary
Scrap Metal Licence - Collector									
8.6 New Application		353.6	0.0	353.6	353.6	0.0	353.6	0.0	Discretionary
8.7 Variation		291.2	0.0	291.2	291.2	0.0	291.2	0.0	Discretionary
8.8 Copy of Licence		10.9	0.0	10.9	10.9	0.0	10.9	0.0	Discretionary
Surrender		0.0	0.0	0.0	0.0	0.0	0.0	0.0	no fee
9. Marriages									
9.1 New Marriage Application		301.6	0.0	301.6	301.6	0.0	301.6	0.0	Discretionary
9.2 Marriage Renewal		301.6	0.0	301.6	301.6	0.0	301.6	0.0	Discretionary
9.3 Surrender		0.0	0.0	0.0	0.0	0.0	0.0	0.0	no fee
10. Sex Establishments									
10.1 Part A -New Application Fee		2628.1	0.0	2628.1	2628.1	0.0	2628.1	0.0	Discretionary
10.2 Part B - New Application Fee		1271.9	0.0	1271.9	1271.9	0.0	1271.9	0.0	Discretionary
10.3 Surrender		0.0	0.0	0.0	0.0	0.0	0.0	0.0	no fee
10.4 Part A Variation		788.3	0.0	788.3	788.3	0.0	788.3	0.0	Discretionary
10.5 Part B Variation		126.9	0.0	126.9	126.9	0.0	126.9	0.0	Discretionary
10.6 Transfer		416.0	0.0	416.0	416.0	0.0	416.0	0.0	Discretionary
Duplicate Copy		25.0	0.0	25.0	25.0	0.0	25.0	0.0	Discretionary
11. Fireworks - Health and Safety (Fees) Regulations 2016									
New Explosives Licence where a minimum separation distance of greater than 0 metres is prescribed									
1 Year Licence		192.4	0.0	192.4	192.4	0.0	192.4	0.0	Discretionary

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

LICENSING	UNIT	Charges 22/23			Proposed charges 23/24			% Change	Basis for charging
		Basic (£)	VAT (£)	Total (£)	Basic (£)	VAT (£)	Total (£)		
2 Year Licence		252.7	0.0	252.7	252.7	0.0	252.7	0.0	Discretionary
3 Licence		316.0	0.0	316.0	316.0	0.0	316.0	0.0	Discretionary
4 Year Licence		389.0	0.0	389.0	389.0	0.0	389.0	0.0	Discretionary
5 Year Licence		439.9	0.0	439.9	439.9	0.0	439.9	0.0	Discretionary
New Explosives Licence where no minimum separation distance or a 0 metres minimum separation distance is prescribed									
1 Year Licence		113.4	0.0	113.4	113.4	0.0	113.4	0.0	Discretionary
2 Year Licence		146.6	0.0	146.6	146.6	0.0	146.6	0.0	Discretionary
3 Licence		179.9	0.0	179.9	179.9	0.0	179.9	0.0	Discretionary
4 Year Licence		214.2	0.0	214.2	214.2	0.0	214.2	0.0	Discretionary
5 Year Licence		247.5	0.0	247.5	247.5	0.0	247.5	0.0	Discretionary
Renewal Explosives Licence where a minimum separation distance of greater than 0 metres is prescribed									
1 Year Licence		89.4	0.0	89.4	89.4	0.0	89.4	0.0	Discretionary
2 Year Licence		152.9	0.0	152.9	152.9	0.0	152.9	0.0	Discretionary
3 Licence		211.1	0.0	211.1	211.1	0.0	211.1	0.0	Discretionary
4 Year Licence		276.6	0.0	276.6	276.6	0.0	276.6	0.0	Discretionary
5 Year Licence		339.0	0.0	339.0	339.0	0.0	339.0	0.0	Discretionary
Renewal Explosives Licence where no minimum separation distance or a 0 metres minimum separation distance is prescribed									
1 Year Licence		56.2	0.0	56.2	56.2	0.0	56.2	0.0	Discretionary
2 Year Licence		89.4	0.0	89.4	89.4	0.0	89.4	0.0	Discretionary
3 Licence		124.8	0.0	124.8	124.8	0.0	124.8	0.0	Discretionary
4 Year Licence		158.1	0.0	158.1	158.1	0.0	158.1	0.0	Discretionary
5 Year Licence		192.4	0.0	192.4	192.4	0.0	192.4	0.0	Discretionary

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

LICENSING	UNIT	Charges 22/23			Proposed charges 23/24			% Change	Basis for charging
		Basic (£)	VAT (£)	Total (£)	Basic (£)	VAT (£)	Total (£)		
Change of name of licensee or address of site		37.4	0.0	37.4	37.4	0.0	37.4	0.0	Discretionary
Transfer		37.3	0.0	37.3	37.3	0.0	37.3	0.0	Discretionary
Duplicate Copy		37.4	0.0	37.4	37.4	0.0	37.4	0.0	Discretionary
New		0.0	100.0	0.0	0.0	100.0	0.0	0.0	Discretionary

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

SERVICE: TENNIS COURTS

TENNIS COURTS	UNIT	Charges 22/23			Proposed Charges 23/24			% Change	Basis for charging
		Basic (£)	VAT (£)	Total (£)	Basic (£)	VAT (£)	Total (£)		
Hire of tennis courts in parks (annual membership, providing free use of courts)		35.00	0.00	35.00	35.00	0.00	35.00	0.0	Discretionary
Hire of tennis courts in parks (Pay and play per hour -non-member)		5.00	0.00	5.00	5.00	0.00	5.00	0.0	Discretionary

- Additional £2 / hr for floodlights at Ladywell Fields.

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

SERVICE: LEISURE CENTRES

LEISURE CENTRES	UNIT	Charges 22/23			Proposed Charges 23/24			% Change	Basis for charging
		Basic (£)	VAT (£)	Total (£)	Basic (£)	VAT (£)	Total (£)		
1 Area Hire									
1.1 Community Hall (Schools, club/group, voluntary)		25.50	0.00	25.50	27.50	0.00	27.50	7.8	Discretionary
2 Creche									
2.1 Creche (per hour)		2.25	0.00	2.25	2.25	0.00	2.25	0.0	Discretionary
2.2 Creche (2 hours)		4.50	0.00	4.50	4.50	0.00	4.50	0.0	Discretionary
2.3 Creche (2nd child)		2.50	0.00	2.50	2.50	0.00	2.50	0.0	Discretionary
3 1Life Gym									
3.1 Be Active Gym Price		4.05	0.00	4.05	4.25	0.00	4.25	4.9	Discretionary
3.2 Junior Gym Price		3.45	0.00	3.45	3.65	0.00	3.65	5.8	Discretionary
3.3 Adult Gym Price		6.70	0.00	6.70	6.95	0.00	6.95	3.7	Discretionary
3.4 Be Active (Incl 60+) Gym Price		4.05	0.00	4.05	4.15	0.00	4.15	2.5	Discretionary
3.5 Junior / Be Active Induction Price		3.45	0.00	3.45	3.65	0.00	3.65	5.8	Discretionary
4 Group Exercise Classes									
4.1 Aerobics / Step etc		6.10	0.00	6.10	6.50	0.00	6.50	6.6	Discretionary
4.2 Aqua Zumba		6.10	0.00	6.10	6.50	0.00	6.50	6.6	Discretionary
4.3 Aqua Aerobics		6.10	0.00	6.10	6.50	0.00	6.50	6.6	Discretionary
4.4 GP referral aqua session		4.05	0.00	4.05	4.25	0.00	4.25	4.9	Discretionary
4.5 GP referral fitness class		4.05	0.00	4.05	4.25	0.00	4.25	4.9	Discretionary
4.6 GP referral gym session		4.05	0.00	4.05	4.25	0.00	4.25	4.9	Discretionary
5 Swimming									
5.1 Junior U16 Swim		3.10	0.00	3.10	3.30	0.00	3.30	6.5	Discretionary
5.2 Junior U16 holidays Swim - lewisham residents only in holiday		0.00	0.00	0.00	0.00	0.00	0.00		Discretionary
5.3 Adult Swim		4.25	0.00	4.25	4.50	0.00	4.50	5.9	Discretionary
5.4 Under 5's		0.00	0.00	0.00	0.00	0.00	0.00		Discretionary

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

LEISURE CENTRES		Charges 22/23			Proposed Charges 23/24				
	UNIT	Basic (£)	VAT (£)	Total (£)	Basic (£)	VAT (£)	Total (£)	% Change	Basis for charging
5.5 Family Swim		11.40	0.00	11.40	12.00	0.00	12.00	5.3	Discretionary
5.6 Be Active 60+ Swim Price		3.10	0.00	3.10	3.20	0.00	3.20	3.2	Discretionary
6 Main Pool Hire									
6.1 LBL Swim Club Main Pool		38.50	0.00	38.50	39.50	0.00	39.50	2.6	Discretionary
6.2 LBL Swim Club out of Main Pool		57.20	0.00	57.20	58.00	0.00	58.00	1.4	Discretionary
6.3 Non LBL Swim Club Main Pool		80.00	0.00	80.00	84.00	0.00	84.00	5.0	Discretionary
6.4 LBL Swim Club Teaching Pool		20.00	0.00	20.00	21.00	0.00	21.00	5.0	Discretionary
6.5 Non LBL Swim Club Teaching Pool		40.50	0.00	40.50	43.00	0.00	43.00	6.2	Discretionary
7 Swimming Lesson Direct Debits									
7.1 Junior Swimming lesson monthly DD - 50wks 45 minutes		37.35	0.00	37.35	39.00	0.00	39.00	4.4	Discretionary
7.2 Junior Swimming lesson monthly DD - 50wks 30 minutes		33.00	0.00	33.00	34.50	0.00	34.50	4.5	Discretionary
7.3 Adult Swimming lesson monthly DD - 50wks 30 minutes		33.00	0.00	33.00	34.50	0.00	34.50	4.5	Discretionary
7.4 Swim Adult 121 30 minute DD		87.50	0.00	87.50	89.99	0.00	89.99	2.8	Discretionary
7.5 Swim Adult 221 30 minute DD		65.60	0.00	65.60	67.99	0.00	67.99	3.6	Discretionary
7.6 Jnr 121 30 minute DD		87.50	0.00	87.50	89.99	0.00	89.99	2.8	Discretionary
7.7 Swim Jnr 221 30 minute DD		65.60	0.00	65.60	67.99	0.00	67.99	3.6	Discretionary
7.8 Swim Jnr 121 45 minute DD		157.50	0.00	157.50	160.00	0.00	160.00	1.6	Discretionary
8 BE ACTIVE - Subject to Criteria									
8.1 Be Active Full Membership		27.80	0.00	27.80	28.99	0.00	28.99	4.3	Discretionary
8.2 Be Active 60+ Swim Only Membership		15.00	0.00	15.00	15.75	0.00	15.75	5.0	Discretionary
8.3 Be Active 60+ Badminton		10.45	0.00	10.45	10.95	0.00	10.95	4.8	Discretionary
9 AstroTurf									
9.1 Astroturf With Flood Lights 7-aside		47.50	0.00	47.50	50.00	0.00	50.00	5.3	Discretionary

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

LEISURE CENTRES		Charges 22/23			Proposed Charges 23/24				
	UNIT	Basic (£)	VAT (£)	Total (£)	Basic (£)	VAT (£)	Total (£)	% Change	Basis for charging
9.2 Astroturf Without Flood Lights 7-aside		36.00	0.00	36.00	38.50	0.00	38.50	6.9	Discretionary
10 Badminton									
10.1 Badminton		14.50	0.00	14.50	15.50	0.00	15.50	6.9	Discretionary
11 Memberships									
11.1 Memberships Admin Fee		30.00	0.00	30.00	30.00	0.00	30.00	0.0	Discretionary
11.2 12 month direct debit membership Annual		349.90	0.00	349.90	359.90	0.00	359.90	2.9	Discretionary
11.3 Corporate membership		33.97	0.00	33.97	26.99	0.00	26.99	-20.5	Discretionary
11.4 1Life Plus Membership		29.99	0.00	29.99	30.99	0.00	30.99	3.3	Discretionary
11.5 In Centre Membership		34.99	0.00	34.99	35.99	0.00	35.99	2.9	Discretionary
11.6 Swim monthly ticket		19.99	0.00	19.99	21.99	0.00	21.99	10.0	Discretionary
11.7 Active 1 month Concession		27.00	0.00	27.00	28.35	0.00	28.35	5.0	Discretionary
11.8 Active 1 month Junior		20.00	0.00	20.00	21.00	0.00	21.00	5.0	Discretionary
11.9 Active 3 month GP Ref DD		20.00	0.00	20.00	20.99	0.00	20.99	4.9	Discretionary
12 Lowerfields									
12.1 Lower Fields 11 a side (90 minutes) hire		98.75	0.00	98.75	100.00	0.00	100.00	1.3	Discretionary
12.2 Mini Soccer (per game)		47.00	0.00	47.00	48.50	0.00	48.50	3.2	Discretionary
13 Trampoline & Mermaid Direct Debit									
13.1 Trampolining (45 min lesson) DD Monthly		23.50	0.00	23.50	24.99	0.00	24.99	6.3	Discretionary
Trampolining (60 min lesson) DD Monthly		30.00	0.00	30.00	31.50	0.00	31.50	5.0	Discretionary
Mermaid Swimming (45 min lesson) DD Monthly		36.20	0.00	36.20	38.00	0.00	38.00	5.0	Discretionary
14 Children Admissions Activities									
14.1 Soft play (60 mins)		3.20	0.00	3.20	3.45	0.00	3.45	7.8	Discretionary

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

LEISURE CENTRES		Charges 22/23			Proposed Charges 23/24				
	UNIT	Basic (£)	VAT (£)	Total (£)	Basic (£)	VAT (£)	Total (£)	% Change	Basis for charging
14.2 Pool inflatable session (60 mins)		4.00	0.00	4.00	4.35	0.00	4.35	8.7	Discretionary
14.3 Roller skating (60 mins)		4.00	0.00	4.00	4.25	0.00	4.25	6.3	Discretionary
15 Children's Parties									
15.3 Pool party (12 children)		133.60	0.00	133.60	145.00	0.00	145.00	8.5	Discretionary
15.4 Pool party (24 children) no inflatable		175.00	0.00	175.00	175.00	0.00	175.00	0.0	Discretionary
15.6 Mini activities party 3+ (12 children)		135.00	0.00	135.00	135.00	0.00	135.00	0.0	Discretionary
15.7 Roller skating party (20 children)		135.00	0.00	135.00	145.00	0.00	145.00	7.4	Discretionary
15.8 Bouncy Castle party (25 children)		135.00	0.00	135.00	145.00	0.00	145.00	7.4	Discretionary
15.9 Pool inflatable party (25 children)		150.00	0.00	150.00	220.00	0.00	220.00	46.7	Discretionary
15.10 Football party (15 children)		150.00	0.00	150.00	160.00	0.00	160.00	6.7	Discretionary
15.14 Additional hour after in own room		41.25	0.00	41.25	45.00	0.00	45.00	9.1	Discretionary
15.15 Additional hour after in café		25.70	0.00	25.70	28.00	0.00	28.00	8.9	Discretionary
16 Studio Area Hire									
16.2 Fitness Studio Hire		35.00	0.00	35.00	38.00	0.00	38.00	8.6	Discretionary
16.3 Multi-Purpose Studio Hire		28.30	0.00	28.30	31.00	0.00	31.00	9.5	Discretionary

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

SERVICE: COMMUNITY CENTRES

COMMUNITY CENTRES	UNIT	Charges 22/23			Proposed Charges 23/24			% Change	Basis for charging
		Basic (£)	VAT (£)	Total (£)	Basic (£)	VAT (£)	Total (£)		
Evelyn Community Centre (Main Hall) Mon-Fri		24.00	0.00	24.00	26.00	0.00	26.00	8.3	Discretionary
Evelyn Community Centre (Main Hall) Sat / Sun before 6pm		33.00	0.00	33.00	35.00	0.00	35.00	6.1	Discretionary
Evelyn Community Centre (Main Hall) Sat / Sun after 6pm		47.00	0.00	47.00	50.00	0.00	50.00	6.4	Discretionary
Evelyn Community Centre (Hairdressing room)		14.00	0.00	14.00	14.50	0.00	14.50	3.6	Discretionary
Honor Oak Community Centre Main Hall and garden		65.00	0.00	65.00	0.00	0.00	0.00	-100.0	Discretionary
Honor Oak Community Centre Main Hall, garden and lounge		87.00	0.00	87.00	0.00	0.00	0.00	-100.0	Discretionary
Honor Oak Community Centre lounge only		33.00	0.00	33.00	0.00	0.00	0.00	-100.0	Discretionary
Scotney Hall (Main Hall) Mon-Fri		20.00	0.00	20.00	22.00	0.00	22.00	10.0	Discretionary
Scotney Hall (Main Hall) Sat / Sun before 6pm		26.00	0.00	26.00	28.00	0.00	28.00	7.7	Discretionary
Scotney Hall (Main Hall) Sat / Sun after 6pm		37.00	0.00	37.00	40.00	0.00	40.00	8.1	Discretionary
(Concessionary rates – all sites)		15.00	0.00	15.00	16.50	0.00	16.50	10.0	Discretionary
(CIS rates – all sites		51.00	0.00	51.00	55.00	0.00	55.00	7.8	Discretionary
2. Leemore						0.00	#DIV/0!	Discretionary	
Lower Ground Hall VCS weekdays		34.00	0.00	34.00	36.00	0.00	36.00	5.9	Discretionary
Lower Ground Hall VCS evenings & weekends		37.00	0.00	37.00	40.00	0.00	40.00	8.1	Discretionary
Lower Ground Hall Commercial weekdays		37.00	0.00	37.00	40.00	0.00	40.00	8.1	Discretionary
Lower Ground Hall Commercial evenings & weekends		40.00	0.00	40.00	43.00	0.00	43.00	7.5	Discretionary
Hourly rate:		24.00	0.00	24.00	26.00	0.00	26.00	8.3	Discretionary

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

COMMUNITY CENTRES	UNIT	Charges 22/23			Proposed Charges 23/24			% Change	Basis for charging
		Basic (£)	VAT (£)	Total (£)	Basic (£)	VAT (£)	Total (£)		
Sat/Sun before 6pm:		33.00	0.00	33.00	35.00	0.00	35.00	6.1	Discretionary
Sat/Sun after 6pm:		48.00	0.00	48.00	52.00	0.00	52.00	8.3	Discretionary
Sat/Sun before 6pm		23.00	0.00	23.00	25.00	0.00	25.00	8.7	Discretionary
Sat/Sun after 6pm:		27.00	0.00	27.00	29.00	0.00	29.00	7.4	Discretionary
Hourly rate		20.00	0.00	20.00	22.00	0.00	22.00	10.0	Discretionary
Sat & Sun before 6pm per hour		26.00	0.00	26.00	28.00	0.00	28.00	7.7	Discretionary
Sat & Sun after 6pm per hour		37.00	0.00	37.00	40.00	0.00	40.00	8.1	Discretionary

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

SERVICE: LIBRARY AND INFORMATION SERVICE

LIBRARY AND INFORMATION SERVICE	UNIT	Charges 22/23			Proposed Charges 23/24			% Change	Basis for charging
		Basic (£)	VAT (£)	Total (£)	Basic (£)	VAT (£)	Total (£)		
1 Charges for specific loan services									
1.1 Hire of CDs		1.25	0.00	1.25	0.00	0.00	0.00	-100.0	Discretionary
1.2 Hire of DVDs		3.00	0.00	3.00	0.00	0.00	0.00	-100.0	Discretionary
2 Charges for overdue items									
2.1 Members aged 14-59	per day to max of 10	0.20	0.00	0.20	0.20	0.00	0.20	0.0	Discretionary
2.2. Members over 60	per day to max of 5	0.10	0.00	0.10	0.10	0.00	0.10	0.0	Discretionary
2.3 DVDs	Repeat hire fee per loan period to max of 18	3.00	0.00	3.00	3.00	0.00	3.00	0.0	Discretionary
3 Charges for lost items									
3.1 Lost stock	current cost of item +	5.00	0.00	5.00	5.00	0.00	5.00	0.0	Discretionary
3.2 Lost tickets		1.00	0.00	1.00	2.00	0.00	2.00	100.0	Discretionary
4 Charges for reserving specific items									
4.1 Standard reservations	per reservation	0.50	0.00	0.50	0.00	0.00	0.00	-100.0	Discretionary
4.2 Standard reservations - admin. Charge for non-collection	per reservation	0.50	0.50	0.50	1.00		1.00	100.0	Discretionary
4.3 British Library book reservations	per reservation	15.80	0.00	15.80	15.80	0.00	15.80	0.0	Discretionary
	+ additional				5.00		5.00		
4.4 British Library article reservations	per reservation, cost plus	15.80	0.00	15.80	15.80	0.00	15.80	0.0	Discretionary

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

LIBRARY AND INFORMATION SERVICE	UNIT	Charges 22/23			Proposed Charges 23/24			% Change	Basis for charging
		Basic (£)	VAT (£)	Total (£)	Basic (£)	VAT (£)	Total (£)		
	10p per page								
	+ additional				5.00		5.00		Discretionary
5 Other services									
5.1 Colour printing and copying A4	per sheet	0.50	0.00	0.50	0.50	0.00	0.50	0.0	Discretionary
5.2 Colour printing and copying A3	per sheet	1.00	0.00	1.00	1.00	0.00	1.00	0.0	Discretionary
5.3 Black and white printing and copying A4	per sheet	0.10	0.00	0.10	0.20	0.00	0.20	100.0	Discretionary
5.4 Black and white printing and copying A3	per sheet	0.15	0.00	0.15	0.30	0.00	0.30	100.0	Discretionary
6 Sales									Discretionary
6.1 Pen		0.20	0.00	0.20	0.50	0.00	0.50	150.0	Discretionary
6.2 Pencil		0.20	0.00	0.20	0.50	0.00	0.50	150.0	Discretionary
6.3 A4 plain paper		0.05	0.00	0.05	0.20	0.00	0.20	300.0	Discretionary
6.4 A3 plain paper		0.20	0.00	0.20	0.30	0.00	0.30	50.0	Discretionary
7 Room hire (commercial)*									
7.1 Lewisham Library	per hour	45.00	0.00	45.00	Paused	0.00	Paused	0.0	Discretionary
7.2 Deptford Lounge – Rm 1	per hour				20.00	0.00	20.00	NEW	Discretionary
7.2 Deptford Lounge – Rm 2	per hour				20.00	0.00	20.00	NEW	Discretionary
7.2 Deptford Lounge – Rm 1+2	per hour				40.00	0.00	40.00	NEW	Discretionary
7.3 Downham Library	per hour	17.00	0.00	17.00	20.00	0.00	20.00	17.6	Discretionary
7.4 Catford Library – Open pod	per hour				15.00	0.00	15.00	NEW	Discretionary
7.4 Catford Library – Closed pod	per hour				20.00	0.00	20.00	NEW	Discretionary
7.4 Catford Library – Rm 1	per hour				25.00	0.00	25.00	NEW	Discretionary
7.4 Catford Library – Rm 2	per hour				25.00	0.00	25.00	NEW	Discretionary
7.4 Catford Library – Rm 1+2	per hour				45.00	0.00	45.00	NEW	Discretionary
8 Local History and Archives									
Commercial reuse of images licensing									Discretionary

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

LIBRARY AND INFORMATION SERVICE	UNIT	Charges 22/23			Proposed Charges 23/24			% Change	Basis for charging
		Basic (£)	VAT (£)	Total (£)	Basic (£)	VAT (£)	Total (£)		
8.1 Commercial publication	Double for worldwide rights	20.00	0.00	20.00	20.00	0.00	20.00	0.0	Discretionary
8.2 Scholarly/non-profit publication		10.00	0.00	10.00	10.00	0.00	10.00	0.0	Discretionary
8.3 Commercial exhibition	Double for worldwide rights	40.00	0.00	40.00	40.00	0.00	40.00	0.0	Discretionary
8.4 Advertising		80.00	0.00	80.00	80.00	0.00	80.00	0.0	Discretionary
8.5 Merchandising	Double for worldwide rights	100.00	0.00	100.00	100.00	0.00	100.00	0.0	Discretionary
8.6 Commercial interior/exterior decoration	for up to 5 images	150.00	0.00	150.00	150.00	0.00	150.00	0.0	Discretionary
8.7 Film and television UK	for 5 years	60.00	0.00	60.00	60.00	0.00	60.00	0.0	Discretionary
8.8 Film and television additional years UK		30.00	0.00	30.00	30.00	0.00	30.00	0.0	Discretionary
8.9 Film and television worldwide rights		100.00	0.00	100.00	100.00	0.00	100.00	0.0	Discretionary
8.10 Film and television additional years worldwide rights		50.00	0.00	50.00	50.00	0.00	50.00	0.0	Discretionary
9 Local History and Archives other charges									
9.1 Microform printing		0.30	0.00	0.30	0.30	0.00	0.30	0.0	Discretionary
9.2 Copying Archive material A4		1.50	0.00	1.50	1.50	0.00	1.50	0.0	Discretionary
9.3 Copying Archive material A3		2.00	0.00	2.00	2.00	0.00	2.00	0.0	Discretionary
9.4 Scans 300dpi		5.00	0.00	5.00	5.00	0.00	5.00	0.0	Discretionary
9.5 Scans 600dpi		10.00	0.00	10.00	10.00	0.00	10.00	0.0	Discretionary
9.6 Photography permit		5.00	0.00	5.00	5.00	0.00	5.00	0.0	Discretionary

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

SERVICE: ADULT SOCIAL CARE

ADULT SOCIAL CARE	UNIT	Charges 22/23			Proposed Charges 23/24			% Change	Basis for charging
		Basic (£)	VAT (£)	Total (£)	Basic (£)	VAT (£)	Total (£)		
1. Non-Residential Charges									
1.1 non-residential unit cost	per hour	19.14	0.00	19.14	23.14	0.00	23.14	20.9	Discretionary
1.2 Brokerage cost	Annual charge	0.00	0.00	0.00	300.00	0.00	300.00		Discretionary

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

SERVICE: ADULT LEARNING

ADULT LEARNING	UNIT	Charges 22/23			Proposed Charges 23/24			% Change	Basis for charging
		Basic (£)	VAT (£)	Total (£)	Basic (£)	VAT (£)	Total (£)		
Community Learning course fees	per hour	6.50	0.00	6.50	7.00	0.00	7.00	7.7	Discretionary
Community Learning concessionary course fees	per hour	3.25	0.00	3.25	3.50	0.00	3.50	7.7	Discretionary
ALL café meal deal	meal deal	3.25	0.00	3.25	3.55	0.00	3.55	9.2	Traded
Tea	cup	1.00	0.00	1.00	1.10	0.00	1.10	10.0	Traded
Herbal Tea	cup	1.10	0.00	1.10	1.20	0.00	1.20	9.1	Traded
Coffee	cup	1.10	0.00	1.10	1.20	0.00	1.20	9.1	Traded
Filter Coffee	cup	1.40	0.00	1.40	1.55	0.00	1.55	10.7	Traded
Cappuccino	cup	1.40	0.00	1.40	1.55	0.00	1.55	10.7	Traded
Hot Chocolate	cup	1.40	0.00	1.40	1.55	0.00	1.55	10.7	Traded
Cuppa Soup	cup	1.10	0.00	1.10	1.20	0.00	1.20	9.1	Traded
Water	bottle	1.10	0.00	1.10	1.20	0.00	1.20	9.1	Traded
Can Drinks	can	1.00	0.00	1.00	1.10	0.00	1.10	10.0	Traded
Fruit Juices	Carton	1.00	0.00	1.00	1.10	0.00	1.10	10.0	Traded
Crisps	pack	0.75	0.00	0.75	0.80	0.00	0.80	6.7	Traded
Cereal Bars	pack	0.90	0.00	0.90	1.00	0.00	1.00	11.1	Traded
Chocolates	pack	0.90	0.00	0.90	1.00	0.00	1.00	11.1	Traded

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

ADULT LEARNING	UNIT	Charges 22/23			Proposed Charges 23/24			% Change	Basis for charging
		Basic (£)	VAT (£)	Total (£)	Basic (£)	VAT (£)	Total (£)		
Biscuits	pack	0.90	0.00	0.90	1.00	0.00	1.00	11.1	Traded
Cakes	unit	1.30	0.00	1.30	1.45	0.00	1.45	11.5	Traded

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

SERVICE: BEREAVEMENT

BEREAVEMENT	UNIT	Charges 22/23			Proposed Charges 23/24			% Change	Basis for charging
		Basic (£)	VAT (£)	Total (£)	Basic (£)	VAT (£)	Total (£)		
Private Graves, Grave Purchase Fee - Residents									
Woodland/ Lawn Grave non-border incl. 1st interment		4035.00	0.00	4035.00	4442.00	0.00	4442.00	10.1	Discretionary
Lawn Grave Border incl. 1st interment		4459.00	0.00	4459.00	4909.00	0.00	4909.00	10.1	Discretionary
Full Memorial non-border incl. 1st interment		4821.00	0.00	4821.00	5307.00	0.00	5307.00	10.1	Discretionary
Full Memorial Border incl. 1st interment		5205.00	0.00	5205.00	5629.00	0.00	5629.00	8.1	Discretionary
Grave for a Child or Cremated Remains		1248.00	0.00	1248.00	1374.00	0.00	1374.00	10.1	Discretionary
Burial Vault, Brockley Cemetery incl. Standard Memorial		5295.00	0.00	5295.00	5829.00	0.00	5829.00	10.1	Discretionary
Private Graves, Grave Purchase Fee - Non - Residents									
Woodland/ Lawn Grave non-border incl. 1st interment		11150.00	0.00	11150.00	12276.00	0.00	12276.00	10.1	Discretionary
Lawn Grave Border incl. 1st interment		12247.00	0.00	12247.00	13483.00	0.00	13483.00	10.1	Discretionary
Full Memorial non-border incl. 1st interment		13168.00	0.00	13168.00	14497.00	0.00	14497.00	10.1	Discretionary
Full Memorial Border incl. 1st interment		14160.00	0.00	14160.00	15590.00	0.00	15590.00	10.1	Discretionary
Grave for a Child or Cremated Remains		3586.00	0.00	3586.00	3948.00	0.00	3948.00	10.1	Discretionary
Burial Vault, Brockley Cemetery incl. Standard Memorial		7143.00	0.00	7143.00	7864.00	0.00	7864.00	10.1	Discretionary
Chambers & Sleeves									
Grave Sleeve		660.00	0.00	660.00	731.00	0.00	731.00	10.8	Discretionary
Chamber Grave - additional fee		770.00	0.00	770.00	Quote	0.00	Quote	Quote	Discretionary

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

BEREAVEMENT		Charges 22/23			Proposed Charges 23/24				
	UNIT	Basic (£)	VAT (£)	Total (£)	Basic (£)	VAT (£)	Total (£)	% Change	Basis for charging
Shroud Burial - additional fee		411.00	0.00	411.00	455.00	0.00	455.00	10.7	Discretionary
Chapel & Sundries									Discretionary
Use of Chapel		124.00	0.00	124.00	137.00	0.00	137.00	10.5	Discretionary
Use of Chapel - double time		248.00	0.00	248.00	275.00	0.00	275.00	10.9	Discretionary
Organist		78.00	0.00	78.00	86.00	0.00	86.00	10.3	Discretionary
Use of Organ		30.00	0.00	30.00	33.00	0.00	33.00	10.0	Discretionary
Transfer of Ownership/ Assignment (RoB with Probate))		72.00	0.00	72.00	79.00	0.00	79.00	9.7	Discretionary
Transfer of Ownership (RoB- No Probate)		90.00	0.00	90.00	130.00	0.00	130.00	44.4	Discretionary
Late/ overrun fee per 15 minutes		50.00	0.00	50.00	55.00	0.00	55.00	10.0	Discretionary
Digging/ Interment Fee - Private Graves - Residents									
Digging/ Interment Fee		1923.00	0.00	1923.00	2132.00	0.00	2132.00	10.9	Discretionary
Caskets & Large Coffins (2' 4" wide and over additional charge per ft)		108.00	0.00	108.00	119.00	0.00	119.00	10.2	Discretionary
Interment fee Cremated Remains		297.00	0.00	297.00	329.00	0.00	329.00	10.8	Discretionary
Interment fee Cremated Remains		457.00	0.00	457.00	506.00	0.00	506.00	10.7	Discretionary
Interment fee Cremated Remains		599.00	0.00	599.00	664.00	0.00	664.00	10.9	Discretionary
Saturday Burial Supplement		825.00	0.00	825.00	914.00	0.00	914.00	10.8	Discretionary
Sunday Burial Supplement		1100.00	0.00	1100.00	1219.00	0.00	1219.00	10.8	Discretionary
Saturday Burial Supplement with chapel		968.00	0.00	968.00	1073.00	0.00	1073.00	10.8	Discretionary
Sunday Burial Supplement with chapel		1243.00	0.00	1243.00	1378.00	0.00	1378.00	10.9	Discretionary
Digging/ Interment Fee - Private Graves - Non - Residents									
Digging/ Interment Fee		5716.00	0.00	5716.00	6339.00	0.00	6339.00	10.9	Discretionary

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

BEREAVEMENT		Charges 22/23			Proposed Charges 23/24				
	UNIT	Basic (£)	VAT (£)	Total (£)	Basic (£)	VAT (£)	Total (£)	% Change	Basis for charging
Caskets & Large Coffins (2' 4" wide and over additional charge per ft)		370.00	0.00	370.00	410.00	0.00	410.00	10.8	Discretionary
Interment fee Cremated Remains		855.00	0.00	855.00	948.00	0.00	948.00	10.9	Discretionary
Interment fee Cremated Remains		962.00	0.00	962.00	1066.00	0.00	1066.00	10.8	Discretionary
Interment fee Cremated Remains		1050.00	0.00	1050.00	1164.00	0.00	1164.00	10.9	Discretionary
Interment fee for a Child under 2 years of age		317.00	0.00	317.00	351.00	0.00	351.00	10.7	Discretionary
Interment fee for a Child Over 2 but Under 16 years		1666.00	0.00	1666.00	1847.00	0.00	1847.00	10.9	Discretionary
Saturday Burial Supplement		1650.00	0.00	1650.00	1829.00	0.00	1829.00	10.8	Discretionary
Sunday Burial Supplement		2200.00	0.00	2200.00	2439.00	0.00	2439.00	10.9	Discretionary
Saturday Burial Supplement with chapel		1900.00	0.00	1900.00	2107.00	0.00	2107.00	10.9	Discretionary
Sunday Burial Supplement with chapel		2480.00	0.00	2480.00	2750.00	0.00	2750.00	10.9	Discretionary
Memorial Fees - Residents									
Permit fee		320.00	0.00	320.00	354.00	0.00	354.00	10.6	Discretionary
Additional Inscription		91.00	0.00	91.00	100.00	0.00	100.00	9.9	Discretionary
Level/ Refix Memorial		33.00	0.00	33.00	0.00	0.00	0.00	-100.0	
Memorial Fees - Non - Residents									Discretionary
Permit fee		1168.00	0.00	1168.00	1295.00	0.00	1295.00	10.9	Discretionary
Additional Inscription		264.00	0.00	264.00	292.00	0.00	292.00	10.6	Discretionary
Level/ Refix Memorial		121.00	0.00	121.00	0.00	0.00	0.00	-100.0	Discretionary
Public Graves - Residents only									
Interment Fee		915.00	0.00	915.00	1014.00	0.00	1014.00	10.8	Discretionary
Memorial Fee		70.00	0.00	70.00	77.00	0.00	77.00	10.0	Discretionary
Exhumation Fee - Residents									
Exhumation		3599.00	0.00	3599.00	3991.00	0.00	3991.00	10.9	Discretionary

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

BEREAVEMENT		Charges 22/23			Proposed Charges 23/24				
	UNIT	Basic (£)	VAT (£)	Total (£)	Basic (£)	VAT (£)	Total (£)	% Change	Basis for charging
For each additional coffin removed		1185.00	0.00	1185.00	1314.00	0.00	1314.00	10.9	Discretionary
Exhumation Fee - Non - Residents									
Exhumation		11342.00	0.00	11342.00	12578.00	0.00	12578.00	10.9	Discretionary
For each additional coffin removed		3527.00	0.00	3527.00	3911.00	0.00	3911.00	10.9	Discretionary
Tree Planting (incl. cost of tree)									
Weekday		385.00	0.00	385.00	426.00	0.00	426.00	10.6	Discretionary
Saturday Morning (subject to staff availability)		495.00	0.00	495.00	548.00	0.00	548.00	10.7	Discretionary
Crematoria Fees									
Adult Mon-Fri		682.00	0.00	682.00	756.00	0.00	756.00	10.9	Discretionary
Adult Mon-Fri		825.00	0.00	825.00	914.00	0.00	914.00	10.8	Discretionary
Adult Mon-Fri		1106.00	0.00	1106.00	1226.00	0.00	1226.00	10.8	Discretionary
Adult Mon-Fri		1391.00	0.00	1391.00	1542.00	0.00	1542.00	10.9	Discretionary
Adult Mon-Thur		830.00	0.00	830.00	920.00	0.00	920.00	10.8	Discretionary
Witness Charge Supplement		20.00	0.00	20.00	22.00	0.00	22.00	10.0	Discretionary
Crematoria Fees - Residents Only									
Adult Direct Cremation (no service/use of chapel) Residents Only		420.00	0.00	420.00	375.00	0.00	375.00	-10.7	Discretionary
Adult - Saturday		1122.00	0.00	1122.00	1244.00	0.00	1244.00	10.9	Discretionary
Adult - Saturday Double time		1393.00	0.00	1393.00	1544.00	0.00	1544.00	10.8	Discretionary
Adult - Sunday		1497.00	0.00	1497.00	1660.00	0.00	1660.00	10.9	Discretionary
Adult Sunday - double time		1880.00	0.00	1880.00	2084.00	0.00	2084.00	10.9	Discretionary
Crematoria Fees - Non-Residents									
Adult - Saturday		1234.00	0.00	1234.00	1368.00	0.00	1368.00	10.9	Discretionary

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

BEREAVEMENT		Charges 22/23			Proposed Charges 23/24				
	UNIT	Basic (£)	VAT (£)	Total (£)	Basic (£)	VAT (£)	Total (£)	% Change	Basis for charging
Adult - Saturday Double time		1532.00	0.00	1532.00	1698.00	0.00	1698.00	10.8	Discretionary
Adult - Sunday		1646.00	0.00	1646.00	1825.00	0.00	1825.00	10.9	Discretionary
Adult Sunday - double time		2068.00	0.00	2068.00	2293.00	0.00	2293.00	10.9	Discretionary
NVF, Baby and Children's Services (Non-Residents)									
Foetus & Babies aged under 2 years		72.00	0.00	72.00	79.00	0.00	79.00	9.7	Discretionary
Child aged over 2 and Under 16 years		570.00	0.00	570.00	632.00	0.00	632.00	10.9	Discretionary
Organist Services and use of Organ									
Organist fee, weekday		78.00	0.00	78.00	86.00	0.00	86.00	10.3	Discretionary
Organist, weekday double time		135.00	0.00	135.00	149.00	0.00	149.00	10.4	Discretionary
Organist, Saturday		118.00	0.00	118.00	130.00	0.00	130.00	10.2	Discretionary
Organist, Saturday Double Time		160.00	0.00	160.00	177.00	0.00	177.00	10.6	Discretionary
Organist, Sunday		160.00	0.00	160.00	177.00	0.00	177.00	10.6	Discretionary
Organist, Sunday, Double Time		238.00	0.00	238.00	263.00	0.00	263.00	10.5	Discretionary
Use of Organ		28.00	0.00	28.00	31.00	0.00	31.00	10.7	Discretionary
Late or Over Run Service per 15 minutes		50.00	0.00	50.00	55.00	0.00	55.00	10.0	Discretionary
Miscellaneous									
Scattering of Cremated Remains from elsewhere		77.00	0.00	77.00	85.00	0.00	85.00	10.4	Discretionary
Customs or duplicate		36.00	0.00	36.00	39.00	0.00	39.00	8.3	Discretionary
Search Fee - up to 4 names		52.00	0.00	52.00	57.00	0.00	57.00	9.6	Discretionary
New Charges									
Cost of grave first top up added to interment fee					55.00				Discretionary

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

BEREAVEMENT	UNIT	Charges 22/23			Proposed Charges 23/24			% Change	Basis for charging
		Basic (£)	VAT (£)	Total (£)	Basic (£)	VAT (£)	Total (£)		
Hire of cemetery chapel for remembrance (none-staff attendance)	(£150 returned after inspection for damages)				600.00				Discretionary
Simplicity grave (reused public grave)					3000.00				Discretionary
Scattering from resident cremation	deducted from memorial purchase				50.00				Discretionary
Coffin drop-off					420.00				Discretionary
Simple Cremation					1143.40				Discretionary
Casket (metal) Environmental penalty charge					120.00				Discretionary
Memorial inspection upon request					90.00				Discretionary
Memorial repairs					10% administration added to contractors' quotation				Discretionary
Memorial take off for burial and put back after 1yr					250.00				Discretionary
new inscription					10% administration charge added to contractors quotation				Discretionary
Marking of grave for visit					30.00				Discretionary
Cremated remains holding fee (after 1 month)	per month				38.00				Discretionary

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

BEREAVEMENT	UNIT	Charges 22/23			Proposed Charges 23/24			% Change	Basis for charging
		Basic (£)	VAT (£)	Total (£)	Basic (£)	VAT (£)	Total (£)		
Administration fee for baby and stillborn services (recovered through CFF claim)					30.00				Discretionary
Automatic application for babys/stillborns name in the BoR unless family opt out	2 lines - applicants choice				80.00				Discretionary
Cleaning penalty charge					25.00				Discretionary

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

SERVICE: REGISTER OFFICE

REGISTER OFFICE	UNIT	Charges 22/23			Proposed Charges 23/24			% Change	Basis for charging
		Basic (£)	VAT (£)	Total (£)	Basic (£)	VAT (£)	Total (£)		
1. Birth, Death, Marriage, or Civil Partnership Certificates									
1.1 Standard Service (<i>Issued at time of registration or if requested later then processed within 15 working days - Fee includes 2nd class postage</i>									
1.1.1 Birth, death and marriage certificates		11.00		11.00	11.00	0.00	11.00	0.0	Statutory
1.1.2 Civil Partnership certificates		11.00		11.00	11.00	0.00	11.00	0.0	Statutory
1.2 Priority Service (<i>on or before next working day if order is received before 3pm) - Fee includes 2nd class postage</i>									
1.2.1 Birth, death and marriage certificates		11.00		11.00	11.00	0.00	11.00	0.0	Statutory
1.2.2 Civil Partnership certificates		11.00		11.00	11.00	0.00	11.00	0.0	Statutory
2. Fees for marriage and divorce									
2.1 Marriage by Superintendent Registrar's certificate									
2.1.1 Entry of each notice of marriage for persons subject to the Home Office Referral and Investigation Scheme		47.00	0.00	47.00	47.00	0.00	47.00	0.0	Statutory

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

REGISTER OFFICE	UNIT	Charges 22/23			Proposed Charges 23/24				
		Basic (£)	VAT (£)	Total (£)	Basic (£)	VAT (£)	Total (£)	% Change	Basis for charging
2.1.2 Entry of each notice of marriage for all other persons		35.00	0.00	35.00	35.00	0.00	35.00	0.0	Statutory
2.1.3 Consideration by Superintendent Registrar of a divorce obtained outside of the British Isles		50.00	0.00	50.00	50.00	0.00	50.00	0.0	Statutory
2.1.4 Consideration by the Registrar General of a divorce obtained outside of the British Isles		75.00	0.00	75.00	75.00	0.00	75.00	0.0	Statutory
2.2 Attendance at the ceremony									
2.2.1 At the register office		46.00	0.00	46.00	46.00	0.00	46.00	0.0	Statutory
2.2.2 At a registered building		46.00	0.00	46.00	86.00	0.00	46.00	0.0	Statutory
3. Fees for Civil Partnership									
3.1 Entry of each notice of civil partnership for persons subject to the Home Office Referral and Investigation Scheme		47.00	0.00	47.00	47.00	0.00	47.00	0.0	Statutory
3.2 Entry of each notice of civil partnerships for all other persons		35.00	0.00	35.00	35.00	0.00	35.00	0.0	Statutory
3.3 Consideration by the registration authority of a civil partnership dissolution obtained outside of the British Isles		50.00	0.00	50.00	50.00	0.00	50.00	0.0	Statutory

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

REGISTER OFFICE	UNIT	Charges 22/23			Proposed Charges 23/24			% Change	Basis for charging
		Basic (£)	VAT (£)	Total (£)	Basic (£)	VAT (£)	Total (£)		
3.4 Consideration by the Registrar General of a civil partnership dissolution obtained outside of the British Isles		75.00	0.00	75.00	75.00	0.00	75.00	0.0	Statutory
3.5 Atendance at civil partnership registration at the registrar office		46.00	0.00	46.00	46.00	0.00	46.00	0.0	Statutory
4. Fees for the conversion of a civil partnership into marriage									
4.1 Conversion of a civil partnership into marriage at the Register Office		45.00	0.00	45.00	45.00	0.00	45.00	0.0	Statutory
4.2 Two stage procedure on other premises									
4.2.2 Completing the declaration		27.00	0.00	27.00	27.00	0.00	27.00	0.0	Statutory
4.2.3 Signing the declaration in a religious building registered for the marriage of same sex couples		91.00	0.00	91.00	91.00	0.00	91.00	0.0	Statutory
5. Fees for changes to initial registration									
5.1 Change of forename within 12 months of birth registration		40.00	0.00	40.00	40.00	0.00	40.00	0.0	Statutory
5.2 Consideration by the Registrar / Superintendent Registrar of a correction		75.00	0.00	75.00	75.00	0.00	75.00	0.0	Statutory
5.3 Consideration by the Registrar General of a correction		90.00	0.00	90.00	90.00	0.00	90.00	0.0	Statutory

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

REGISTER OFFICE	UNIT	Charges 22/23			Proposed Charges 23/24			% Change	Basis for charging
		Basic (£)	VAT (£)	Total (£)	Basic (£)	VAT (£)	Total (£)		
6. Fees for searches in indexes									
6.1 Search in the indexes by the applicant personally for not more than six successive hours		18.00	0.00	18.00	18.00	0.00	18.00	0.0	Statutory
7. Postage									
7.1 Royal Mail special next day delivery by 1pm		0.00	0.00	10.00	10.00	0.00	10.00	0.0	Discretionary
7.2 Royal Mail 1st class signed for - Letter		Not available	0.00	Not available	2.50	0.00	2.50		Discretionary - New service for 2023/24
7.3 Royal Mail 1st class signed for - large letter		Not available	0.00	Not available	3.00	0.00	3.00		Discretionary - New service for 2023/24
8. Ceremonies									
8.1 The Evelyn Suite, 368 Lewisham High Street. Ceremonies taking place between 0900 and 1700									
8.1.1 Monday to Thursday		236.00	0.00	236.00	261.00	0.00	261.00	10.6	Discretionary (includes £46 statutory fee)
8.1.2 Friday		289.00	0.00	289.00	320.00	0.00	320.00	10.7	Discretionary (includes £46 statutory fee)
8.1.3 Saturday		343.00	0.00	343.00	380.00	0.00	380.00	10.8	Discretionary (includes £46 statutory fee)
8.2 The Evelyn Suite, 368 Lewisham High Street. Ceremonies taking place between 1700 and 2000									
8.2.1 Monday to Thursday		376.00	0.00	376.00	416.00	0.00	416.00	10.6	Discretionary (includes £46 statutory fee)

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

REGISTER OFFICE	UNIT	Charges 22/23			Proposed Charges 23/24				
	UNIT	Basic (£)	VAT (£)	Total (£)	Basic (£)	VAT (£)	Total (£)	% Change	Basis for charging
8.2.2 Friday		442.00	0.00	489.00	542.00	0.00	542.00	10.8	Discretionary (includes £46 statutory fee)
8.2.3 Saturday		603.00	0.00	603.00	668.00	0.00	668.00	10.8	Discretionary (includes £46 statutory fee)
8.3 All external venues. Ceremonies taking place between 0900 and 1700.									
8.3.1 Monday to Thursday		505.00	0.00	505.00	560.00	0.00	560.00	10.9	Discretionary (includes £46 statutory fee)
8.3.2 Friday		563.00	0.00	563.00	624.00	0.00	624.00	10.8	Discretionary (includes £46 statutory fee)
8.3.3 Saturday		706.00	0.00	706.00	782.00	0.00	782.00	10.8	Discretionary (includes £46 statutory fee)
8.3.4 Sunday / Bank Holiday		765.00	0.00	765.00	848.00	0.00	848.00	10.8	Discretionary (includes £46 statutory fee)
8.4 All external venues. Ceremonies taking place between 1700 and 2000.									
8.4.1 Monday to Thursday		577.00	0.00	577.00	639.00	0.00	639.00	10.7	Discretionary (includes £46 statutory fee)
8.4.2 Friday		624.00	0.00	624.00	692.00	0.00	692.00	10.9	Discretionary (includes £46 statutory fee)
8.4.3 Saturday		759.00	0.00	759.00	841.00	0.00	841.00	10.8	Discretionary (includes £46 statutory fee)

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

REGISTER OFFICE	UNIT	Charges 22/23			Proposed Charges 23/24			% Change	Basis for charging
		Basic (£)	VAT (£)	Total (£)	Basic (£)	VAT (£)	Total (£)		
8.4.4 Sunday / Bank Holiday		910.00	0.00	910.00	1009.00	0.00	1009.00	10.9	Discretionary (includes £46 statutory fee)
9. Private Citizenship Ceremony									
9.1 Monday- Friday		100	0.00	100	110.00	0.00	110.90	10	Discretionary

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

SERVICE: REVENUES

REVENUES	UNIT	Charges 22/23			Proposed Charges 23/24			% Change	Basis for charging
		Basic (£)	VAT (£)	Total (£)	Basic (£)	VAT (£)	Total (£)		
Summons application and liability order costs	per summons	172.50	0.00	172.50	172.50	0.00	172.50	0.0	Statutory
Blue Badge		10.00	0.00	10.00	11.00	0.00	11.00	10%	Discretionary
Freedom Pass		10.00	0.00	10.00	11.00	0.00	11.00	10%	Discretionary
CTAX Recovery		122.50	0.00	122.50	134.75	0.00	134.75	10%	Discretionary
NNDR Recovery		175.00	0.00	175.00	192.50	0.00	192.50	10%	Discretionary
Summons application cost	per summons	72.50	0.00	72.50	72.50	0.00	72.50	0.0	Statutory
Liability order cost	per liability order	50.00	0.00	50.00	50.00	0.00	50.00	0.0	Statutory
Notice of Enforcement (Compliance)	per case	75.00	0.00	75.00	75.00	0.00	75.00	0.0	Statutory
Enforcement Fee	upon a visit	235.00	0.00	235.00	235.00	0.00	235.00	0.0	Statutory
Sale or disposal Stage	upon goods levied	110.00	0.00	110.00	110.00	0.00	110.00	0.0	Statutory

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

SERVICE: STREET ENVIRONMENT SERVICE

STREET ENVIRONMENT SERVICE	UNIT	Charges 22/23			Proposed charges 23/24			% Change	Basis for charging
		Basic (£)	VAT (£)	Total (£)	Basic (£)	VAT (£)	Total (£)		
Written confirmation of address.	1	37.00	0.00	37.00	40.00	0.00	40.00	8.1	Discretionary
New street name	1	420.00	0.00	420.00	462.00	0.00	462.00	10.0	Discretionary
New multiple property numbering (e.g., block of flats)	1	58.00	0.00	58.00	63.00	0.00	63.00	8.6	Discretionary
New individual property number	1	58.00	0.00	58.00	63.00	0.00	63.00	8.6	Discretionary
New building name	1	420.00	0.00	420.00	462.00	0.00	462.00	10.0	Discretionary
Change of name or number for a single property	1	58.00	0.00	58.00	63.00	0.00	63.00	8.6	Discretionary
Change of name and number for multiple properties (e.g., block of flats)	1	13.00	0.00	13.00	14.00	0.00	14.00	7.7	Discretionary
Add a name to a numbered property	1	58.00	0.00	58.00	63.00	0.00	63.00	8.6	Discretionary

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

SERVICE: FORECOURT LICENSING

FORECOURT LICENSING	UNIT	Charges 22/23			Proposed charges 23/24			% Change	Basis for charging
		Basic (£)	VAT (£)	Total (£)	Basic (£)	VAT (£)	Total (£)		
Forecourt Licence Charges per Square Metre		6.05	0.00	6.05	6.66	0.00	6.66	10%	Discretionary
Forecourt Licence/ Renewal Fee		33.00	0.00	33.00	36.30	0.00	36.30	10%	Discretionary
Forecourt Licence Alteration Fee		33.00	0.00	33.00	36.30	0.00	36.30	10%	Discretionary
Forecourt Licence Replacement Fee		6.00	0.00	6.00	6.60	0.00	6.60	10%	Discretionary
Fast Track Forecourt Licence (48 HOURS)		60.00	0.00	60.00	66.00	0.00	66.00	10%	Discretionary
Arrears Letter		5.00	0.00	5.00	5.50	0.00	5.50	10%	Discretionary
Revocation Letter		10.00	0.00	10.00	11.00	0.00	11.00	10%	Discretionary

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

SERVICE: BUILDING CONTROL

BUILDING CONTROL	UNIT	Charges 22/23			Proposed charges 23/24			% Change	Basis for charging
		Basic (£)	VAT (£)	Total (£)	Basic (£)	VAT (£)	Total (£)		
Domestic Extensions - not more than 2 storeys high									
Floor area not exceeding 6m2		375.00	75.00	450.00	450.00	90.00	540.00	20.00%	Discretionary
6m2 and under 40m2		616.67	123.33	740.00	650.00	130.00	780.00	5.41%	Discretionary
40m2 and under 60m2		729.17	145.83	875.00	740.00	148.00	888.00	1.49%	Discretionary
Over 60m2 (Charged based on estimated cost of work)									
Domestic single family loft conversion									
Floor area not exceeding 6m2		433.33	86.67	520.00	550.00	110.00	660.00	26.92%	Discretionary
6m2 and under 40m2		645.83	129.17	775.00	650.00	130.00	780.00	0.65%	Discretionary
40m2 and under 60m2		779.17	155.83	935.00	795.00	159.00	954.00	2.03%	Discretionary
Over 60m2 (Charged based on estimated cost of work)									
Detached garages/outbuildings/carports									
Floor area not exceeding 30m2		483.33	96.67	580.00	595.00	119.00	714.00	23.10%	Discretionary
Floor area exceeding 30m2 BUT not exceeding 60m2		591.67	118.33	710.00	695.00	139.00	834.00	17.46%	Discretionary
Over 60m2 (Charged based on estimated cost of work)									
Window replacement (not competent persons)									
Estimated cost of work 0-2,000.00		129.17	25.83	155.00	195.00	39.00	234.00	50.97%	Discretionary
Estimated cost of work 2,000 - 10,000.00		183.33	36.67	220.00	250.00	50.00	300.00	36.36%	Discretionary
Over 10,000.00 (Charged by estimated cost of work)								#DIV/0!	Discretionary

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

BUILDING CONTROL	UNIT	Charges 22/23			Proposed charges 23/24			% Change	Basis for charging
		Basic (£)	VAT (£)	Total (£)	Basic (£)	VAT (£)	Total (£)		
Schedule 2 - Other Works								#DIV/0!	Discretionary
0-1,000		162.50	32.50	195.00	195.00	39.00	234.00	20.00%	Discretionary
1,001-2,000		245.83	49.17	295.00	295.00	59.00	354.00	20.00%	Discretionary
2,001-10,000		320.83	64.17	385.00	375.00	75.00	450.00	16.88%	Discretionary
10,001-11,000		391.67	78.33	470.00	407.33	81.47	488.80	4.00%	Discretionary
11,001-12,000		400.00	80.00	480.00	416.00	83.20	499.20	4.00%	Discretionary
12,001-13,000		412.50	82.50	495.00	429.00	85.80	514.80	4.00%	Discretionary
13,001-14,000		420.83	84.17	505.00	437.67	87.53	525.20	4.00%	Discretionary
14,001-15,000		437.50	87.50	525.00	455.00	91.00	546.00	4.00%	Discretionary
15,001-16,000		445.83	89.17	535.00	463.67	92.73	556.40	4.00%	Discretionary
16,001-17,000		462.50	92.50	555.00	481.00	96.20	577.20	4.00%	Discretionary
17,001-18,000		475.00	95.00	570.00	494.00	98.80	592.80	4.00%	Discretionary
18,001-19,000		483.33	96.67	580.00	502.67	100.53	603.20	4.00%	Discretionary
19,001-20,000		495.83	99.17	595.00	515.67	103.13	618.80	4.00%	Discretionary
20,001-21,000		504.17	100.83	605.00	524.33	104.87	629.20	4.00%	Discretionary
21,001-22,000		516.67	103.33	620.00	537.33	107.47	644.80	4.00%	Discretionary
22,001-23,000		525.00	105.00	630.00	546.00	109.20	655.20	4.00%	Discretionary
23,001-24,000		533.33	106.67	640.00	554.67	110.93	665.60	4.00%	Discretionary
24,001-25,000		545.83	109.17	655.00	567.67	113.53	681.20	4.00%	Discretionary
25,001-26,000		558.33	111.67	670.00	580.67	116.13	696.80	4.00%	Discretionary
26,001-27,000		566.67	113.33	680.00	589.33	117.87	707.20	4.00%	Discretionary
27,001-28,000		575.00	115.00	690.00	598.00	119.60	717.60	4.00%	Discretionary
28,001-29,000		583.33	116.67	700.00	606.67	121.33	728.00	4.00%	Discretionary
29,001-30,000		591.67	118.33	710.00	615.33	123.07	738.40	4.00%	Discretionary
30,001-31,000		604.17	120.83	725.00	628.33	125.67	754.00	4.00%	Discretionary
31,001-32,000		612.50	122.50	735.00	637.00	127.40	764.40	4.00%	Discretionary

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

BUILDING CONTROL	UNIT	Charges 22/23			Proposed charges 23/24			% Change	Basis for charging
		Basic (£)	VAT (£)	Total (£)	Basic (£)	VAT (£)	Total (£)		
32,001-33,000		625.00	125.00	750.00	650.00	130.00	780.00	4.00%	Discretionary
33,001-34,000		633.33	126.67	760.00	658.67	131.73	790.40	4.00%	Discretionary
34,001-35,000		645.83	129.17	775.00	671.67	134.33	806.00	4.00%	Discretionary
35,001-36,000		654.17	130.83	785.00	680.33	136.07	816.40	4.00%	Discretionary
36,001-37,000		666.67	133.33	800.00	693.33	138.67	832.00	4.00%	Discretionary
37,001-38,000		675.00	135.00	810.00	702.00	140.40	842.40	4.00%	Discretionary
38,001-39,000		687.50	137.50	825.00	715.00	143.00	858.00	4.00%	Discretionary
39,001-40,000		695.83	139.17	835.00	723.67	144.73	868.40	4.00%	Discretionary
40,001-41,000		708.33	141.67	850.00	736.67	147.33	884.00	4.00%	Discretionary
41,001-42,000		712.50	142.50	855.00	741.00	148.20	889.20	4.00%	Discretionary
42,001-43,000		725.00	145.00	870.00	754.00	150.80	904.80	4.00%	Discretionary
43,001-44,000		733.33	146.67	880.00	762.67	152.53	915.20	4.00%	Discretionary
44,001-45,000		745.83	149.17	895.00	775.67	155.13	930.80	4.00%	Discretionary
45,001-46,000		754.17	150.83	905.00	784.33	156.87	941.20	4.00%	Discretionary
46,001-47,000		766.67	153.33	920.00	797.33	159.47	956.80	4.00%	Discretionary
47,001-48,000		775.00	155.00	930.00	806.00	161.20	967.20	4.00%	Discretionary
48,001-49,000		787.50	157.50	945.00	819.00	163.80	982.80	4.00%	Discretionary
49-001-50,000		795.83	159.17	955.00	827.67	165.53	993.20	4.00%	Discretionary

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

SERVICE: PLANNING

PLANNING		Charges 22/23			Proposed charges 23/24				
	UNIT	Basic (£)	VAT (£)	Total (£)	Basic (£)	VAT (£)	Total (£)	% Change	Basis for charging
Operations:									
1. New Developments									
1.1 Outline Applications (calculated on site area)									
1.1.1 Not more than 2.5 hectares	per 0.1 hectare (or part thereof)	£462 per 0.1 hectare (or part thereof)	0.00	£462 per 0.1 hectare (or part thereof)	£462 per 0.1 hectare (or part thereof)	0.00	£462 per 0.1 hectare (or part thereof)	0.0	Statutory Fee
1.1.2 More than 2.5 hectares	per 0.1 hectare (or part thereof)	£11,432 plus an additional £138 per 0.1 hectare (or part thereof) in excess of 2.5 hectares up to a maximum of £150,000	0.00	£11,432 plus an additional £138 per 0.1 hectare (or part thereof) in excess of 2.5 hectares up to a maximum of £150,000	£11,432 plus an additional £138 per 0.1 hectare (or part thereof) in excess of 2.5 hectares up to a maximum of £150,000	0.00	£11,432 plus an additional £138 per 0.1 hectare (or part thereof) in excess of 2.5 hectares up to a maximum of £150,000	0.0	Statutory Fee
1.2 Full Applications (and First Submissions of Reserved Matters; or									

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

PLANNING		Charges 22/23			Proposed charges 23/24				
	UNIT	Basic (£)	VAT (£)	Total (£)	Basic (£)	VAT (£)	Total (£)	% Change	Basis for charging
Technical Details Consent)									
1.2.1 The erection of new dwellinghouses; including the building of new flats; (Total number of new units created is 50 or less)	Per dwelling house	£462 per dwellinghouse / flat	0.00	£462 per dwellinghouse / flat	£462 per dwellinghouse / flat	0.00	£462 per dwellinghouse / flat	0.0	Statutory Fee
1.2.2 Erection of new dwellinghouses; including the building of new flats; (Total number of new units created is more than 50)	Per dwellinghouse	£22,859 plus £138 per additional dwellinghouse / flat in excess of 50 up to a maximum of £300,000	0.00	£22,859 plus £138 per additional dwellinghouse / flat in excess of 50 up to a maximum of £300,000	£22,859 plus £138 per additional dwellinghouse / flat in excess of 50 up to a maximum of £300,000	0.00	£22,859 plus £138 per additional dwellinghouse / flat in excess of 50 up to a maximum of £300,000	0.0	Statutory Fee
1.2.3 Erection of buildings (not dwellinghouses, agricultural, glasshouses, plant nor machinery); where there is no gross floor space created by the development		£234.00	0.00	£234.00	£234.00	0.00	£234.00	0.0	Statutory Fee
1.2.4 Erection of buildings (not dwellinghouses, agricultural,		£234.00	0.00	£234.00	£234.00	0.00	£234.00	0.0	Statutory Fee

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

PLANNING	UNIT	Charges 22/23			Proposed charges 23/24			% Change	Basis for charging
		Basic (£)	VAT (£)	Total (£)	Basic (£)	VAT (£)	Total (£)		
glasshouses, plant nor machinery); where the gross floor space created by the development does not exceed 40 sq m									
1.2.5 Erection of buildings (not dwellinghouses, agricultural, glasshouses, plant nor machinery); where the gross floor space created by the development exceeds 40 sq m, but does not exceed 75 sq m		£462.00	0.00	£462.00	£462.00	0.00	£462.00	0.0	Statutory Fee
1.2.6 Erection of buildings (not dwellinghouses, agricultural, glasshouses, plant nor machinery); where the gross floor space created by the development exceeds 75 sq m, but does not exceed 3,750 sq m	75 sq m (or part thereof)	£462.00	0.00	£462.00	£462.00	0.00	£462.00	0.0	Statutory Fee

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

PLANNING		Charges 22/23			Proposed charges 23/24				
	UNIT	Basic (£)	VAT (£)	Total (£)	Basic (£)	VAT (£)	Total (£)	% Change	Basis for charging
1.2.7 Erection of buildings (not dwellinghouses, agricultural, glasshouses, plant nor machinery); where the gross floor space created by the development exceeds 3,750 sq m	75 sq m (or part thereof)	£22,859 plus £138 for each additional 75 sq m (or part thereof) in excess of 3,750 sq m up to a maximum on £300,000	0.00	£22,859 plus £138 for each additional 75 sq m (or part thereof) in excess of 3,750 sq m up to a maximum on £300,000	£22,859 plus £138 for each additional 75 sq m (or part thereof) in excess of 3,750 sq m up to a maximum on £300,000	0.00	£22,859 plus £138 for each additional 75 sq m (or part thereof) in excess of 3,750 sq m up to a maximum on £300,000	0.0	Statutory Fee
1.2.8 Erection of agricultural buildings other than glasshouses on land used for agricultural purposes; where the gross floor space to be created by the development does not exceed 465 sq m		£96.00	0.00	£96.00	£96.00	0.00	£96.00	0.0	Statutory Fee
1.2.9 Erection of agricultural buildings other than glasshouses on land used for agricultural purposes; where the gross floor space to be created by the development exceeds 465 sq m but does not exceed 540 sq m		£462.00	0.00	£462.00	£462.00	0.00	£462.00	0.0	Statutory Fee

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

PLANNING		Charges 22/23			Proposed charges 23/24				
	UNIT	Basic (£)	VAT (£)	Total (£)	Basic (£)	VAT (£)	Total (£)	% Change	Basis for charging
1.2.10 Erection of agricultural buildings other than glasshouses on land used for agricultural purposes; where the gross floor space to be created by the development exceeds 540 sq m but does not exceed 4215 sq m	75 sq m (or part thereof)	£462 for first 540 sq m plus £462 for each 75 sq m (or part thereof) in excess of 540 sq m	0.00	£462 for first 540 sq m plus £462 for each 75 sq m (or part thereof) in excess of 540 sq m	£462 for first 540 sq m plus £462 for each 75 sq m (or part thereof) in excess of 540 sq m	0.00	£462 for first 540 sq m plus £462 for each 75 sq m (or part thereof) in excess of 540 sq m	0.0	Statutory Fee
1.2.11 Erection of agricultural buildings other than glasshouses on land used for agricultural purposes; where the gross floor space to be created by the development exceeds 4,215 sq m	75 sq m (or part thereof)	£22,859 plus £138 for each additional 75 sq m (or part thereof) in excess of 4,215 sq m up to a maximum of £300,000	0.00	£22,859 plus £138 for each additional 75 sq m (or part thereof) in excess of 4,215 sq m up to a maximum of £300,000	£22,859 plus £138 for each additional 75 sq m (or part thereof) in excess of 4,215 sq m up to a maximum of £300,000	0.00	£22,859 plus £138 for each additional 75 sq m (or part thereof) in excess of 4,215 sq m up to a maximum of £300,000	0.0	Statutory Fee
1.2.12 Erection of glasshouses on land used for the purpose of agriculture; where the gross floor space to be created by the development does not exceed 465 sq m		£96.00	0.00	£96.00	£96.00	0.00	£96.00	0.0	Statutory Fee

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

PLANNING		Charges 22/23			Proposed charges 23/24				
	UNIT	Basic (£)	VAT (£)	Total (£)	Basic (£)	VAT (£)	Total (£)	% Change	Basis for charging
1.2.13 Erection of glasshouses on land used for the purpose of agriculture; where the gross floor space to be created by the development exceeds 465 sq m		£2,580.00	0.00	£2,580.00	£2,580.00	0.00	£2,580.00	0.0	Statutory Fee
1.2.14 Erection / alterations / replacement of plant and machinery where the site area does not exceed 5 hectares	per 0.1 hectare (or part thereof)	£462 per 0.1 hectare (or part thereof)	0.00	£462 per 0.1 hectare (or part thereof)	£462 per 0.1 hectare (or part thereof)	0.00	£462 per 0.1 hectare (or part thereof)	0.0	Statutory Fee
1.2.15 Erection / alterations / replacement of plant and machinery where the site area exceeds 5 hectares	per 0.1 hectare (or part thereof)	£22,859 plus £138 for each additional 0.1 hectare (or part thereof) in excess of 5 hectares up to a maximum of £300,000	0.00	£22,859 plus £138 for each additional 0.1 hectare (or part thereof) in excess of 5 hectares up to a maximum of £300,000	£22,859 plus £138 for each additional 0.1 hectare (or part thereof) in excess of 5 hectares up to a maximum of £300,000	0.00	£22,859 plus £138 for each additional 0.1 hectare (or part thereof) in excess of 5 hectares up to a maximum of £300,000	0.0	Statutory Fee

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

PLANNING		Charges 22/23			Proposed charges 23/24				
	UNIT	Basic (£)	VAT (£)	Total (£)	Basic (£)	VAT (£)	Total (£)	% Change	Basis for charging
1.2.16 Resubmission within 12 months of the decision (or within 12 months of submitting an application that is subsequently withdrawn), where the applicant, the address (or site location) is the same as that for the previous application and the description of the resubmission is similar to that of the previous application.		0	0.00	0	0	0.00	0	0.0	Statutory Fee
2. Reserved Matters									
2.1 Application for approval of reserved matters following outline approval. If a sum equal to or greater than what would be payable at current rates for approval of all the reserved matters has already been paid		£462.00	0.00	£462.00	£462.00	0.00	£462.00	0.0	Statutory Fee
2.2 Application for approval of reserved matters following outline approval. If a sum equal to or greater than what would be payable at current rates for approval		Fee will the same as Full fee for that use carried out or operation	0.00	Fee will the same as Full fee for that use carried out or operation	Fee will the same as Full fee for that use carried out or operation	0.00	Fee will the same as Full fee for that use carried	0.0	Statutory Fee

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

PLANNING	UNIT	Charges 22/23			Proposed charges 23/24			% Change	Basis for charging
		Basic (£)	VAT (£)	Total (£)	Basic (£)	VAT (£)	Total (£)		
of all the reserved matters has NOT already been paid								out or operation	
2.3 Resubmission within 12 months of the decision (or within 12 months of submitting an application that is subsequently withdrawn), where the applicant, the address (or site location) is the same as that for the previous application and the description of the resubmission is similar to that of the previous application.		0	0.00	0	0	0.00	0	0.0	Statutory Fee
3. Existing Dwellinghouses or Flats									
3.1 Enlargement, improvement or other alteration of an existing single dwellinghouse or single flat		£206.00	0.00	£206.00	£206.00	0.00	£206.00	0.0	Statutory Fee
3.2 Enlargement, improvement or other alteration of existing		£407.00	0.00	£407.00	£407.00	0.00	£407.00	0.0	

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

PLANNING	UNIT	Charges 22/23			Proposed charges 23/24			% Change	Basis for charging
		Basic (£)	VAT (£)	Total (£)	Basic (£)	VAT (£)	Total (£)		
dwellinghouses or flats (two or more)									
3.3 The carrying out of operations within the curtilage of an existing dwellinghouse, for purposes ancillary to the enjoyment of the dwellinghouse									
Erection of a building, outhouse, workshop, large shed etc.		£206.00	0.00	£206.00	£206.00	0.00	£206.00	0.0	Statutory Fee
Erection or construction of gates, fences, walls or other means of enclosure along a boundary of the curtilage of an existing dwellinghouse		£206.00	0.00	£206.00	£206.00	0.00	£206.00	0.0	Statutory Fee
Enlargement, improvement or other alteration of an existing single dwellinghouse or single flat specifically for the benefit of a registered disable person		£0.00	0.00	£0.00	£0.00	0.00	£0.00	0.0	Statutory Fee
3.4 Resubmission within 12 months of the decision (or within 12 months of submitting an application that is subsequently withdrawn), where the		0.0	0	0.00	0	0.00	0.0	0.0	Statutory Fee

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

PLANNING	UNIT	Charges 22/23			Proposed charges 23/24			% Change	Basis for charging
		Basic (£)	VAT (£)	Total (£)	Basic (£)	VAT (£)	Total (£)		
applicant, the address (or site location) is the same as that for the previous application and the description of the resubmission is similar to that of the previous application.									
4. Applications other than Building Works									
4.1.The construction of car parks, service roads or other accesses, including cross overs / drop curbs for existing uses	per 0.1 hectare (or part thereof)	£234.00	0.00	£234.00	£234.00	0.00	£234.00	0.0	Statutory Fee
4.2 Waste (Use of land for disposal of refuse or waste materials or deposit of material remaining after extraction of storage of minerals); where the site area does not exceed 15 hectares	per 0.1 hectare (or part thereof)	£234 for each 0.1 hectare (or part thereof)	0.00	£234 for each 0.1 hectare (or part thereof)	£234 for each 0.1 hectare (or part thereof)	0.00	£234 for each 0.1 hectare (or part thereof)	0.0	Statutory Fee

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

PLANNING		Charges 22/23			Proposed charges 23/24				
	UNIT	Basic (£)	VAT (£)	Total (£)	Basic (£)	VAT (£)	Total (£)	% Change	Basis for charging
4.3 Waste (Use of land for disposal of refuse or waste materials or deposit of material remaining after extraction of storage of minerals); where the site area exceeds 15 hectares		£34,934 plus £138 for each additional 0.1 hectare (or part thereof) in excess of 15 hectares up to a maximum of £78,000	0.00	£34,934 plus £138 for each additional 0.1 hectare (or part thereof) in excess of 15 hectares up to a maximum of £78,000	£34,934 plus £138 for each additional 0.1 hectare (or part thereof) in excess of 15 hectares up to a maximum of £78,000	0.00	£34,934 plus £138 for each additional 0.1 hectare (or part thereof) in excess of 15 hectares up to a maximum of £78,000	0.0	Statutory Fee
5. Drilling / Mining Operations	per 0.1 hectare (or part thereof)								
5.1 Operations connected with exploratory drilling for oil or natural gas; where the site area does not exceed 7.5 hectares	per 0.1 hectare (or part thereof)	£508 for each 0.1 hectare (or part thereof)	0.00	£508 for each 0.1 hectare (or part thereof)	£508 for each 0.1 hectare (or part thereof)	0.00	£508 for each 0.1 hectare (or part thereof)	0.0	Statutory Fee

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

PLANNING		Charges 22/23			Proposed charges 23/24				
	UNIT	Basic (£)	VAT (£)	Total (£)	Basic (£)	VAT (£)	Total (£)	% Change	Basis for charging
5.2 Operations connected with exploratory drilling for oil or natural gas; where the site area exceeds 7.5 hectares	per 0.1 hectare (or part thereof)	£38,070 plus £151 for each additional 0.1 hectare (or part thereof) in excess of 7.5 hectares up to a maximum of £300,000	0.00	£38,070 plus £151 for each additional 0.1 hectare (or part thereof) in excess of 7.5 hectares up to a maximum of £300,000	£38,070 plus £151 for each additional 0.1 hectare (or part thereof) in excess of 7.5 hectares up to a maximum of £300,000	0.00	£38,070 plus £151 for each additional 0.1 hectare (or part thereof) in excess of 7.5 hectares up to a maximum of £300,000	0.0	Statutory Fee
5.3 Operations (other than exploratory drilling) for the winning and working of oil or natural gas; where the site area does not exceed 15 hectares	per 0.1 hectare (or part thereof)	£257 per 0.1 hectare (or part thereof)	0.00	£257 per 0.1 hectare (or part thereof)	£257 per 0.1 hectare (or part thereof)	0.00	£257 per 0.1 hectare (or part thereof)	0.0	Statutory Fee
5.4 Operations (other than exploratory drilling) for the winning and working of oil or natural gas; where the site area exceeds 15 hectares	per 0.1 hectare (or part thereof)	£38,520 plus £151 for each additional 0.1 hectare (or part thereof) in excess of 15 hectares up to a maximum of £78,000	0.00	£38,520 plus £151 for each additional 0.1 hectare (or part thereof) in excess of 15 hectares up to a maximum of £78,000	£38,520 plus £151 for each additional 0.1 hectare (or part thereof) in excess of 15 hectares up to a maximum of £78,000	0.00	£38,520 plus £151 for each additional 0.1 hectare (or part thereof) in excess of 15 hectares up to a maximum of £78,000	0.0	Statutory Fee

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

PLANNING		Charges 22/23			Proposed charges 23/24				
	UNIT	Basic (£)	VAT (£)	Total (£)	Basic (£)	VAT (£)	Total (£)	% Change	Basis for charging
		maximum of £78,000					up to a maximum of £78,000		
5.5 Other operations (winning and working of minerals) excluding oil and natural gas; where the site area does not exceed 15 hectares	per 0.1 hectare (or part thereof)	£234 per 0.1 hectare (or part thereof)	0.00	£234 per 0.1 hectare (or part thereof)	£234 per 0.1 hectare (or part thereof)	0.00	£234 per 0.1 hectare (or part thereof)	0.0	Statutory Fee
5.6 Other operations (winning and working of minerals) excluding oil and natural gas; where the site area exceeds 15 hectares	per 0.1 hectare (or part thereof)	£34,934 plus £138 for each additional 0.1 hectare (or part thereof) in excess of 15 hectares up to a maximum of £78,000	0.00	£34,934 plus £138 for each additional 0.1 hectare (or part thereof) in excess of 15 hectares up to a maximum of £78,000	£34,934 plus £138 for each additional 0.1 hectare (or part thereof) in excess of 15 hectares up to a maximum of £78,000	0.00	£34,934 plus £138 for each additional 0.1 hectare (or part thereof) in excess of 15 hectares up to a maximum of £78,000	0.0	Statutory Fee

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

PLANNING		Charges 22/23			Proposed charges 23/24				
	UNIT	Basic (£)	VAT (£)	Total (£)	Basic (£)	VAT (£)	Total (£)	% Change	Basis for charging
5.7 Other operations (not coming within any of the above categories) (calculated on site area)		£234 per 0.1 hectare (or part thereof) up to a maximum of £2,028	0.00	£234 per 0.1 hectare (or part thereof) up to a maximum of £2,028	£234 per 0.1 hectare (or part thereof) up to a maximum of £2,028	0.00	£234 per 0.1 hectare (or part thereof) up to a maximum of £2,028	0.0	Statutory Fee
6. Lawful Development Certificate									
6.1 Lawful Development Certificate Existing (Section 191 (1) (a) or (b) application for a certificate to establish the lawfulness of an existing land-use, or of development already carried out		Fee will the same as Full fee for that use carried out or operation	0.00	Fee will the same as Full fee for that use carried out or operation	Fee will the same as Full fee for that use carried out or operation	0.00	Fee will the same as Full fee for that use carried out or operation	0.0	Statutory Fee
6.2 Lawful Development Certificate Existing (Section 191 (1) (a) or (b) application for a certificate to establish the lawfulness of an existing land-use, or of development already carried out. Application for planning permission for the same development would be exempt from the need to pay a planning fee under		0.00	0.00	0.00	0.00	0.00	0.00	0.0	Statutory Fee

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

PLANNING	UNIT	Charges 22/23			Proposed charges 23/24				
		Basic (£)	VAT (£)	Total (£)	Basic (£)	VAT (£)	Total (£)	% Change	Basis for charging
any other planning fee regulation.									
6.3 Lawful Development Certificate - Lawful not to comply with a particular planning condition. (Section 191 (1) (c) application for a certificate to establish that it was lawful not to comply with a particular condition or other limitation imposed on a planning permission.		£234.00	0.00	£234.00	£234.00	0.00	£234.00	0.0	Statutory Fee
6.4 Lawful Development Certificate - Proposed (Section 192 application for a certificate to state that a proposed use would be lawful.		Fee will be half the normal planning fee if submitting a new application for that use or operation	0.00	Fee will be half the normal planning fee if submitting a new application for that use or operation	Fee will be half the normal planning fee if submitting a new application for that use or operation	0.00	Fee will be half the normal planning fee if submitting a new application for that use or operation	0.0	Statutory Fee
6.5 Certificate of Lawfulness of Proposed Works to a listed building		0.0	0.00	0.00	0.00	0.00	0.0	0.0	Statutory Fee

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

PLANNING		Charges 22/23			Proposed charges 23/24				
	UNIT	Basic (£)	VAT (£)	Total (£)	Basic (£)	VAT (£)	Total (£)	% Change	Basis for charging
7. Prior Approval									
7.1 Prior approval for permitted development rights for a larger single story home extension (From 19 August 2019)		£96.00	0.00	£96.00	£96.00	0.00	£96.00	0.0	Statutory Fee
7.2 Agricultural and Forestry buildings and operations		£96.00	0.00	£96.00	£96.00	0.00	£96.00	0.0	Statutory Fee
7.3 Demolition of buildings		£96.00	0.00	£96.00	£96.00	0.00	£96.00	0.0	Statutory Fee
7.4 Communications (previously referred to as "Telecommunications Code Systems Operators")		£462.00	0.00	£462.00	£462.00	0.00	£462.00	0.0	Statutory Fee
7.5 Change of Use from Commercial/Business/Service (Use Class E), or Betting Office or Pay Day Loan Shop to mixed use including up to two flats (Use Class C3) (From 1/8/21)		£96.00	0.00	£96.00	£96.00	0.00	£96.00	0.0	Statutory Fee
7.6 Change of Use of a building and any land within its curtilage from Commercial/Business/Service (Use Class E), Hotels (Use Class C1), Residential Institutions (Use Class C2), Secure		£96.00	0.00	£96.00	£96.00	0.00	£96.00	0.0	Statutory Fee

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

PLANNING		Charges 22/23			Proposed charges 23/24				
	UNIT	Basic (£)	VAT (£)	Total (£)	Basic (£)	VAT (£)	Total (£)	% Change	Basis for charging
Residential Institutions (Use Class C2A) to a State Funded School									
7.7 Change of Use of a building and any land within its curtilage from an Agricultural Building to a State-Funded School		£96.00	0.00	£96.00	£96.00	0.00	£96.00	0.0	Statutory Fee
7.8 Change of Use of a building and any land within its curtilage from an Agricultural Building to a flexible use within Commercial/Business/Service (Use Class E), Storage or Distribution (Use Class B8), Hotels (Use Class C1)		£96.00	0.00	£96.00	£96.00	0.00	£96.00	0.0	Statutory Fee
7.9 Change of Use of a building and any land within its curtilage from Commercial/Business/Service (Use Class E) to Dwellinghouses (Use Class C3) (From 30 July 2021)		£96.00	0.00	£96.00	£96.00	0.00	£96.00	0.0	Statutory Fee
7.10 Change of Use of a building and any land within its curtilage from an Agricultural Building		£96.00	0.00	£96.00	£96.00	0.00	£96.00	0.0	Statutory Fee

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

PLANNING		Charges 22/23			Proposed charges 23/24				
	UNIT	Basic (£)	VAT (£)	Total (£)	Basic (£)	VAT (£)	Total (£)	% Change	Basis for charging
to Dwellinghouses (Use Class C3)									
7.11 Change of Use of a building and any land within its curtilage from an Agricultural Building to Dwellinghouses (Use Class C3); where it includes building operations in connection with the change of use		£206.00	0.00	£206.00	£206.00	0.00	£206.00	0.0	Statutory Fee
7.12 Change of Use of a building from Betting Office, Pay Day Loan Shop, Launderette; a mixed use combining one of these uses and use as dwellinghouse(s) or Hot Food Takeaway to Dwellinghouses (Use Class C3)		£96.00	0.00	£96.00	£96.00	0.00	£96.00	0.0	Statutory Fee
7.13 Change of Use of a building from Betting Office, Pay Day Loan Shop, Launderette; a mixed use combining one of these uses and use as dwellinghouse(s) or Hot Food Takeaway to Dwellinghouses (Use Class C3); where it includes building		£206.00	0.00	£206.00	£206.00	0.00	£206.00	0.0	Statutory Fee

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

PLANNING		Charges 22/23			Proposed charges 23/24				
	UNIT	Basic (£)	VAT (£)	Total (£)	Basic (£)	VAT (£)	Total (£)	% Change	Basis for charging
operations in connection with the change of use									
7.14 Change of Use of a building and any land within its curtilage from Amusement Arcades / Centres and Casinos to Dwellinghouses (Use Class C3)		0.0	£96.00	0.00	£96.00	0.00	£96.00	0.0	Statutory Fee
7.15 Change of Use of a building and any land within its curtilage from Amusement Arcades / Centres and Casinos to Dwellinghouses (Use Class C3); where it includes building operations in connection with the change of use		0.0	£206.00	0.00	£206.00	0.00	£206.00	0.0	Statutory Fee
7.16 Development consisting of the Erection or Construction of a Collection Facility within the curtilage of a Shop		0.0	£96.00	0.00	£96.00	0.00	£96.00	0.0	Statutory Fee
7.17 Temporary Use of Buildings or Land for the Purpose of Commercial Film-Making and the Associated Temporary		0.0	£96.00	0.00	£96.00	0.00	£96.00	0.0	Statutory Fee

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

PLANNING	UNIT	Charges 22/23			Proposed charges 23/24			% Change	Basis for charging
		Basic (£)	VAT (£)	Total (£)	Basic (£)	VAT (£)	Total (£)		
Structures, Works, Plant or Machinery required in Connection with that Use									
7.18 Installation, Alteration or Replacement of other Solar Photovoltaics (PV) equipment on the Roofs of Non-domestic Buildings, up to a Capacity of 1 Megawatt		0.0	£96.00	0.00	£96.00	0.00	£96.00	0.0	Statutory Fee
7.19 Prior approval application where a planning application for the same site is submitted at the same time by or on behalf of the same person		0.0	£0.00	0.00	£0.00	0.00	£0.00	0.0	Statutory Fee
7.20 Additional storeys on a home (From 30 July 2021)	per dwelling house	£96.00	0.00	£96.00	£96.00	0.00	£96.00	0.0	Statutory Fee
7.21 Construction of new dwelling houses - not more than 50 dwellings (from 2 Sept 20)		£334.00	0.00	£334.00	£334.00	0.00	£334.00	0.0	Statutory Fee

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

PLANNING		Charges 22/23			Proposed charges 23/24				
	UNIT	Basic (£)	VAT (£)	Total (£)	Basic (£)	VAT (£)	Total (£)	% Change	Basis for charging
7.22 Construction of new dwelling houses - more than 50 dwelling hours (from 2 Sept 20)		£16,525 plus £100 for each dwelling house in excess of 50. Max. fee of £300,000	0.00	£16,525 plus £100 for each dwelling house in excess of 50. Max. fee of £300,000	£16,525 plus £100 for each dwelling house in excess of 50. Max. fee of £300,000	0.00	£16,525 plus £100 for each dwelling house in excess of 50. Max. fee of £300,000	0.0	Statutory Fee
7.23 Movable structure within the curtilage of a historic visitor attraction, or listed pub/restaurant/etc (From 2 January 2022)		96.00	0.00	96.00	96.00	0.00	96.00	0.0	Statutory Fee
7.24 Provision of Temporary School Buildings on vacant commercial land and the use of that land as a state-funded school for up to 3 Academic Years		96.00	0.00	96.00	96.00	0.00	96.00	0.0	Statutory Fee
7.25 Erection, extension or alteration of a University Building (From 21 April 2021)		96.00	0.00	96.00	96.00	0.00	96.00	0.0	Statutory Fee
8. Approval / variation / discharge of condition									
8.1 Application for removal or variation of condition following grant of planning permission	Per Request	£234.00	£0.00	£234.00	£234.00	0.00	£234.00	£0.00	Statutory Fee

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

PLANNING		Charges 22/23			Proposed charges 23/24				
	UNIT	Basic (£)	VAT (£)	Total (£)	Basic (£)	VAT (£)	Total (£)	% Change	Basis for charging
8.2 Request to discharge one or more householder planning conditions	Per Request	£34.00	£0.00	£34.00	£34.00	0.00	£34.00	£0.00	Statutory Fee
8.3 Request to discharge one or more non-householder planning conditions	Per Request	£116.00	£0.00	£116.00	£116.00	0.00	£116.00	£0.00	Statutory Fee
8.4 Request to discharge planning conditions on new build developments		£116.00	£0.00	£116.00	£116.00	0.00	£116.00	£0.00	Statutory Fee
8.5 Request to discharge planning conditions related to listed building consent		£0.00	£0.00	£0.00	£0.00	0.00	£0.00	£0.00	Statutory Fee
8.6 Request to discharge planning conditions attached to applications resulting from a condition removing "permitted development rights"		£0.00	£0.00	£0.00	£0.00	0.00	£0.00	£0.00	Statutory Fee
9. Change of Use	Per dwellinghouse								
9.1 Change of use of a building to use as between 1 and 50 separate dwellinghouses		£462.00	0.00	£462.00	£462.00	0.00	£462.00	0.00	Statutory Fee

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

PLANNING		Charges 22/23			Proposed charges 23/24				
	UNIT	Basic (£)	VAT (£)	Total (£)	Basic (£)	VAT (£)	Total (£)	% Change	Basis for charging
9.2 Change of use of a building to use as more than 50 separate dwellinghouses		£22,859 plus £138 per additional dwellinghouse in excess of 50 up to a maximum of £300,000	0.00	£22,859 plus £138 per additional dwellinghouse in excess of 50 up to a maximum of £300,000	£22,859 plus £138 per additional dwellinghouse in excess of 50 up to a maximum of £300,000	0.00	£22,859 + £138 per additional dwellinghouse in excess of 50 up to a maximum of £300,000	0.00	Statutory Fee
9.3 Other change of use of a building or land		£462.00	0.00	£462.00	£462.00	0.00	£462.00	0.00	Statutory Fee
10. Consent to Display Advertisements									
10.1 Advertising displayed externally on business premises, the forecourt of business premises or other land within the curtilage of business premises relating to the business on the premises		£132.00	0.00	£132.00	£132.00	0.00	£132.00	0.00	Statutory Fee
10.2 Advertisements for the purpose of directing members of the public to, or otherwise drawing attention to the existence of, business premises which are in the same locality as the site on which the advertisement		£132.00	0.00	£132.00	£132.00	0.00	£132.00	0.00	Statutory Fee

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

PLANNING	UNIT	Charges 22/23			Proposed charges 23/24			% Change	Basis for charging
		Basic (£)	VAT (£)	Total (£)	Basic (£)	VAT (£)	Total (£)		
is to be displayed but which are not visible from that site									
10.3 All other advertisements		£462.00	0.00	£462.00	£462.00	0.00	£462.00	0.00	Statutory Fee
10.4 Application for consent to display an advertisement following a withdrawal of an earlier application (before notice of decision was issued) and where the application is made by or on behalf of the same person		£0.00	0.00	£0.00	£0.00	0.00	£0.00	0.00	Statutory Fee
10.5 Application for consent to display an advertisement following refusal of consent for display of an advertisement and where the application is made by or on behalf of the same person		£0.00	0.00	£0.00	£0.00	0.00	£0.00	0.00	Statutory Fee
10.6 Application for consent to display an advertisement which results from a direction under Regulation 7 of the Control of		£0.00	0.00	£0.00	£0.00	0.00	£0.00	0.00	Statutory Fee

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

PLANNING	UNIT	Charges 22/23			Proposed charges 23/24			% Change	Basis for charging
		Basic (£)	VAT (£)	Total (£)	Basic (£)	VAT (£)	Total (£)		
Advertisements Regulations 1992, dis-applying deemed consent under Regulation 6 to the proposed advertisement									
11. Application for a Non-material Amendment following a grant of planning permission									
11.1 Applications in respect of householder developments		£34.00	0.00	£34.00	£34.00	0.00	£34.00	0.00	Statutory Fee
11.2 Applications in respect of other developments	per 0.1 hectare (or part thereof)	£234.00	0.00	£234.00	£234.00	0.00	£234.00	0.00	Statutory Fee
12. Permissions in Principle									
12.1 Application for Permission in Principle		£402 per 0.1 hectare (or part thereof)	0.00	£402 per 0.1 hectare (or part thereof)	£402 per 0.1 hectare (or part thereof)	0.00	£402 per 0.1 hectare (or part thereof)	0.00	Statutory Fee
13. Listed Buildings									
13.1 Listed Building Consent		0.0	0.00	0.00	0.0	0.00	0.00	0.00	Statutory Fee

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PLANNING		Charges 22/23			Proposed charges 23/24				
	UNIT	Basic (£)	VAT (£)	Total (£)	Basic (£)	VAT (£)	Total (£)	% Change	Basis for charging
13.2 Certificate of Lawfulness of Proposed Works to a listed building		0.0	0.00	0.00	0.0	0.00	0.00	0.00	Statutory Fee
13.3 Application relates to condition(s) on an application for Listed Building Consent		0.0	0.00	0.00	0.0	0.00	0.00	0.00	Statutory Fee
13.4 Demolition of a Listed Building		0.0	0.00	0.00	0.0	0.00	0.00	0.00	Statutory Fee
14. Demolition									
14.1 Demolition of unlisted buildings within conservation areas		0.0	0.00	0.00	0.0	0.00	0.00	0.00	Statutory Fee
14.2 Demolition of a Listed Building		0.0	0.00	0.00	0.0	0.00	0.00	0.00	Statutory Fee
15. Trees									
15.1 Works to Trees in Conservation Areas		0.0	0.00	0.00	0.0	0.00	0.00	0.00	Statutory Fee
15.2 Works to Trees covered by Tree Preservation Orders		0.0	0.00	0.00	0.0	0.00	0.00	0.00	Statutory Fee
15.3 Hazardous Trees - 5-day notice		0.0	0.00	0.00	0.0	0.00	0.00	0.00	Statutory Fee
15.4 Tree Preservation Orders		0.0	0.00	0.00	0.0	0.00	0.00	0.00	Statutory Fee

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PLANNING		Charges 22/23			Proposed charges 23/24				
	UNIT	Basic (£)	VAT (£)	Total (£)	Basic (£)	VAT (£)	Total (£)	% Change	Basis for charging
16. Design Review Panel									
16.1 Standard Review (up to and including 50 units) - First Review Meeting		2600.00	0.20	3120.00	2730.00	0.20	3276.00	5.0	Legislation provides for discretionary charging
16.2 Standard Review (up to and including 50 units) - Subsequent Review Meetings		2090.00	0.20	2508.00	2194.50	0.20	2633.40	5.0	Legislation provides for discretionary charging
16.3 Standard Review (more than 50 units) - First Review Meeting		4180.00	0.20	5016.00	4389.00	0.20	5266.80	5.0	Legislation provides for discretionary charging
16.4 Standard Review (more than 50 units) - Subsequent Review Meetings		3660.00	0.20	4392.00	3843.00	0.20	4611.60	5.0	Legislation provides for discretionary charging
16.5 Premium Review (2.5-hour review) - First Review Meeting		7300.00	0.20	8760.00	7665.00	0.20	9198.00	5.0	Legislation provides for discretionary charging
16.6 Premium Review (2.5-hour review) - Subsequent Review Meetings		6260.00	0.20	7512.00	6573.00	0.20	7887.60	5.0	Legislation provides for discretionary charging
16.7 Cancellation of meeting within 28 working days of meeting		520.00	0.20	624.00	546.00	20.00	655.20	5.0	Legislation provides for discretionary charging

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

PLANNING		Charges 22/23			Proposed charges 23/24				
	UNIT	Basic (£)	VAT (£)	Total (£)	Basic (£)	VAT (£)	Total (£)	% Change	Basis for charging
16.8 Cancellation of meeting within 10 working days of meeting		1045.00	0.20	1254.00	1097.25	20.00	1316.70	5.0	Legislation provides for discretionary charging
16.9 Reorganisation of meeting date once meeting has been arranged (per reorganisation at customer request)		200.00	0.20	240.00	210.00	20.00	252.00	5.0	Legislation provides for discretionary charging
17. Planning Advice Services									
17.1 Planning Information (Informal written feedback on simple planning queries)									
17.1.1 Submitting complete planning applications, including which forms to use and if you have filled them in correctly		52.50	0.20	63.00	52.50	10.5	63.00	0.00	Legislation provides for discretionary charging
17.1.2 Whether or not you need planning permission to build or use a building differently		52.50	0.20	63.00	52.50	10.5	63.00	0.00	Legislation provides for discretionary charging
17.1.3 Whether proposed alterations require listed building consent	per obligation	52.50	0.20	63.00	52.50	10.5	63.00	0.00	Legislation provides for discretionary charging
17.1.4 Explanation of planning policy, including the evidence needed and	per condition	52.50	0.20	63.00	52.50	10.5	63.00	0.00	Legislation provides for

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

PLANNING		Charges 22/23			Proposed charges 23/24				
	UNIT	Basic (£)	VAT (£)	Total (£)	Basic (£)	VAT (£)	Total (£)	% Change	Basis for charging
how to apply planning policies in general									discretionary charging
17.1.5 Confirmation that a specific planning obligation has been discharged		52.50	0.20	63.00	52.50	10.5	63.00	0.00	Legislation provides for discretionary charging
17.1.6 Confirmation that an identified planning condition has been met		52.50	0.20	63.00	52.50	10.5	63.00	0.00	Legislation provides for discretionary charging
17.1.7 Confirmation that an identified planning enforcement notice has been met		52.50	0.20	63.00	125.00	25	150.00	138.00	Legislation provides for discretionary charging
17.1.8 Removal / Cancellation of planning enforcement notice.					125.00	25	150.00		Legislation provides for discretionary charging
17.1.19 Formal confirmation that an Enforcement case has been closed.					41.67	8.33	50.00		Legislation provides for discretionary charging
17.2 Duty Planner Standard (20-minute meeting with Planning Officer)	per site	108.33	0.20	130.00	110.50	22.1	132.60	2.00	Legislation provides for discretionary charging
17.3 Duty Planner Complex (20-minute meeting with Planning Officer)	per site	188.33	0.20	220.00	195.83	39.17	235.00	4.00	Legislation provides for discretionary charging

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

PLANNING	UNIT	Charges 22/23			Proposed charges 23/24				
		Basic (£)	VAT (£)	Total (£)	Basic (£)	VAT (£)	Total (£)	% Change	Basis for charging
17.4 Written confirmation if property is in a conservation area		20.00	0.20	24.00	20.00	4	24.00	0.00	Legislation provides for discretionary charging
17.5 Written confirmation of tree preservation order		20.00	0.20	24.00	20.00	4	24.00	0.00	Legislation provides for discretionary charging
18. Listed Building Advice (Assessment of physical works to listed buildings). Fees are chargeable alongside fees required for general planning advice, including duty planner or pre-application advice.									
18.1 Householder Written Advice		390.00	0.20	468.00	390.00	78	468.00	0.00	Legislation provides for discretionary charging
18.2 Householder Written Advice with one-hour meeting on site with conservation officer		560.00	0.20	672.00	560.00	112	672.00	0.00	Legislation provides for discretionary charging
18.3 Householder follow-up advice		170.00	0.20	204.00	170.00	34	204.00	0.00	Legislation provides for discretionary charging

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

PLANNING		Charges 22/23			Proposed charges 23/24				
	UNIT	Basic (£)	VAT (£)	Total (£)	Basic (£)	VAT (£)	Total (£)	% Change	Basis for charging
18.4 Non-householder Written Advice		710.00	0.20	852.00	710.00	142	852.00	0.00	Legislation provides for discretionary charging
18.5 Non-householder Written Advice with one-hour meeting on site with conservation officer and a planning officer		1035.00	0.20	1242.00	1035.00	207	1242.00		Legislation provides for discretionary charging
18.6 non-householder follow-up advice		510.00	0.20	612.00	510.00	102	612.00	0.00	Legislation provides for discretionary charging
19. Pre-application Advice Services									
19.1 Concept Meeting (30-minute meeting to discuss principle of development and brief written response) - Single-plot subdivision (conversion of one house into two flats or one plot into two plots or addition of residential annexe)		308.33	0.20	370.00	323.75	64.75	388.50	5.00	Legislation provides for discretionary charging
19.2 Concept Meeting (30-minute meeting to discuss principle of development and brief written response) - All development except single-plot subdivision		516.67	0.20	600.00	542.50	108.5	651.00	5.00	Legislation provides for discretionary charging

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

PLANNING		Charges 22/23			Proposed charges 23/24				
	UNIT	Basic (£)	VAT (£)	Total (£)	Basic (£)	VAT (£)	Total (£)	% Change	Basis for charging
19.3 Concept Meeting - Major Developments (part of PPA Service)		1045.00	0.20	1254.00	1097.25	219.45	1316.70	5.00	Legislation provides for discretionary charging
19.4 Pre-application Meeting									
19.4.1 Small minor development (One additional property (including conversion and annexe)) - First Meeting		780.00	0.20	936.00	819.00	163.8	982.80	5.00	Legislation provides for discretionary charging
19.4.2 Small minor development (One additional property (including conversion and annexe)) - Follow-up Meeting (Single Issue)		416.67	0.20	500.00	437.50	87.5	525.00	5.00	Legislation provides for discretionary charging
19.4.3 Small minor development (2-4 new residential dwellings (including conversion and annexe)) - First Meeting		1250.00	0.20	1440.00	1312.50	262.5	1575.00	5.00	Legislation provides for discretionary charging
19.4.4 Small minor development (2-4 new residential dwellings (including conversion and annexe)) - Follow-up Meeting (Single Issue)		625.00	0.20	750.00	656.25	131.25	787.50	5.00	Legislation provides for discretionary charging
19.4.5 Small minor development (Change of		1250.00	0.20	1500.00	1312.50	262.5	1575.00	5.00	Legislation provides for

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

PLANNING		Charges 22/23			Proposed charges 23/24				
	UNIT	Basic (£)	VAT (£)	Total (£)	Basic (£)	VAT (£)	Total (£)	% Change	Basis for charging
use from 150 sqm to 500 sqm) - First Meeting									discretionary charging
19.4.6 Small minor development (Change of use from 150 sqm to 500 sqm) - Follow-up Meeting (Single Issue)		625.00	0.20	750.00	656.25	131.25	787.50	5.00	Legislation provides for discretionary charging
19.4.7 Larger minor development (5-9 new residential dwellings (including conversion)) - First Meeting	Per meeting	1570.00	0.20	1884.00	1648.50	329.7	1978.20	5.00	Legislation provides for discretionary charging
19.4.8 Larger minor development (5-9 new residential dwellings (including conversion)) - Follow-up Meeting		735.00	0.20	882.00	771.75	154.35	926.10	5.00	Legislation provides for discretionary charging
19.4.9 Larger minor development (Change of use from 500 sqm to 999 sqm non-residential floor space) - First Meeting	Per meeting	1570.00	0.20	1884.00	1648.50	329.70	1978.20	5.00	Legislation provides for discretionary charging
19.4.10 Larger minor development (Change of use from 500 sqm to 999 sqm non-residential floor space) - Follow-up Meeting (Single Issue)	Per meeting	735.00	0.20	882.00	771.75	154.35	926.10	5.00	Legislation provides for discretionary charging
19.4.11 Small major development (10-30 new residential dwellings (including conversion)) - First Three Meetings	Per meeting	2500.00	0.20	3000.00	2625.00	525.00	3150.00	5.00	Legislation provides for discretionary charging

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

PLANNING		Charges 22/23			Proposed charges 23/24				
	UNIT	Basic (£)	VAT (£)	Total (£)	Basic (£)	VAT (£)	Total (£)	% Change	Basis for charging
19.4.12 Small major development (10-30 new residential dwellings (including conversion)) - Meeting four onwards	Per meeting	1150.00	0.20	1380.00	1207.50	241.50	1449.00	5.00	Legislation provides for discretionary charging
19.4.13 Small major development (1,000 - 1,999 sqm non-residential floor space) - First Three Meetings	Per meeting	2500.00	0.20	3000.00	2625.00	525.00	3150.00	5.00	Legislation provides for discretionary charging
19.4.14 Small major development (1,000 - 1,999 sqm non-residential floor space) - Meeting four onwards	Per meeting	1150.00	0.20	1380.00	1207.50	241.50	1449.00	5.00	Legislation provides for discretionary charging
19.4.15 Medium major development (31-99 new residential dwellings (including conversion)) - First Three Meetings	Per meeting	3135.00	0.20	3762.00	3291.75	658.35	3950.10	5.00	Legislation provides for discretionary charging
19.4.16 Medium major development (31-99 new residential dwellings (including conversion)) - Meeting four onwards	Per meeting	1460.00	0.20	1752.00	1533.00	306.6	1839.60	5.00	Legislation provides for discretionary charging
19.4.17 Medium major development (2,000 - 2,999 sqm non-residential floor space) - First Three Meetings	Per meeting	3135.00	0.20	3762.00	3291.75	658.35	3950.10	5.00	Legislation provides for discretionary charging
19.4.18 Medium major development (2,000 - 2,999 sqm non-	Per meeting	1460.00	0.20	1752.00	1533.00	306.60	1839.60	5.00	Legislation provides for

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

PLANNING		Charges 22/23			Proposed charges 23/24				
	UNIT	Basic (£)	VAT (£)	Total (£)	Basic (£)	VAT (£)	Total (£)	% Change	Basis for charging
residential floor space) - Meeting four onwards									discretionary charging
19.19 Large major development (100-149 new residential dwellings (including conversion)) - First Three Meetings	Per meeting	4180.00	0.20	5016.00	4389.00	877.80	5266.80	5.00	Legislation provides for discretionary charging
19.20 Large major development (100-149 new residential dwellings (including conversion)) - Meeting four onwards	Per meeting	1880.00	0.20	2256.00	1974.00	394.80	2368.80	5.00	Legislation provides for discretionary charging
19.21 Large major development (3,000 plus sqm non-residential floor space) - First Three Meetings	Per meeting	4180.00	0.20	5016.00	4389.00	877.80	5266.80	5.00	Legislation provides for discretionary charging
19.22 Large major development (3,000 plus sqm non-residential floor space) - Meeting four onwards	Per meeting	1880.00	0.20	2256.00	1974.00	394.80	2368.80	5.00	Legislation provides for discretionary charging
19.23 Very large major development (150 and over new residential dwellings (including conversion)) - First Three Meetings	Per meeting	5225.00	0.20	6270.00	5486.25	1097.25	6583.50	5.00	Legislation provides for discretionary charging
19.24 Very large major development (150 and over new residential dwellings (including	Per meeting	2090.00	0.20	2508.00	2194.50	438.90	2633.40	5.00	Legislation provides for discretionary charging

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

PLANNING		Charges 22/23			Proposed charges 23/24				
	UNIT	Basic (£)	VAT (£)	Total (£)	Basic (£)	VAT (£)	Total (£)	% Change	Basis for charging
conversion)) - Meeting four onwards									
19.25 Very large major development (EIA Development) - First Three Meetings	Per hour	5225.00	0.20	6270.00	5486.25	1097.25	6583.50	5.00	Legislation provides for discretionary charging
19.30 Very large major development (EIA Development) - Meeting four onwards	Per hour	2090.00	0.20	2508.00	2194.50	438.90	2633.40	5.00	Legislation provides for discretionary charging
19.31 Environmental Health specialist resource		105.00	0.20	126.00	115.50	23.10	138.60	10.00	Legislation provides for discretionary charging
19.32 Highways specialist resource		105.00	0.20	126.00	115.50	23.10	138.60	10.00	Legislation provides for discretionary charging
20. Planning Performance Agreements (PPA)	Based on required staff time / expertise								
Arrangement Fee	per hour	2083.33	0.20	2500.00	2187.50	437.50	2625.00	5.00	Legislation provides for discretionary charging
PPA Fee is based upon staff time (daily rates) across the project duration. Fee will be agreed as part of PPA negotiation process.	per hour		Subject to agreement during PPA	0.20		Subject to agreement during PPA	0.20	Subject to agreement during PPA negotiation	Legislation provides for discretionary charging

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

PLANNING		Charges 22/23			Proposed charges 23/24				
	UNIT	Basic (£)	VAT (£)	Total (£)	Basic (£)	VAT (£)	Total (£)	% Change	Basis for charging
			negotiation			negotiation			
Environmental Health specialist resource		105.00	0.20	126.00	115.50	23.10	138.60	10.00	Legislation provides for discretionary charging
Highways specialist resource		105.00	0.20	126.00	115.50	23.10	138.60	10.00	Legislation provides for discretionary charging
21. Local Land Charges Service									
21.1 Local Land Charges Register only for residential property	Per question	44.00	0.00	44.00	44.00	0.00	44.00	0.00	Legislation provides for discretionary charging
21.2 Local Land Charges Register only for commercial property					88.00	0.00	88.00		Legislation provides for discretionary charging
21.3 Optional Questions Only		10.45	0.20	12.54	12.50	2.50	15.00	19.60	Legislation provides for discretionary charging
21.4 CON 29 for residential property	Per question	94.00	20.00	112.80	150.00	30.00	180.00	59.57	Legislation provides for discretionary charging
21.5 CON 29 for commercial property	per parcel				188.00	37.60	225.60		Legislation provides for

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

PLANNING		Charges 22/23			Proposed charges 23/24				
	UNIT	Basic (£)	VAT (£)	Total (£)	Basic (£)	VAT (£)	Total (£)	% Change	Basis for charging
									discretionary charging
21.6 Additional Questions on Con29	In addition to normal full search fee.	26.00	0.00	26.00	26.00	0.00	26.00	0.00	Legislation provides for discretionary charging
21.7 Additional parcels	In addition to normal full search fee.	26.00	0.00	26.00	26.00	0.00	26.00	0.00	Legislation provides for discretionary charging
21.8 Full Local Authority expedited search fee (next working day)	In addition to normal full search fee.				41.67	8.33	50.00		Legislation provides for discretionary charging
21.9 Register Search (LLC1) expedited search fee (next working day)					12.50	2.50	15.00		Legislation provides for discretionary charging
21.10 Enhanced Register search fee service that includes copies of documents on register					64.17	12.83	77.00		Legislation provides for discretionary charging
21.11 Search cancellation fee within 24 hours of search being prepared					Full search fee is payable		Full search fee is payable		Legislation provides for discretionary charging
21.12 Amended Register search:									
21.12.1 Register only					5.00	0.00	5.00		Legislation provides for discretionary charging

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

PLANNING	UNIT	Charges 22/23			Proposed charges 23/24			% Change	Basis for charging
		Basic (£)	VAT (£)	Total (£)	Basic (£)	VAT (£)	Total (£)		
21.12.2 CON29 only									

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

SERVICE: HIGHWAYS

HIGHWAYS	UNIT	Charges 22/23			Proposed charges 23/24			% Change	Basis for charging
		Basic (£)	VAT (£)	Total (£)	Basic (£)	VAT (£)	Total (£)		
Domestic Crossover Application	Each	116.00	0.00	116.00	127.00	0.00	£127.00	9.5	Discretionary
Domestic Crossover Installation	Each	1060.00	0.00	1060.00	2230.00	0.00	£2,230.00	110.4	Discretionary
Domestic Crossover Extension	Each	318.00	0.00	318.00	900.00	0.00	£900.00	183.0	Discretionary
CPZ T.O. amendments due to crossovers	Each	265.00	0.00	265.00	291.24	0.00	£291.00	9.8	Discretionary
Access Bars (road markings)	Each	106.00	0.00	106.00	116.49	0.00	£118.00	11.3	Discretionary
Inspection of rechargeable works and other fees	Hr	80.00	0.00	80.00	87.92	0.00	£88.00	10.0	Discretionary
Skip Licence	Per Month	69.00	0.00	69.00	75.83	0.00	£76.00	10.1	Discretionary
Container Licence	Per Month	116.00	0.00	116.00	127.48	0.00	£127.00	9.5	Discretionary
Scaffold Licence	3 months	300.00	0.00	300.00	329.70	0.00	£330.00	10.0	Discretionary
Scaffold Licence renewal	3 months	63.00	0.00	63.00	69.24	0.00	£69.00	9.5	Discretionary
Hoarding Licence	3 months	208.00	0.00	208.00	228.59	0.00	£229.00	10.1	Discretionary

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

HIGHWAYS		Charges 22/23			Proposed charges 23/24				
	UNIT	Basic (£)	VAT (£)	Total (£)	Basic (£)	VAT (£)	Total (£)	% Change	Basis for charging
Hoarding Licence renewal	3 months	64.00	0.00	64.00	70.34	0.00	£70.00	9.4	Discretionary
Materials licence	1 month	69.00	0.00	69.00	75.83	0.00	£76.00	10.1	Discretionary
Emergency Temporary Traffic Order	Each	425.00	0.00	425.00	467.08	0.00	£467.00	9.9	Discretionary
Temporary Traffic Order	Each	2120.00	0.00	2120.00	2329.88	0.00	£2,330.00	9.9	Discretionary
Highway Searches	Each	80.00	0.00	80.00	87.92	0.00	£88.00	10.0	Discretionary
Crane Licence and over sail	3 months	430.00	0.00	430.00	472.57	0.00	£473.00	10.0	Discretionary
Crane Licence and over sail extension	1 month	117.00	0.00	117.00	128.58	0.00	£129.00	10.3	Discretionary
Section 50 Licence new apparatus	Each	470.00	0.00	470.00	516.53	0.00	£517.00	10.0	Discretionary
Section 50 Licence existing apparatus	Each	285.00	0.00	285.00	313.22	0.00	£313.00	9.8	Discretionary
Traffic order for permanent restrictions or changes	Each	5300.00	0.00	5300.00	5824.70	0.00	£5,825.00	9.9	Discretionary
Car club bay individual order	Each	3785.00	0.00	3785.00	4159.72	0.00	£4,160.00	9.9	Discretionary
Notices for road humps and controlled crossings	Each	3710.00	0.00	3710.00	4077.29	0.00	£4,077.00	9.9	Discretionary
Stopping up and diversion orders of the highway (T&C Planning Act section 247 & 253)	Each	5200.00	0.00	5200.00	5714.80	0.00	£5,715.00	9.9	Discretionary

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

HIGHWAYS		Charges 22/23			Proposed charges 23/24				
	UNIT	Basic (£)	VAT (£)	Total (£)	Basic (£)	VAT (£)	Total (£)	% Change	Basis for charging
Section 38 Road Adoption Agreement	% of estimated construction costs			0.08	0.00	0.00	8%	0	Discretionary
Section 278 Works on highway by outside body	% of estimated construction costs			0.08	0.00	0.00	8%	0	Discretionary
Application fee for S38/S278 Agreements where over £100k of works	Each	5304.00	0.00	5304.00	5829.10	0.00	£5,829.00	9.9	Discretionary
Application fee for highway agreements including S8s	Each	1560.00	0.00	1560.00	1714.44	0.00	£1,714.00	9.9	Discretionary

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

SERVICE: STREET NAME AND NUMBERING

STREET NAME AND NUMBERING	UNIT	Charges 22/23			Proposed charges 23/24			% Change	Basis for charging
		Basic (£)	VAT (£)	Total (£)	Basic (£)	VAT (£)	Total (£)		
Written confirmation of address.		37.00	0.00	37.00	40.00	0.00	40.00	8.1	Discretionary
New street name		420.00	0.00	420.00	462.00	0.00	462.00	10.0	Discretionary
New multiple property numbering (e.g., block of flats)		58.00	0.00	58.00	63.00	0.00	63.00	8.6	Discretionary
New individual property number		58.00	0.00	58.00	63.00	0.00	63.00	8.6	Discretionary
New building name		420.00	0.00	420.00	462.00	0.00	462.00	10.0	Discretionary
Change of name or number for a single property		58.00	0.00	58.00	63.00	0.00	63.00	8.6	Discretionary
Change of name and number for multiple properties (e.g. block of flats)		13.00	0.00	13.00	14.00	0.00	14.00	7.7	Discretionary
Add a name to a numbered property		58.00	0.00	58.00	63.00	0.00	63.00	8.6	Discretionary

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

SERVICE: PRIVATE SECTOR HOUSING AGENCY

PRIVATE SECTOR HOUSING AGENCY	UNIT	Charges 22/23			Proposed charges 23/24			% Change	Basis for charging
		Basic (£)	VAT (£)	Total (£)	Basic (£)	VAT (£)	Total (£)		
Service first Improvement Notice/Suspended Improvement Notice	per notice	433	86.53	519.17	475.00	95.00	570.00	9.8	Discretionary
Service first Prohibition Order/Suspended prohibition Order	per notice	433	86.53	519.17	475.00	95.00	570.00	9.8	Discretionary
Service First Hazard Awareness Notice	per notice	433	86.53	519.17	475.00	95.00	570.00	9.8	Discretionary
First Emergency Remedial Action	per notice	433	86.53	519.17	475.00	95.00	570.00	9.8	Discretionary
Service Emergency Prohibition Order	per notice	433	86.53	519.17	475.00	95.00	570.00	9.8	Discretionary
Service second and subsequent Improvement/Suspended Improvement Notice	per notice	92	18.39	110.32	100.00	20.00	120.00	8.8	Discretionary
Service second and subsequent Prohibition Order/Suspended Prohibition Order	per notice	92	18.39	110.32	100.00	20.00	120.00	8.8	Discretionary
Service second or subsequent Hazard Awareness Notice	per notice	92	18.39	110.32	100.00	20.00	120.00	8.8	Discretionary
Second or subsequent Emergency Remedial Action	per notice	92	18.39	110.32	100.00	20.00	120.00	8.8	Discretionary
Service second or subsequent Overcrowding Notice	per notice	92	18.39	110.32	100.00	20.00	120.00	8.8	Discretionary
Service second or subsequent Emergency Prohibition Order	per notice	92	18.39	110.32	100.00	20.00	120.00	8.8	Discretionary
Adequate Accommodation Assessment (Immigration Rules 2016)	per inspection	206	41.10	246.60	225.00	45.00	270.00	9.5	Discretionary
Assistance in completing HMO application form	per application	54	10.82	64.90	175.00	35.00	210.00	223.6	Discretionary

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

PRIVATE SECTOR HOUSING AGENCY	UNIT	Charges 22/23			Proposed charges 23/24			% Change	Basis for charging
		Basic (£)	VAT (£)	Total (£)	Basic (£)	VAT (£)	Total (£)		
Completion of floor plans for HMO licence application	per application	162	32.33	194.00	175.00	35.00	210.00	8.2	Discretionary
Civil Penalty Notice First Breach (payment received in 14 days)	per notice	1250	250	1500	1250	250	1500	0.0	Statutory
Civil Penalty Notice first breach (payment received after 14 days)	per notice	2500	500	3000	2500	500	3000	0.0	Statutory
Civil Penalty Notice second breach (payment received in 14 days)	per notice	2500	500	3000	2500	500	3000	0.0	Statutory
Civil Penalty Notice second breach (payment received after 14 days)	per notice	5000	1000	6000	5000	1000	6000	0.0	Statutory
Civil Penalty Notice third and any subsequent breach	per notice	5000	1000	6000	5000	1000	6000	0.0	Statutory
Additional HMO license fee	per lettable unit	500	0	500	500	0	500	0.0	Discretionary
Mandatory HMO license fee	per lettable unit	500	0	500	500	0	500	0.0	Discretionary
Agency Fee (Disabled Facilities Grant)	by reference to cost of work on property	17.5% approved cost of works			17.5% approved cost of works				Discretionary
Adaption Fee (Disabled Facilities Grant)	by reference to cost of work on property	15% approved cost of works			15% approved cost of works				Discretionary
Agency Fee (Housing Regeneration Grant)	by reference to cost of	15% approved cost of works			15% approved cost of works				Discretionary

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

PRIVATE SECTOR HOUSING AGENCY	UNIT	Charges 22/23			Proposed charges 23/24			% Change	Basis for charging
		Basic (£)	VAT (£)	Total (£)	Basic (£)	VAT (£)	Total (£)		
	work on property								
Empty Homes VAT exemption certificate.	Per certificate	156.00	31.20	187.20	170.98	34.20	205.17	9.6	Discretionary

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

SERVICE: ENVIRONMENTAL HEALTH

ENVIRONMENTAL HEALTH	UNIT	Charges 22/23			Proposed charges 23/24			% Change	Basis for charging
		Basic (£)	VAT (£)	Total (£)	Basic (£)	VAT (£)	Total (£)		
1. Massage and Special Treatment Licence - new applications									Discretionary
FULL LICENCE - CLASSES 1, 2 AND 3		350.00		350.00	385.00	0.00	385.00	10.0	Discretionary
CLASS 1 ONLY		270.00		270.00	297.00		297.00	10.0	Discretionary
CLASS 2 ONLY		210.00		210.00	231.00		231.00	10.0	Discretionary
CLASS 3 ONLY		180.00		180.00	198.00		198.00	10.0	Discretionary
CLASSES 1 & 2 OR 1 & 3		280.00		280.00	308.00		308.00	10.0	Discretionary
CLASSES 2 & 3		230.00		230.00	253.00		253.00	10.0	Discretionary
BODY PIERCING		190.00		190.00	209.00		209.00	10.0	Discretionary
TATTOOING		190.00		190.00	209.00		209.00	10.0	Discretionary
IPL		480.00		480.00	528.00		528.00	10.0	Discretionary
RENEWAL=100% of application fee									Discretionary
TRANSFER AND/OR VARIATION=25% of application fee									Discretionary
2. Zoo Licensing									
New application		640.00		640.00	704.00		704.00	10.0	Discretionary
Renewal		640.00		640.00	704.00		704.00	10.0	Discretionary
Copy of Licence		10.50		10.50	11.50		11.50	9.5	Discretionary

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

SERVICE: COMMERCIAL WASTE

COMMERCIAL WASTE	UNIT	Charges 22/23			Proposed charges 23/24			% Change	Basis for charging
		Basic (£)	VAT (£)	Total (£)	Basic (£)	VAT (£)	Total (£)		
Commercial Waste									
General Waste 1100L bin	Per bin	21.67	0.00	21.67	23.84	0.00	23.84	10.0	Statutory
General Waste 770L bin	Per bin	19.05	0.00	19.05	20.96	0.00	20.96	10.0	Statutory
General Waste 360L bin	Per bin	11.73	0.00	11.73	12.89	0.00	12.89	9.9	Statutory
General Waste 240L bin	Per bin	10.39	0.00	10.39	11.43	0.00	11.43	10.0	Statutory
Mixed Recycling 1280L bin	Per bin	14.03	0.00	14.03	15.43	0.00	15.43	10.0	Statutory
Mixed Recycling 240L bin	Per bin	5.41	0.00	5.41	5.95	0.00	5.95	10.0	Statutory
General Waste bags – per roll of 25 bags (Minimum 2 rolls)	Per roll	67.54	0.00	67.54	67.56	0.00	67.56	0.0	Statutory
Mixed Recycling bags – per roll of 10 bags (Minimum 2 rolls)	Per roll	14.06	0.00	14.06	15.47	0.00	15.47	10.0	Statutory

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

SERVICE: GARDEN WASTE

GARDEN WASTE	UNIT	Basic (£)	VAT (£)	Total (£)	Basic (£)	VAT (£)	Total (£)	% Change	Basis for charging
Garden Waste									
Garden Waste	Per Bin	85.00	0.00	85.00	93.50	0.00	93.50	10.00%	Statutory

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

SERVICE: PARKING

RESIDENT PERMITS

Emissions Based Band	Resident Permits - Current		Petrol Vehicles						Diesel Vehicles					
	# of vehicles in each band	% of total vehicles in each band	Daily Permit Price	Permit Price (3 months)	Permit Price (6 months)	Permit Price (12 months)	# of petrol vehicles in band	% of all petrol vehicles in band	Daily Permit Price	Permit Price (3 months)	Permit Price (6 months)	Permit Price (12 months)	# of diesel vehicles in band	% of all diesel vehicles in band
1	853	11%	£0.23	£18.00	£35.00	£70.00	766	12%	£0.39	£30.00	£60.00	£120.00	87	7%
2	692	9%	£0.28	£22.00	£42.50	£85.00	508	8%	£0.44	£34.00	£67.00	£135.00	184	14%
3	954	12%	£0.33	£25.00	£50.00	£100.00	771	12%	£0.49	£37.00	£75.00	£150.00	183	14%
4	984	13%	£0.38	£29.00	£57.50	£115.00	830	13%	£0.54	£41.00	£82.00	£165.00	154	12%
5	920	12%	£0.43	£33.00	£65.00	£130.00	780	12%	£0.59	£45.00	£90.00	£180.00	140	11%
6	839	11%	£0.48	£37.00	£72.50	£145.00	719	11%	£0.64	£49.00	£97.00	£195.00	120	9%
7	934	12%	£0.53	£40.00	£80.00	£160.00	786	12%	£0.69	£52.00	£105.00	£210.00	148	11%
8	411	5%	£0.58	£44.00	£87.50	£175.00	338	5%	£0.74	£56.00	£112.00	£225.00	73	5%
9	306	4%	£0.63	£48.00	£95.00	£190.00	242	4%	£0.79	£60.00	£120.00	£240.00	64	5%
10	353	5%	£0.67	£52.00	£102.50	£205.00	304	5%	£0.84	£64.00	£127.00	£255.00	49	4%
11	305	4%	£0.72	£55.00	£110.00	£220.00	217	3%	£0.89	£67.00	£135.00	£270.00	88	7%
12	117	2%	£0.77	£59.00	£117.50	£235.00	92	1%	£0.94	£71.00	£142.00	£285.00	25	2%
13	114	1%	£0.82	£63.00	£125.00	£250.00	97	2%	£0.99	£75.00	£150.00	£300.00	17	1%
			7782				6450						133	
													2	

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

Resident Permits - Proposed
Increase by 10%

Emissions Based Band	# of vehicles in each band	% of total vehicles in each band	Petrol Vehicles				Diesel Vehicles				# of diesel vehicles in band	% of all diesel vehicles in band	
			Daily Permit Price	Permit Price (3 months)	Permit Price (6 months)	Permit Price (12 months)	# of petrol vehicles in band	% of all petrol vehicles in band	Daily Permit Price	Permit Price (3 months)	Permit Price (6 months)	Permit Price (12 months)	
0	251	3%	£0.13	£9.63	£19.25	£38.50	251	4%	-	-	-	-	0 0%
1	603	8%	£0.25	£19.25	£38.50	£77.00	516	8%	£0.66	£36.75	£73.50	£147.00	87 7%
2	692	9%	£0.31	£23.38	£46.75	£93.50	508	8%	£0.72	£40.88	£81.75	£163.50	184 14%
3	954	12%	£0.36	£27.50	£55.00	£110.00	771	12%	£0.77	£45.00	£90.00	£180.00	183 14%
4	984	13%	£0.42	£31.63	£63.25	£126.50	830	13%	£0.83	£49.13	£98.25	£196.50	154 12%
5	920	12%	£0.47	£35.75	£71.50	£143.00	780	12%	£0.88	£53.25	£106.50	£213.00	140 11%
6	839	11%	£0.52	£39.88	£79.75	£159.50	719	11%	£0.94	£57.38	£114.75	£229.50	120 9%
7	934	12%	£0.58	£44.00	£88.00	£176.00	786	12%	£0.99	£61.50	£123.00	£246.00	148 11%
8	411	5%	£0.63	£48.13	£96.25	£192.50	338	5%	£1.04	£65.63	£131.25	£262.50	73 5%
9	306	4%	£0.69	£52.25	£104.50	£209.00	242	4%	£1.10	£69.75	£139.50	£279.00	64 5%
10	353	5%	£0.74	£56.38	£112.75	£225.50	304	5%	£1.15	£73.88	£147.75	£295.50	49 4%
11	305	4%	£0.80	£60.50	£121.00	£242.00	217	3%	£1.21	£78.00	£156.00	£312.00	88 7%
12	117	2%	£0.85	£64.63	£129.25	£258.50	92	1%	£1.26	£82.13	£164.25	£328.50	25 2%
13	114	1%	£0.90	£68.75	£137.50	£275.00	97	2%	£1.32	£86.25	£172.50	£345.00	17 1%
			7783				6451					133	
												2	

VISITOR VOUCHERS

VISITOR VOUCHERS		
DURATION	EXISTING TARIFF	PROPOSED NEW TARIFF
1 Hour	£1.60	£1.80
5 Hour	£3.20	£4.50
1 Day	£6.40	£7.00

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

1 Week	£25.50	£30.00
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BUSINESS PERMITS

Business Permits

Emissions Based Band	# of vehicles in each band	% of total vehicles in each band	Petrol Vehicles						Diesel Vehicles					
			Daily Permit Price	Permit Price (3 months)	Permit Price (6 months)	Permit Price (12 months)	# of petrol vehicles in band	% of all petrol vehicles in band	Daily Permit Price	Permit Price (3 months)	Permit Price (6 months)	Permit Price (12 months)	# of diesel vehicles in band	% of all diesel vehicles in band
1	54	13%	£1.15	£87.50	£175.00	£350.00	53	16%	£1.32	£100.00	£200	£400.00	2	2%
2	38	9%	£1.32	£100.00	£200.00	£400.00	26	8%	£1.48	£112.50	£225	£450.00	12	16%
3	57	14%	£1.48	£112.50	£225.00	£450.00	41	12%	£1.64	£125.00	£250	£500.00	17	22%
4	74	18%	£1.64	£125.00	£250.00	£500.00	63	19%	£1.81	£137.50	£275	£550.00	11	14%
5	57	14%	£1.81	£137.50	£275.00	£550.00	47	14%	£1.97	£150.00	£300	£600.00	11	14%
6	39	10%	£1.97	£150.00	£300.00	£600.00	33	10%	£2.14	£162.50	£325	£650.00	6	8%
7	47	11%	£2.14	£162.50	£325.00	£650.00	39	12%	£2.30	£175.00	£350	£700.00	8	10%
8	14	3%	£2.30	£175.00	£350.00	£700.00	9	3%	£2.47	£187.50	£375	£750.00	5	6%
9	14	3%	£2.47	£187.50	£375.00	£750.00	12	4%	£2.63	£200.00	£400	£800.00	2	2%
10	5	1%	£2.63	£200.00	£400.00	£800.00	5	1%	£2.80	£212.50	£425	£850.00	0	0%
11	6	1%	£2.80	£212.50	£425.00	£850.00	3	1%	£2.96	£225.00	£450	£900.00	3	4%
12	2	0%	£2.96	£225.00	£450.00	£900.00	2	0%	£3.13	£237.50	£475	£950.00	0	0%
13	3	1%	£3.13	£237.50	£475.00	£950.00	3	1%	£3.29	£250.00	£500	£1,000.00	0	0%
			407				333						74	

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

Business Permit - Proposed

Emissions Based Band	# of vehicles in each band	% of total vehicles in each band	Petrol Vehicles					# of petrol vehicles in band	% of all petrol vehicles in band	Daily Permit Price	Permit Price (3 months)
			Daily Permit Price	Permit Price (3 months)	Permit Price (6 months)	Permit Price (12 months)					
0	13	3%	£0.17	-	-	£50.00	13	4%	£0.00	-	
1	42	10%	£1.23	£96.25	£192.50	£385.00	40	12%	£1.46	£56.88	
2	38	9%	£1.41	£110.00	£220.00	£440.00	26	8%	£1.63	£63.75	
3	57	14%	£1.59	£123.75	£247.50	£495.00	41	12%	£1.81	£70.63	
4	74	18%	£1.76	£137.50	£275.00	£550.00	63	19%	£1.99	£77.50	
5	57	14%	£1.94	£151.25	£302.50	£605.00	47	14%	£2.16	£84.38	
6	39	10%	£2.12	£165.00	£330.00	£660.00	33	10%	£2.34	£91.25	
7	47	11%	£2.29	£178.75	£357.50	£715.00	39	12%	£2.52	£98.13	
8	14	3%	£2.47	£192.50	£385.00	£770.00	9	3%	£2.69	£105.00	
9	14	3%	£2.64	£206.25	£412.50	£825.00	12	4%	£2.87	£111.88	
10	5	1%	£2.82	£220.00	£440.00	£880.00	5	1%	£3.04	£118.75	
11	6	1%	£3.00	£233.75	£467.50	£935.00	3	1%	£3.22	£125.63	
12	2	0%	£3.17	£247.50	£495.00	£990.00	2	0%	£3.40	£132.50	
13	3	1%	£3.35	£261.25	£522.50	£1,045.00	3	1%	£3.57	£139.38	
			407				334				

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

ALL ZONE BUSINESS PERMITS

Business Zone Permits

Emissions Based Band	# of vehicles in each band	% of total vehicles in each band	Daily Permit Price	Petrol Vehicles			Diesel Vehicles			
				Permit Price (12 months)	# of petrol vehicles in band	% of all petrol vehicles in band	Daily Permit Price	Permit Price (12 months)	# of diesel vehicles in band	% of all diesel vehicles in band
1	64	15%	£2.08	£650.00	62	34%	£2.24	£700.00	2	1%
2	27	7%	£2.24	£700.00	21	12%	£2.40	£750.00	6	3%
3	24	6%	£2.40	£750.00	11	6%	£2.56	£800.00	14	6%
4	72	17%	£2.56	£800.00	32	17%	£2.72	£850.00	41	18%
5	30	7%	£2.72	£850.00	21	12%	£2.88	£900.00	9	4%
6	17	4%	£2.88	£900.00	9	5%	£3.04	£950.00	8	3%
7	53	13%	£3.04	£950.00	9	5%	£3.21	£1,000.00	44	19%
8	36	9%	£3.21	£1,000.00	6	3%	£3.37	£1,050.00	30	13%
9	36	9%	£3.37	£1,050.00	5	2%	£3.53	£1,100.00	32	14%
10	11	3%	£3.53	£1,100.00	0	0%	£3.69	£1,150.00	11	5%
11	38	9%	£3.69	£1,150.00	3	2%	£3.85	£1,200.00	35	15%
12	3	1%	£3.85	£1,200.00	2	1%	£4.01	£1,250.00	2	1%
13	3	1%	£4.01	£1,250.00	3	2%	£4.17	£1,300.00	0	0%
			412				182			

APPENDICES W1 to Z4 2023/24 BUDGET REPORT

Business Zone Permits - Proposed
Increase by 10%

Emissions Based Band	Petrol Vehicles					Diesel Vehicles				
	# of vehicles in each band	% of total vehicles in each band	Daily Permit Price	Permit Price (12 months)	# of petrol vehicles in band	% of all petrol vehicles in band	Daily Permit Price	Permit Price (12 months)	# of diesel vehicles in band	% of all diesel vehicles in band
0	9	2%	£1.15	£357.50	9	5%			0	0%
1	55	13%	£2.29	£715.00	53	29%	£2.52	£785.00	2	1%
2	27	7%	£2.47	£770.00	21	12%	£2.69	£840.00	6	3%
3	24	6%	£2.64	£825.00	11	6%	£2.87	£895.00	14	6%
4	72	17%	£2.82	£880.00	32	17%	£3.04	£950.00	41	18%
5	30	7%	£3.00	£935.00	21	12%	£3.22	£1,005.00	9	4%
6	17	4%	£3.17	£990.00	9	5%	£3.40	£1,060.00	8	3%
7	53	13%	£3.35	£1,045.00	9	5%	£3.57	£1,115.00	44	19%
8	36	9%	£3.53	£1,100.00	6	3%	£3.75	£1,170.00	30	13%
9	36	9%	£3.70	£1,155.00	5	2%	£3.93	£1,225.00	32	14%
10	11	3%	£3.88	£1,210.00	0	0%	£4.10	£1,280.00	11	5%
11	38	9%	£4.05	£1,265.00	3	2%	£4.28	£1,335.00	35	15%
12	3	1%	£4.23	£1,320.00	2	1%	£4.46	£1,390.00	2	1%
13	3	1%	£4.41	£1,375.00	3	2%	£4.63	£1,445.00	0	0%
	412				182				230	

COMMUNITY HEALTH PERMITS

Community Health Permits
– Current

Petrol Vehicles

Diesel Vehicles

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

Emissions Based Band	# of vehicles in each band	% of total vehicles in each band	Daily Permit Price	Permit Price (12 months)	# of petrol vehicles in band	% of all petrol vehicles in band	Daily Permit Price	Permit Price (12 months)	# of diesel vehicles in band	% of all diesel vehicles in band
1	66	10%	£0.22	£70.00	59	10%	£0.38	£120.00	8	10%
2	56	8%	£0.27	£85.00	47	8%	£0.43	£135.00	9	13%
3	108	16%	£0.32	£100.00	102	17%	£0.48	£150.00	6	8%
4	128	19%	£0.37	£115.00	116	19%	£0.53	£165.00	12	17%
5	96	14%	£0.42	£130.00	90	15%	£0.58	£180.00	6	8%
6	74	11%	£0.46	£145.00	68	11%	£0.63	£195.00	6	8%
7	68	10%	£0.51	£160.00	60	10%	£0.67	£210.00	8	10%
8	30	4%	£0.56	£175.00	24	4%	£0.72	£225.00	6	8%
9	20	3%	£0.61	£190.00	15	2%	£0.77	£240.00	5	6%
10	17	2%	£0.66	£205.00	14	2%	£0.82	£255.00	3	4%
11	6	1%	£0.71	£220.00	6	1%	£0.87	£270.00	0	0%
12	6	1%	£0.75	£235.00	3	0%	£0.91	£285.00	3	4%
13	5	1%	£0.80	£250.00	3	0%	£0.96	£300.00	2	2%
677				605					72	

Community Health Permits - Proposed

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Petrol Vehicles

Diesel Vehicles

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

Emissions Based Band	# of vehicles in each band	% of total vehicles in each band	Daily Permit Price	Permit Price (12 months)	# of petrol vehicles in band	% of all petrol vehicles in band	Daily Permit Price	Permit Price (12 months)	# of diesel vehicles in band	% of all diesel vehicles in band
0	11	0%	£0.87	£270.00	11	2%			0	0%
1	56	8%	£1.23	£385.00	48	8%	£1.46	£455.00	8	10%
2	56	8%	£1.41	£440.00	47	8%	£1.63	£510.00	9	13%
3	108	16%	£1.59	£495.00	102	17%	£1.81	£565.00	6	8%
4	128	19%	£1.76	£550.00	116	19%	£1.99	£620.00	12	17%
5	96	14%	£1.94	£605.00	90	15%	£2.16	£675.00	6	8%
6	74	11%	£2.12	£660.00	68	11%	£2.34	£730.00	6	8%
7	68	10%	£2.29	£715.00	60	10%	£2.52	£785.00	8	10%
8	30	5%	£2.47	£770.00	24	4%	£2.69	£840.00	6	8%
9	20	3%	£2.64	£825.00	15	2%	£2.87	£895.00	5	6%
10	17	2%	£2.82	£880.00	14	2%	£3.04	£950.00	3	4%
11	6	1%	£3.00	£935.00	6	1%	£3.22	£1,005.00	0	0%
12	6	1%	£3.17	£990.00	3	0%	£3.40	£1,060.00	3	4%
13	5	1%	£3.35	£1,045.00	3	0%	£3.57	£1,115.00	2	2%
	677				605				72	

HOSPITAL PERMITS

Hospital Permits



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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

Emissions Based Band	# of vehicles in each band	% of total vehicles in each band	Daily Permit Price	Permit Price (12 months)	# of petrol vehicles in band	% of all petrol vehicles in band	Daily Permit Price	Permit Price (12 months)	# of diesel vehicles in band	% of all diesel vehicles in band
1	29	29%	£1.12	£350.00	26	31%	£1.28	£400.00	3	17%
2	5	5%	£1.28	£400.00	3	4%	£1.44	£450.00	2	8%
3	20	20%	£1.44	£450.00	17	20%	£1.60	£500.00	3	17%
4	20	20%	£1.60	£500.00	18	22%	£1.76	£550.00	2	8%
5	9	9%	£1.76	£550.00	6	7%	£1.92	£600.00	3	17%
6	6	6%	£1.92	£600.00	5	6%	£2.08	£650.00	2	8%
7	6	6%	£2.08	£650.00	3	4%	£2.24	£700.00	3	17%
8	3	3%	£2.24	£700.00	3	4%	£2.40	£750.00	0	0%
9	2	2%	£2.40	£750.00	0	0%	£2.56	£800.00	2	8%
10	2	2%	£2.56	£800.00	2	2%	£2.72	£850.00	0	0%
11	0	0%	£2.72	£850.00	0	0%	£2.88	£900.00	0	0%
12	0	0%	£2.88	£900.00	0	0%	£3.04	£950.00	0	0%
13	0	0%	£3.04	£950.00	0	0%	£3.21	£1,000.00	0	0%
	99				81				18	

Hospital Permits - Proposed

Emissions Based Band	# of vehicles in each band	% of total vehicles in each band	Petrol Vehicles			Diesel Vehicles				
			Daily Permit Price	Permit Price (12 months)	# of petrol vehicles in band	% of all petrol vehicles in band	Daily Permit Price	Permit Price (12 months)	# of diesel vehicles in band	% of all diesel vehicles in band
0	3	3%	£0.87	£270	3	4%			0	0%

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

1	26	26%	£1.23	£385	23	28%	£1.46	£455	3	17%
2	5	5%	£1.41	£440	3	4%	£1.63	£510	2	8%
3	20	20%	£1.59	£495	17	20%	£1.81	£565	3	17%
4	20	20%	£1.76	£550	18	22%	£1.99	£620	2	8%
5	9	9%	£1.94	£605	6	7%	£2.16	£675	3	17%
6	6	6%	£2.12	£660	5	6%	£2.34	£730	2	8%
7	6	6%	£2.29	£715	3	4%	£2.52	£785	3	17%
8	3	3%	£2.47	£770	3	4%	£2.69	£840	0	0%
9	2	2%	£2.64	£825	0	0%	£2.87	£895	2	8%
10	2	2%	£2.82	£880	2	2%	£3.04	£950	0	0%
11	0	0%	£3.00	£935	0	0%	£3.22	£1,005	0	0%
12	0	0%	£3.17	£990	0	0%	£3.40	£1,060	0	0%
13	0	0%	£3.35	£1,045	0	0%	£3.57	£1,115	0	0%
100				82				18		

STAFF ANNUAL PERMITS

Staff
Permits -
Current

Emissions Based Band	Petrol Vehicles			Daily Permit Price	Permit Price (12 months)	# of petrol vehicles in band	% of all petrol vehicles in band	Diesel Vehicles		
	# of vehicles in each band	% of total vehicles in each band	Daily Permit Price					Permit Price (12 months)	# of diesel vehicles in band	% of all diesel vehicles in band
1	4	2%	£1.35	£350.00	2	4%	£1.54	£400.00	2	2%
2	16	11%	£1.54	£400.00	8	15%	£1.73	£450.00	8	9%
3	20	14%	£1.73	£450.00	3	5%	£1.92	£500.00	17	19%

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

4	23	16%	£1.92	£500.00	9	16%	£2.12	£550.00	14	16%
5	18	12%	£2.12	£550.00	8	14%	£2.31	£600.00	10	11%
6	16	11%	£2.31	£600.00	9	16%	£2.50	£650.00	7	8%
7	19	13%	£2.50	£650.00	9	16%	£2.69	£700.00	10	11%
8	9	6%	£2.69	£700.00	5	8%	£2.88	£750.00	4	4%
9	5	3%	£2.88	£750.00	0	0%	£3.08	£800.00	5	6%
10	8	6%	£3.08	£800.00	3	5%	£3.27	£850.00	5	6%
11	4	3%	£3.27	£850.00	0	0%	£3.46	£900.00	4	4%
12	2	1%	£3.46	£900.00	0	0%	£3.65	£950.00	2	2%
13	2	1%	£3.13	£950.00	0	0%	£3.85	£1,000	2	2%
	145			55					90	

Staff Annual Permits -
Proposed

Emissions Based Band	Petrol Vehicles			Diesel Vehicles						
	# of vehicles in each band	% of total vehicles in each band	Daily Permit Price	Permit Price (12 months)	# of petrol vehicles in band	% of all petrol vehicles in band	Daily Permit Price	Permit Price (12 months)	# of diesel vehicles in band	% of all diesel vehicles in band
0	0	0%	£0.74	£192.50	0	0%			0	0%
1	4	2%	£1.48	£385.00	2	4%	£1.75	£455.00	2	2%
2	16	11%	£1.69	£440.00	8	15%	£1.96	£510.00	8	9%
3	20	14%	£1.90	£495.00	3	5%	£2.17	£565.00	17	19%
4	23	16%	£2.12	£550.00	9	16%	£2.38	£620.00	14	16%
5	18	12%	£2.33	£605.00	8	14%	£2.60	£675.00	10	11%
6	16	11%	£2.54	£660.00	9	16%	£2.81	£730.00	7	8%

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

7	19	13%	£2.75	£715.00	9	16%	£3.02	£785.00	10	11%
8	9	6%	£2.96	£770.00	5	8%	£3.23	£840.00	4	4%
9	5	3%	£3.17	£825.00	0	0%	£3.44	£895.00	5	6%
10	8	6%	£3.38	£880.00	3	5%	£3.65	£950.00	5	6%
11	4	3%	£3.60	£935.00	0	0%	£3.87	£1,005.00	4	4%
12	2	1%	£3.81	£990.00	0	0%	£4.08	£1,060.00	2	2%
13	2	1%	£4.02	£1,045.00	0	0%	£4.29	£1,115.00	2	2%
145				55					90	

STAFF DAILY PERMITS

Staff Daily Permits

Emissions Based Band	# of vehicles in each band	% of total vehicles in each band	Petrol Vehicles			Permit Price	# of petrol vehicles in band	% of all petrol vehicles in band	Diesel Vehicles		
			Permit Price	# of petrol vehicles in band	% of all petrol vehicles in band				Permit Price	# of diesel vehicles in band	% of all diesel vehicles in band
1	287	6%	£1.35	246	6%	£1.54	41	5%			
2	294	6%	£1.54	225	6%	£1.73	69	8%			
3	785	16%	£1.73	546	14%	£1.92	239	27%			
4	705	14%	£1.92	611	15%	£2.12	95	11%			
5	766	16%	£2.12	611	15%	£2.31	155	18%			
6	697	14%	£2.31	620	15%	£2.50	77	9%			
7	678	14%	£2.50	546	14%	£2.69	132	15%			
8	275	6%	£2.69	261	7%	£2.88	14	2%			
9	132	3%	£2.88	120	3%	£3.08	12	1%			
10	180	4%	£3.08	159	4%	£3.27	21	2%			
11	60	1%	£3.27	45	1%	£3.46	15	2%			
12	3	0%	£3.46	0	0%	£3.65	3	0%			
13	22	0%	£3.65	20	0%	£3.85	2	0%			
4882				4010					872		

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

Staff Daily Permits - Proposed

Emissions Based Band	# of vehicles in each band	% of total vehicles in each band	Petrol Vehicles			Diesel Vehicles		
			Permit Price	# of petrol vehicles in band	% of all petrol vehicles in band	Permit Price	# of diesel vehicles in band	% of all diesel vehicles in band
0	53	1%	£0.74	53	1%		0	0%
1	234	5%	£1.48	193	5%	£1.75	41	5%
2	294	6%	£1.69	225	6%	£1.96	69	8%
3	785	16%	£1.90	546	14%	£2.17	239	27%
4	705	14%	£2.12	611	15%	£2.38	95	11%
5	766	16%	£2.33	611	15%	£2.60	155	18%
6	697	14%	£2.54	620	15%	£2.81	77	9%
7	678	14%	£2.75	546	14%	£3.02	132	15%
8	275	6%	£2.96	261	7%	£3.23	14	2%
9	132	3%	£3.17	120	3%	£3.44	12	1%
10	180	4%	£3.38	159	4%	£3.65	21	2%
11	60	1%	£3.60	45	1%	£3.87	15	2%
12	3	0%	£3.81	0	0%	£4.08	3	0%
13	22	0%	£4.02	20	0%	£4.29	2	0%
			4882	4010			872	

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

PAY BY PHONE

Pay By
Phone

Emissions Based Band	Petrol Vehicles			Diesel Vehicles				
	# of vehicles in each band	% of total vehicles in each band	Price Inc 0.10 (P/H)	# of petrol vehicles in band	% of all petrol vehicles in band	Current Price (P/H)	# of diesel vehicles in band	% of all diesel vehicles in band
1	27040	17%	£1.50	19410	13%	£1.60	5986	8%
2	48617	31%	£2.00	48616	33%	£2.10	25498	36%
3	53356	34%	£2.50	53355	36%	£2.60	22053	31%
4	19273	12%	£3.00	19272	13%	£3.10	13388	19%
5	7086	5%	£3.50	7086	5%	£3.60	4169	6%
	155372			147739			71094	

Pay By Phone - Proposed EV

1

Emissions Based Band	Petrol Vehicles				Diesel Vehicles					
	# of vehicles in each band	% of total vehicles in each band	Price Inc 0.10 (P/H)	15-minute intervals for first hour, thereafter hourly rate applies	# of petrol vehicles in band	% of all petrol vehicles in band	Current Price (P/H)	15-minute intervals for first hour, thereafter hourly rate applies	# of diesel vehicles in band	% of all diesel vehicles in band
0	7630	1%	£1.50	£0.38	7630	2%	-	-	0	0%
1	72103	13%	£2.00	£0.50	57736	15%	£2.10	£0.53	14366	8%
2	177876	33%	£2.40	£0.60	116681	31%	£2.54	£0.64	61195	36%
3	180982	33%	£2.90	£0.73	128054	34%	£3.19	£0.80	52927	31%

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

4	78386	14%	£3.30	£0.83	46255	12%	£3.63	£0.91	32131	19%
5	27017	5%	£4.00	£1.00	17011	5%	£4.40	£1.10	10006	6%
	543994				373368				170626	

SUSPENSIONS

SUSPENSIONS				
TYPE	EXISTING FEE	PROPOSED FEE	EXISTING ADMIN FEE	PROPOSED ADMIN FEE
P & D Bays	£30	£50	£50	£55
Resident Bay	£50	£55	£50	£55

HOUSING ESTATE PERMITS

Housing Permits Projection - 50% of Residence On Street Prices Phased over 2 Years

Housing Permits Projection - 1st Year

		<i>Petrol</i>	<i>Diesel</i>
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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

Emissions Based Band	# of vehicles in each band	% of total vehicles in each band	Permit Price (12 months)	# of petrol vehicles in band	% of all petrol vehicles in band	Permit Price (12 months)	# of diesel vehicles in band	% of all diesel vehicles in band
0	-	-	8.75	-	-	19.25	-	-
1	131	9%	£17.50	114	9%	£35.00	17	7%
2	127	9%	£21.25	81	7%	£38.75	46	20%
3	113	8%	£25.00	78	6%	£42.50	35	15%
4	179	12%	£28.75	152	12%	£46.25	27	12%
5	196	13%	£32.50	158	13%	£50.00	38	16%
6	180	12%	£36.25	161	13%	£53.75	19	8%
7	201	14%	£40.00	185	15%	£57.50	16	7%
8	81	6%	£43.75	71	6%	£61.25	10	4%
9	56	4%	£47.50	52	4%	£65.00	4	2%
10	97	7%	£51.25	87	7%	£68.75	10	4%
11	35	2%	£55.00	32	3%	£72.50	3	1%
12	23	2%	£58.75	19	2%	£76.25	4	2%
13	44	3%	£62.50	27	2%	£80.00	2	1%
Total	1463			1217			231	

Housing Permits Projection - 2nd Year

Emissions Based Band	# of vehicles in each band	% of total vehicles in each band	Petrol			Diesel		
			Permit Price (12 months)	# of petrol vehicles in band	% of all petrol vehicles in band	Permit Price (12 months)	# of diesel vehicles in band	% of all diesel vehicles in band
0	-	-	17.5	-	-	-	-	-
1	131	9%	£35.00	114	9%	£70.00	17	7%

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

2	127	9%	£42.50	81	7%	£77.50	46	20%
3	113	8%	£50.00	78	6%	£85.00	35	15%
4	179	12%	£57.50	152	12%	£92.50	27	12%
5	196	13%	£65.00	158	13%	£100.00	38	16%
6	180	12%	£72.50	161	13%	£107.50	19	8%
7	201	14%	£80.00	185	15%	£115.00	16	7%
8	81	6%	£87.50	71	6%	£122.50	10	4%
9	56	4%	£95.00	52	4%	£130.00	4	2%
10	97	7%	£102.50	87	7%	£137.50	10	4%
11	35	2%	£110.00	32	3%	£145.00	3	1%
12	23	2%	£117.50	19	2%	£152.50	4	2%
13	44	3%	£125.00	27	2%	£160.00	2	1%
Total	1463			1217			231	

Below are the current prices for housing estate permits.

NAME OF ESTATE	CPZ NAME	RESIDENTS PERMIT PRICE PER YEAR
Adolphus Estate	Adolphus Estate	£10
Allison Close	Allison Close	£12
Benden House	Benden House	£12
Blessington Road	Blessington Road	N/A
Burnett & Lacey Houses	Burnett & Lacey Houses	£12
Cedar/Cypress Houses-Kender	Cedar/Cypress Houses-Kender	£10

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

Clarendon Rise-Gilmore	Clarendon Rise-Gilmore	£12
Crossfields Estate	Crossfields Estate	£10
Dacre Park Estate	Dacre Park Estate	£12
Eddystone Tower	Eddystone Tower	£10
Eliot Park	Eliot Park	£12
Evelyn Area 2	Evelyn Area 3	£10
Evelyn Area 3	Evelyn Area 4	£10
Fairfields	Fairfields	£12
Gilmore Estate	Gilmore Estate	£12
Hatfield Close - Kender	Hatfield Close - Kender	£10
Kender	Kender	£12
Lee Park	Lee Park	£12
Lovelinch Close- Winslade	Lovelinch Close- Winslade	£12
Lynch Close	Lynch Close	£10
Mercator Estate	Mercator Estate	£12
Merryfields Way	Merryfields Way	£10
New Butt Lane Estate	New Butt Lane Estate	£10
Paynell Court	Paynell Court	£12
Rawlinson House	Rawlinson House	£12
Rowan/Murtle Houses- Kender	Rowan/Murtle Houses- Kender	£10
Ryculff Square	Ryculff Square	£12
Saxton Close- Mercator	Saxton Close- Mercator	£10
Sayes Court Estate	Sayes Court Estate	£10
Tanners Hill Estate	Tanners Hill Estate	£10
The Aviary	The Aviary	£10
The Colonnade	The Colonnade	£10
Vaughan Williams Close	Vaughan Williams Close	£10
Winslade Estate	Winslade Estate	£10

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

Wright Close and Trinity Close-Gilmore	Wright Close and Trinity Close-Gilmore	£12
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NAME OF ESTATE	RESIDENTS PERMIT PRICE PER YEAR
Dressington Avenue/Rushey Mead	£12
Viney Road	£30
Wadcroft	£30

Housing Visitor Voucher

The proposed prices for Housing Visitor Vouchers will be the same as the proposed charges for on-street Resident Visitor Vouchers.

Below are the proposed Housing Visitor permit prices:

Housing Visitor Vouchers - Proposed

Duration	New Tariff
1Hour	£ 1.80
5Hour	£4.50
1Day	£7.00
1Week	£30.00

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

Below are the current Housing Visitor permit prices.

NAME OF ESTATE	CPZ NAME	VISITORS PERMIT PRICE PER YEAR	VISITORS PERMIT PRICE FOR 24 HOURS
Adolphus Estate	Adolphus Estate	N/A	£3 for 12 slots (25p per visit)
Allison Close	Allison Close	£6	TBC
Benden House	Benden House	£6	N/A
Blessington Road	Blessington Road	No parking zone	No parking zone
Burnett & Lacey Houses	Burnett & Lacey Houses	£6	£3 for 12 slots (25p per visit)
Cedar/Cypress Houses-Kender	Cedar/Cypress Houses-Kender	£5	N/A
Clarendon Rise-Gilmore	Clarendon Rise-Gilmore	£6	N/A
Crossfields Estate	Crossfields Estate	N/A	£3 for 12 slots (25p per visit)
Dacre Park Estate	Dacre Park Estate	£6	N/A
Eddystone Tower	Eddystone Tower	No visitor permits	No visitors permits
Eliot Park	Eliot Park	£6	N/A
Evelyn Area 2	Evelyn Area 3	N/A	£3 for 12 slots (25p per visit)
Evelyn Area 3	Evelyn Area 4	N/A	£3 for 12 slots (25p per visit)
Fairfields	Fairfields	£6	£3 for 12 slots (25p per visit)
Gilmore Estate	Gilmore Estate	£6	N/A
Hatfield Close - Kender	Hatfield Close - Kender	£5	£3 for 12 slots (25p per visit)
Kender	Kender	£6	£3 for 12 slots (25p per visit)
Lee Park	Lee Park	£6	N/A
Lovelinch Close-Winslade	Lovelinch Close-Winslade	£6	N/A
Lynch Close	Lynch Close	£6	£3 for 12 slots (25p per visit)
Mercator Estate	Mercator Estate	£6	N/A
Merryfields Way	Merryfields Way	N/A	£3 for 12 slots (25p per visit)
New Butt Lane Estate	New Butt Lane Estate	N/A	£3 for 12 slots (25p per visit)

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

NAME OF ESTATE	CPZ NAME	VISITORS PERMIT PRICE PER YEAR	VISITORS PERMIT PRICE FOR 24 HOURS
Paynell Court	Paynell Court	£6	N/A
Rawlinson House	Rawlinson House	£6	N/A
Rowan/Murtle Houses-Kender	Rowan/Murtle Houses-Kender	£5	N/A
Ryculff Square	Ryculff Square	£6	N/A
Saxton Close- Mercator	Saxton Close- Mercator	N/A	£3 for 12 slots (25p per visit)
Sayes Court Estate	Sayes Court Estate	N/A	£3 for 12 slots (25p per visit)
Tanners Hill Estate	Tanners Hill Estate	N/A	£3 for 12 slots (25p per visit)
The Aviary	The Aviary	£5	£3 for 12 slots (25p per visit)
The Colonnade	The Colonnade	N/A	£3 for 12 slots (25p per visit)
Vaughan Williams Close	Vaughan Williams Close	N/A	£3 for 12 slots (25p per visit)
Winslade Estate	Winslade Estate	N/A	£3 for 12 slots (25p per visit)
Wright Close and Trinity Close-Gilmore	Wright Close and Trinity Close-Gilmore	£6	N/A

NAME OF ESTATE		VISITORS PERMIT PRICE PER YEAR	
Dressington Avenue/Rushey Mead		£6	
Viney Road		£5 for 10 slots	
Wadcroft		£5 for 10 slots	

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

Off-Street Car Parks

Emissions Based Band	<i>Petrol Vehicles</i>					<i>Diesel Vehicles</i>				
	# of vehicles in each band	% of total vehicles in each band	Price Inc 0.10 (P/H)	15 minute intervals for first hour, thereafter hourly rate applies	# of petrol vehicles in band	% of all petrol vehicles in band	Current Price (P/H)	15 minute intervals for first hour, thereafter hourly rate applies	# of diesel vehicles in band	% of all diesel vehicles in band
0	7630	1%	£1.50	£0.38	7630	2%	-	-	0	0%
1	72103	13%	£2.00	£0.50	57736	15%	£2.10	£0.53	14366	8%
2	177876	33%	£2.40	£0.60	116681	31%	£2.54	£0.64	61195	36%
3	180982	33%	£2.90	£0.73	128054	34%	£3.19	£0.80	52927	31%
4	78386	14%	£3.30	£0.83	46255	12%	£3.63	£0.91	32131	19%
5	27017	5%	£4.00	£1.00	17011	5%	£4.40	£1.10	10006	6%
	543994				373368				170626	

*the above tariff can be paid in 15 minute intervals for the first hour, then hourly charges apply only

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

Current Charge										
Duration	Emmisions					Emissions - non-Euro 6				
	0-100	101-130	131-165	166-200	201+	0-100	101-130	131-165	166-200	201+
15 Mins	£0.38	£0.50	£0.63	£0.75	£0.88	£2.38	£2.50	£2.63	£2.75	£2.88
30 Mins	£0.75	£1.00	£1.25	£1.50	£1.75	£2.75	£3.00	£3.25	£3.50	£3.75
45 Mins	£1.13	£1.50	£1.88	£2.25	£2.63	£3.13	£3.50	£3.88	£4.25	£4.63
1 Hour	£1.50	£2.00	£2.50	£3.00	£3.50	£3.50	£4.00	£4.50	£5.00	£5.50
2 Hours	£3.00	£4.00	£5.00	£6.00	£7.00	£5.00	£6.00	£7.00	£8.00	£9.00
3 Hours	£4.50	£6.00	£7.50	£9.00	£10.50	£6.50	£8.00	£9.50	£11.00	£12.50
4 Hours	£6.00	£8.00	£10.00	£12.00	£14.00	£8.00	£10.00	£12.00	£14.00	£16.00
4+ Hours (Up to all day where permitted)	£11.25	£15.00	£18.75	£22.50	£26.25	£13.25	£17.00	£20.75	£24.50	£28.25

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

Proposed Charge											
Duration	Emmisions						Emissions - non-Euro 6				
	0	1-100	101-130	131-165	166-200	201+	0-100	101-130	131-165	166-200	201+
15 Mins	£0.38	£0.50	£0.60	£0.73	£0.83	£1.00	£0.53	£0.64	£0.80	£0.91	£1.10
30 Mins	£0.76	£1.00	£1.20	£1.46	£1.66	£2.00	£1.06	£1.28	£1.60	£1.82	£2.20
45 Mins	£1.14	£1.50	£1.80	£2.19	£2.49	£3.00	£1.59	£1.92	£2.40	£2.73	£3.30
1 Hour	£1.50	£2.00	£2.40	£2.90	£3.30	£4.00	£2.10	£2.54	£3.19	£3.63	£4.40
2 Hours	£3.00	£4.00	£4.80	£5.80	£6.60	£8.00	£4.20	£5.08	£6.38	£7.26	£8.80
3 Hours	£4.50	£6.00	£7.20	£8.70	£9.90	£12.00	£6.30	£7.62	£9.57	£10.89	£13.20
4 Hours	£6.00	£8.00	£9.60	£11.60	£13.20	£16.00	£8.40	£10.16	£12.76	£14.52	£13.20
All day (where permitted P&D 2)	£12.37	£16.50	£20.63	£24.75	£29.15	£31.35	£16.50	£20.63	£24.75	£29.15	£33.55

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

SERVICE: MARKET TRADERS

MARKET TRADERS	UNIT	Charges 22/23			Proposed charges 23/24			% Change	Basis for charging
		Basic (£)	VAT (£)	Total (£)	Basic (£)	VAT (£)	Total (£)		
Markets									
Lewisham High Street Market Permanent Trading Charges (Mon-Sat)	Per Year	6330.48	0.00	6330.48	6963.53	0.00	6963.53	10.0	Statutory
Lewisham High Street Market Permanent Trading Charges (Mon-Sat)	Per Month	527.54	0.00	527.54	580.29	0.00	580.29	10.0	Statutory
Lewisham High Street Market Permanent Trading Charges (Mon-Sat)	Per Week	121.54	0.00	121.54	133.69	0.00	133.69	10.0	Statutory
Lewisham High Street Market Permanent Trading Charges (Mon-Sat)	Per Day	20.46	0.00	20.46	22.51	0.00	22.51	10.0	Statutory

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

MARKET TRADERS	UNIT	Charges 22/23			Proposed charges 23/24			% Change	Basis for charging
		Basic (£)	VAT (£)	Total (£)	Basic (£)	VAT (£)	Total (£)		
Lewisham High Street Market Permanent Trading Charges (Sun)	Per Year	1299.96	0.00	1299.96	1429.96	0.00	1429.96	10.0	Statutory
Lewisham High Street Market Permanent Trading Charges (Sun)	Per Month	108.33	0.00	108.33	119.16	0.00	119.16	10.0	Statutory
Lewisham High Street Market Permanent Trading Charges (Sun)	Per Day	25.00	0.00	25.00	27.50	0.00	27.50	10.0	Statutory
Burtons Yard Parking Charge	Yearly Charge	1028.28	0.00	1028.28	1131.11	0.00	1131.11	10.0	Statutory
Burtons Yard Parking Charge	Monthly Charge	85.69	0.00	85.69	94.26	0.00	94.26	10.0	Statutory
Burtons Yard Parking Charge	Weekly Charge	19.77	0.00	19.77	21.75	0.00	21.75	10.0	Statutory

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

MARKET TRADERS	UNIT	Charges 22/23			Proposed charges 23/24			% Change	Basis for charging
		Basic (£)	VAT (£)	Total (£)	Basic (£)	VAT (£)	Total (£)		
Burtons Yard Overnight Stall Storage	Yearly Charge	939.98	0.00	939.98	1033.98	0.00	1033.98	10.0	Statutory
Burtons Yard Overnight Stall Storage	Monthly Charge	78.33	0.00	78.33	86.16	0.00	86.16	10.0	Statutory
Burtons Yard Overnight Stall Storage	Weekly Charge	18.08	0.00	18.08	19.89	0.00	19.89	10.0	Statutory
Lewisham High Street Odds Permanent Street Trading Charges (Sunday Only)	Per Year	832.00	0.00	832.00	915.20	0.00	915.20	10.0	Statutory
Lewisham High Street Odds Permanent Street Trading Charges (Sunday Only)	Per Month	69.33	0.00	69.33	76.26	0.00	76.26	10.0	Statutory

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

MARKET TRADERS	UNIT	Charges 22/23			Proposed charges 23/24			% Change	Basis for charging
		Basic (£)	VAT (£)	Total (£)	Basic (£)	VAT (£)	Total (£)		
Lewisham High Street Odds Permanent Street Trading Charges (Sunday Only)	Per Day	16.00	0.00	16.00	17.60	0.00	17.60	10.0	Statutory
Lewisham High Street Odds Permanent Street Trading Charges (Mon-Sun)	Per Year	4576.00	0.00	4576.00	5033.60	0.00	5033.60	10.0	Statutory
Lewisham High Street Odds Permanent Street Trading Charges (Mon-Sun)	Per Month	381.33	0.00	381.33	419.46	0.00	419.46	10.0	Statutory
Lewisham High Street Odds Permanent Street Trading Charges (Mon-Sun)	Per Day	88.00	0.00	88.00	96.80	0.00	96.80	10.0	Statutory
Lewisham Sunday Market	Per Year	1300.00	0.00	1300.00	1430.00	0.00	1430.00	10.0	Statutory

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

MARKET TRADERS	UNIT	Charges 22/23			Proposed charges 23/24			% Change	Basis for charging
		Basic (£)	VAT (£)	Total (£)	Basic (£)	VAT (£)	Total (£)		
Lewisham Sunday Market	Per Month	108.33	0.00	108.33	119.16	0.00	119.16	10.0	Statutory
Lewisham Sunday Market	Per Day	25.00	0.00	25.00	27.50	0.00	27.50	10.0	Statutory
Deptford High Street Market and Giffin Square Permanent Trading Charges (Wed Only)	Per Year	1223.56	0.00	1223.56	1345.92	0.00	1345.92	10.0	Statutory
Deptford High Street Market and Giffin Square Permanent Trading Charges (Wed Only)	Per Month	101.96	0.00	101.96	112.16	0.00	112.16	10.0	Statutory
Deptford High Street Market and Giffin Square Permanent Trading Charges (Wed Only)	Per Day	23.53	0.00	23.53	25.88	0.00	25.88	10.0	Statutory

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

MARKET TRADERS	UNIT	Charges 22/23			Proposed charges 23/24			% Change	Basis for charging
		Basic (£)	VAT (£)	Total (£)	Basic (£)	VAT (£)	Total (£)		
Deptford High Street Market and Giffin Square Permanent Trading Charges (Fri Only)	Per Year	771.16	0.00	771.16	848.28	0.00	848.28	10.0	Statutory
Deptford High Street Market and Giffin Square Permanent Trading Charges (Fri Only)	Per Month	64.26	0.00	64.26	70.69	0.00	70.69	10.0	Statutory
Deptford High Street Market and Giffin Square Permanent Trading Charges (Fri Only)	Per Day	14.83	0.00	14.83	16.31	0.00	16.31	10.0	Statutory
Deptford High Street Market and Giffin Square Permanent Trading Charges (Sat Only)	Per Year	1330.16	0.00	1330.16	1463.18	0.00	1463.18	10.0	Statutory

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

MARKET TRADERS	UNIT	Charges 22/23			Proposed charges 23/24			% Change	Basis for charging
		Basic (£)	VAT (£)	Total (£)	Basic (£)	VAT (£)	Total (£)		
Deptford High Street Market and Giffin Square Permanent Trading Charges (Sat Only)	Per Month	110.85	0.00	110.85	121.94	0.00	121.94	10.0	Statutory
Deptford High Street Market and Giffin Square Permanent Trading Charges (Sat Only)	Per Day	25.58	0.00	25.58	28.14	0.00	28.14	10.0	Statutory
Deptford High Street Market and Giffin Square Permanent Trading Charges (Weekly Inc 10% discount for trading Wednesday, Friday & Saturday)	Per Year	2952.56	0.00	2952.56	3247.82	0.00	3247.82	10.0	Statutory

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

MARKET TRADERS	UNIT	Charges 22/23			Proposed charges 23/24			% Change	Basis for charging
		Basic (£)	VAT (£)	Total (£)	Basic (£)	VAT (£)	Total (£)		
Deptford High Street Market and Giffin Square Permanent Trading Charges (Weekly Inc 10% discount for trading Wednesday, Friday & Saturday)	Per Month	246.05	0.00	246.05	270.66	0.00	270.66	10.0	Statutory
Deptford High Street Market and Giffin Square Permanent Trading Charges (Weekly Inc 10% discount for trading Wednesday, Friday & Saturday)	Per Day	56.78	0.00	56.78	62.46	0.00	62.46	10.0	Statutory

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

MARKET TRADERS	UNIT	Charges 22/23			Proposed charges 23/24			% Change	Basis for charging
		Basic (£)	VAT (£)	Total (£)	Basic (£)	VAT (£)	Total (£)		
Deptford High Street Market and Giffin Square Permanent Trading Charges (Paddy Power/Hamilton Street Car Park - Small Storage)	Per Year	45.44	0.00	45.44	49.98	0.00	49.98	10.0	Statutory
Douglas Way Market Permanent Trading Charges - Per Pitch License Mon to Wed	Per Year	1090.44	0.00	1090.44	1199.48	0.00	1199.48	10.0	Statutory
Douglas Way Market Permanent Trading Charges - Per Pitch License Mon to Wed	Per Month	90.87	0.00	90.87	99.96	0.00	99.96	10.0	Statutory

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

MARKET TRADERS	UNIT	Charges 22/23			Proposed charges 23/24			% Change	Basis for charging
		Basic (£)	VAT (£)	Total (£)	Basic (£)	VAT (£)	Total (£)		
Douglas Way Market Permanent Trading Charges - Per Pitch License Mon to Wed	Per Day	20.97	0.00	20.97	23.07	0.00	23.07	10.0	Statutory
Douglas Way Market Permanent Trading Charges - Per Pitch License Thu to Fri	Per Year	771.16	0.00	771.16	848.28	0.00	848.28	10.0	Statutory
Douglas Way Market Permanent Trading Charges - Per Pitch License Thu to Fri	Per Month	64.26	0.00	64.26	70.69	0.00	70.69	10.0	Statutory
Douglas Way Market Permanent Trading Charges - Per Pitch License Thu to Fri	Per Day	14.83	0.00	14.83	16.31	0.00	16.31	10.0	Statutory

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

MARKET TRADERS	UNIT	Charges 22/23			Proposed charges 23/24			% Change	Basis for charging
		Basic (£)	VAT (£)	Total (£)	Basic (£)	VAT (£)	Total (£)		
Douglas Way Market Permanent Trading Charges - Per Pitch License Sat only	Per Year	1330.16	0.00	1330.16	1463.18	0.00	1463.18	10.0	Statutory
Douglas Way Market Permanent Trading Charges - Per Pitch License Sat only	Per Month	110.85	0.00	110.85	121.94	0.00	121.94	10.0	Statutory
Douglas Way Market Permanent Trading Charges - Per Pitch License Sat only	Per Day	25.58	0.00	25.58	28.14	0.00	28.14	10.0	Statutory
Douglas Way Market Permanent Trading Charges - Per Pitch Weekly (inc 10% discount for trading Wednesday, Friday & Saturday)	Per Year	2845.96	0.00	2845.96	3130.56	0.00	3130.56	10.0	Statutory

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

MARKET TRADERS	UNIT	Charges 22/23			Proposed charges 23/24			% Change	Basis for charging
		Basic (£)	VAT (£)	Total (£)	Basic (£)	VAT (£)	Total (£)		
Douglas Way Market Permanent Trading Charges - Per Pitch Weekly (inc 10% discount for trading Wednesday, Friday & Saturday)	Per Month	237.16	0.00	237.16	260.88	0.00	260.88	10.0	Statutory
Douglas Way Market Permanent Trading Charges - Per Pitch Weekly (inc 10% discount for trading Wednesday, Friday & Saturday)	Per Day	54.73	0.00	54.73	60.20	0.00	60.20	10.0	Statutory
Casual Trading Charges Catford Broadway (Mon-Wed)	Per Day	20.50	0.00	20.50	22.55	0.00	22.55	10.0	Statutory

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

MARKET TRADERS	UNIT	Charges 22/23			Proposed charges 23/24			% Change	Basis for charging
		Basic (£)	VAT (£)	Total (£)	Basic (£)	VAT (£)	Total (£)		
Casual Trading Charges Catford Broadway (Thu & Fri)	Per Day	21.00	0.00	21.00	23.10	0.00	23.10	10.0	Statutory
Casual Trading Charges Catford Broadway Sat only	Per Day	20.50	0.00	20.50	22.55	0.00	22.55	10.0	Statutory
Casual Trading Charges Catford Broadway Sun only	Per Day	23.00	0.00	23.00	25.30	0.00	25.30	10.0	Statutory
Casual Trading Charges Deptford High Street/Giffin St/Giffin Sq/Douglas Way (Wed only)	Per Day	27.50	0.00	27.50	30.25	0.00	30.25	10.0	Statutory

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

MARKET TRADERS	UNIT	Charges 22/23			Proposed charges 23/24			% Change	Basis for charging
		Basic (£)	VAT (£)	Total (£)	Basic (£)	VAT (£)	Total (£)		
Casual Trading Charges Deptford High Street/Giffin St/Giffin Sq/Douglas Way (Fri/Mon/Tue/Thu)	Per Day	20.00	0.00	20.00	22.00	0.00	22.00	10.0	Statutory
Casual Trading Charges Deptford High Street/Giffin St/Giffin Sq/Douglas Way (Sat only)	Per Day	31.00	0.00	31.00	34.10	0.00	34.10	10.0	Statutory
Casual Trading Charges Deptford High Street/Giffin St/Giffin Sq/Douglas Way (Sun only)	Per Day	32.00	0.00	32.00	35.20	0.00	35.20	10.0	Statutory
Casual Trading Charges Lewisham High Street	Mon-Sat	27.00	0.00	27.00	29.70	0.00	29.70	10.0	Statutory

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

MARKET TRADERS	UNIT	Charges 22/23			Proposed charges 23/24			% Change	Basis for charging
		Basic (£)	VAT (£)	Total (£)	Basic (£)	VAT (£)	Total (£)		
Casual Trading Charges Lewisham High Street	Weekly	145.00	0.00	145.00	159.50	0.00	159.50	10.0	Statutory
Casual Trading Charges Lewisham High Street	Sunday Only	31.00	0.00	31.00	34.10	0.00	34.10	10.0	Statutory
Casual Trading Charges Lewisham High Street	Odds Weekly	97.00	0.00	97.00	106.70	0.00	106.70	10.0	Statutory
Casual Trading Charges Lewisham High Street	Table & Charges (1+4 any site) per date	6.65	0.00	6.65	7.32	0.00	7.32	10.0	Statutory
Casual Trading Charges Lewisham Focal Area	Demos/FFT Per Day	80.00	0.00	80.00	88.00	0.00	88.00	10.0	Statutory
Casual Trading Charges Lewisham Focal Area	Event Area Per Day	145.00	0.00	145.00	159.50	0.00	159.50	10.0	Statutory
Casual Trading Charges Lewisham Focal Area	6 days - 1 day discount	725.00	0.00	725.00	797.50	0.00	797.50	10.0	Statutory

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

MARKET TRADERS	UNIT	Charges 22/23			Proposed charges 23/24			% Change	Basis for charging
		Basic (£)	VAT (£)	Total (£)	Basic (£)	VAT (£)	Total (£)		
Casual Trading Charges Sydenham	Monthly Saturday Market without stall	23.00	0.00	23.00	25.30	0.00	25.30	10.0	Statutory
Casual Trading Charges Sydenham	Stall Supplied	38.00	0.00	38.00	41.80	0.00	41.80	10.0	Statutory
Casual Trading Charges Miscellaneous Trading Sites i.e. Sydenham, Honor Oak	Weekday - Per Pitch	16.50	0.00	16.50	18.15	0.00	18.15	10.0	Statutory
Casual Trading Charges Miscellaneous Trading Sites i.e. Sydenham, Honor Oak	Saturday - Per Pitch	19.00	0.00	19.00	20.90	0.00	20.90	10.0	Statutory
Casual Trading Charges Miscellaneous Trading Sites i.e. Sydenham, Honor Oak	Sunday - Per Pitch	21.50	0.00	21.50	23.65	0.00	23.65	10.0	Statutory

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

MARKET TRADERS	UNIT	Charges 22/23			Proposed charges 23/24			% Change	Basis for charging
		Basic (£)	VAT (£)	Total (£)	Basic (£)	VAT (£)	Total (£)		
Casual Trading Charges Miscellaneous Trading Sites - Cemeteries Lewisham	Daily	27.00	0.00	27.00	29.70	0.00	29.70	10.0	Statutory
Casual Trading Charges Miscellaneous Trading Sites - Christmas & Other 'One Off' Periodic Street Markets	Up to 14 Pitches (per pitch)	12.50	0.00	12.50	13.75	0.00	13.75	10.0	Statutory
Casual Trading Charges Miscellaneous Trading Sites - Christmas & Other 'One Off' Periodic Street Markets	15 Pitches & Over (per pitch)	18.00	0.00	18.00	19.80	0.00	19.80	10.0	Statutory
Casual Trading Charges Miscellaneous	Licence Fee	15.35	0.00	15.35	16.89	0.00	16.89	10.0	Statutory

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

MARKET TRADERS	UNIT	Charges 22/23			Proposed charges 23/24			% Change	Basis for charging
		Basic (£)	VAT (£)	Total (£)	Basic (£)	VAT (£)	Total (£)		
Casual Trading Charges Miscellaneous	Casual Trader Registration	12.50	0.00	12.50	13.75	0.00	13.75	10.0	Statutory
Casual Trading Charges Miscellaneous	Licence Variation	25.58	0.00	25.58	28.14	0.00	28.14	10.0	Statutory
Casual Trading Charges Miscellaneous	Duplicate Licence	5.63	0.00	5.63	6.19	0.00	6.19	10.0	Statutory
Casual Trading Charges Miscellaneous	Replacement Stall Card	5.63	0.00	5.63	6.19	0.00	6.19	10.0	Statutory
Casual Trading Charges Miscellaneous	Administration Charge/ Proposals to Revoke	115.60	0.00	115.60	127.16	0.00	127.16	10.0	Statutory
Permanent Trading Charges -Catford Broadway Market (Mon/Tue/Wed/Sun)	Per Year	798.20	0.00	798.20	878.02	0.00	878.02	10.0	Statutory

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

MARKET TRADERS	UNIT	Charges 22/23			Proposed charges 23/24			% Change	Basis for charging
		Basic (£)	VAT (£)	Total (£)	Basic (£)	VAT (£)	Total (£)		
Permanent Trading Charges -Catford Broadway Market (Mon/Tue/Wed/Sun)	Per Month	66.52	0.00	66.52	73.17	0.00	73.17	10.0	Statutory
Permanent Trading Charges -Catford Broadway Market (Mon/Tue/Wed/Sun)	Per Day	15.35	0.00	15.35	16.89	0.00	16.89	10.0	Statutory
Permanent Trading Charges -Catford Broadway Market (Thu &Fri)	Per Year	877.76	0.00	877.76	965.54	0.00	965.54	10.0	Statutory
Permanent Trading Charges -Catford Broadway Market (Thu &Fri)	Per Month	73.15	0.00	73.15	80.47	0.00	80.47	10.0	Statutory
Permanent Trading Charges -Catford Broadway Market (Thu &Fri)	Per Day	16.88	0.00	16.88	18.57	0.00	18.57	10.0	Statutory

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

MARKET TRADERS	UNIT	Charges 22/23			Proposed charges 23/24			% Change	Basis for charging
		Basic (£)	VAT (£)	Total (£)	Basic (£)	VAT (£)	Total (£)		
Permanent Trading Charges -Catford Broadway Market (Saturday)	Per Year	771.16	0.00	771.16	848.28	0.00	848.28	10.0	Statutory
Permanent Trading Charges -Catford Broadway Market (Saturday)	Per Month	64.26	0.00	64.26	70.69	0.00	70.69	10.0	Statutory
Permanent Trading Charges -Catford Broadway Market (Saturday)	Per Day	14.83	0.00	14.83	16.31	0.00	16.31	10.0	Statutory
Business Promotion Charges - Lewisham High St	Daily	145.00	0.00	145.00	159.50	0.00	159.50	10.0	Statutory
Business Promotion Charges - Lewisham High St	Weekly (Mon-Sat)	725.00	0.00	725.00	797.50	0.00	797.50	10.0	Statutory
Business Promotion Charges - Deptford High St	Daily	53.70	0.00	53.70	59.07	0.00	59.07	10.0	Statutory

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

MARKET TRADERS	UNIT	Charges 22/23			Proposed charges 23/24			% Change	Basis for charging
		Basic (£)	VAT (£)	Total (£)	Basic (£)	VAT (£)	Total (£)		
Business Promotion Charges - Deptford High St	Weekly (Mon-Sat)	322.20	0.00	322.20	354.42	0.00	354.42	10.0	Statutory
Business Promotion Charges - Catford Broadway	Daily	27.60	0.00	27.60	30.36	0.00	30.36	10.0	Statutory
Business Promotion Charges - Catford Broadway	Weekly (Mon-Sat)	138.00	0.00	138.00	151.80	0.00	151.80	10.0	Statutory
Business Promotion Charges - Sydenham	Daily	53.70	0.00	53.70	59.07	0.00	59.07	10.0	Statutory
Business Promotion Charges - Sydenham	Weekly (Mon-Sat)	322.20	0.00	322.20	354.42	0.00	354.42	10.0	Statutory

Lewisham High Street Market

Permanent Trading Charges

Monday to Saturday

Per Year	£6,330.48
Per Month	£527.54

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

Per Week	£121.54
Per Day	£20.46

Sunday

Per Year	£1,299.96
Per Month	£108.33
Per Day	£25.00

Burtons Yard

Yearly Charge	£1,028.28
Monthly Charge	£85.69
Weekly Charge	£19.77

Daily Vehicle Parking

£1,028.28
£85.69
£19.77

Burtons Yard

Yearly Charge	£939.98
Monthly Charge	£78.33
Weekly Charge	£18.08

Overnight Stall Storage

£939.98
£78.33
£18.08

Lewisham High Street Odds

Permanent Street Trading Charges

Sunday Only (odds)

Per Year	£832.00
Per Month	£69.33
Per Day	£16.00

Seven Day Traders

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

Per Year	£4,576.00
Per Month	£381.33
Per Week	£88.00

Lewisham Sunday Market

Per Year	£1,300.00
Per Month	£108.33
Per Day	£25.00

ALL PRICES INCLUDE CHARGE FOR ELECTRICITY

Deptford High Street Market and Giffin Square

Permanent Trading Charges

Per Pitch Per Day

Wednesday

Per Year	£1,223.56
Per Month	£101.96
Per Day	£23.53

Friday

Per Year	£771.16
Per Month	£64.26
Per Day	£14.83

Saturday

Per Year	£1,330.16
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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

Per Month	£110.85
Per Day	£25.58

Weekly (Including 10% discount for trading Wednesday, Friday & Saturday)

Per Year	£2,952.56
Per Month	£246.05
Per Week	£56.78

Paddy Power/Hamilton Street	
Car Park - Small Storage	£45.44

ALL CHARGES INCLUDE CHARGE FOR ELECTRICITY

Douglas Way Market

Permanent Trading Charges

Per Pitch License

Monday to Wednesday	
Per Year	£1,090.44
Per Month	£90.87
Per Day	£20.97

Thursday and Friday

Per Year	£771.16
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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

Per Month	£64.26
Per Day	£14.83

Saturday

Per Year	£1,330.16
Per Month	£110.85
Per Day	£25.58

Weekly (including 10% discount for trading Wednesday, Friday & Saturday)

Per Year	£2,845.96
Per Month	£237.16
Per Day	£54.73

Hamilton Street/Paddy Power Storage	£45.44
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ALL CHARGES INCLUDE CHARGE FOR ELECTRICITY

Casual Trading Charges & Other Charges

Catford Broadway

Monday/Tuesday/Wednesday	£20.50
Thursday/Friday	£21.00
Saturday	£20.50
Sunday	£23.00

Deptford High Street/Giffin St/Giffin Sq/Douglas Way

Wednesday	£27.50
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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

Friday/Monday/Tuesday/Thursday	£20.00
Saturday	£31.00
Sunday	£32.00

Lewisham High Street

Monday to Saturday	£27.00
Weekly (Monday to Saturday)	£145.00
Sundays Only	£31.00
Odds Weekly	£97.00
Table & Charges (1+4 any site) per date	£6.65

Lewisham Focal Area

Demos/FFT Per Day	£80.00
Event Area Per Day	£145.00
6 days - 1 day discount	£725.00

Casual Trading Charges & Other Charges

Sydenham

Monthly Saturday Market without stall	£23.00
Stall Supplied	£38.00

Miscellaneous Trading Sites i.e Sydenham, Honor Oak

Weekday - Per Pitch	£16.50
Saturday - Per Pitch	£19.00
Sunday - Per Pitch	£21.50
Cemeteries Lewisham Daily Rate per sy	£27.00 £17 error last year

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

Christmas & Other 'One Off' Periodic Street Markets

Up to 14 Pitches (per pitch)	£12.50
15 Pitches & Over (per pitch)	£18.00
Licence Fee	£15.35
Casual Trader Registration	£12.50
Licence Variation	£25.58
Duplicate Licence	£5.63
Replacement Stall Card	£5.63
Administration Charge	
Proposals To Revoke	£115.60

Catford Broadway Market

Permanent Trading Charges

Per Pitch Per day

Monday/Tuesday/Wednesday/Sunday

Per Year	£798.20
Per Month	£66.52
Per Day	£15.35

Thursday and Friday

Per Year	£877.76
Per Month	£73.15
Per Day	£16.88

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

Saturday

Per Year	£771.16
Per Month	£64.26
Per Day	£14.83

10% Discount is given to traders holding 3- or 4-day licences per week

ALL CHARGES INCLUDE CHARGE FOR ELECTRICITY

Business Promotion Charges

From 1st April 2020

Lewisham High Street

Daily	£145.00
Weekly (Mon to Sat)	£725.00 1 Day Discount

Deptford High Street

Daily	£53.70
Weekly (Mon to Sat)	£322.20

Catford Broadway

Daily	£27.60
Weekly (Mon to Sat)	£138.00 1 Day Discount

Sydenham

Daily	£53.70
Weekly (Mon to Sat)	£322.20

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

Traders Permits

Emissions Based Band	Petrol Vehicles				Diesel Vehicles			
	Daily Permit Price	Permit Price (3 months)	Permit Price (6 months)	Permit Price (12 months)	Daily Permit Price	Permit Price (3 months)	Permit Price (6 months))	Permit Price (12 months)
0	£0.17	-	-	£50.00	£0.17	-	-	£50.00
1	£0.50	£38.50	£77.00	£154.00	-	£45.50	£182.00	£364.00
2	£0.98	£77.00	£154.00	£308.00	£1.17	£51.00	£204.00	£408.00
3	£1.13	£88.00	£176.00	£352.00	£1.30	£56.50	£226.00	£452.00
4	£1.27	£99.00	£198.00	£396.00	£1.45	£62.00	£248.00	£496.00
5	£1.41	£110.00	£220.00	£440.00	£1.59	£67.50	£270.00	£540.00
6	£1.55	£121.00	£242.00	£484.00	£1.73	£73.00	£292.00	£584.00
7	£1.70	£132.00	£264.00	£528.00	£1.87	£78.50	£314.00	£628.00
8	£1.83	£143.00	£286.00	£572.00	£2.02	£84.00	£336.00	£672.00
9	£1.98	£154.00	£308.00	£616.00	£2.15	£89.50	£358.00	£716.00
10	£2.11	£165.00	£330.00	£660.00	£2.30	£95.00	£380.00	£760.00
11	£2.26	£176.00	£352.00	£704.00	£2.43	£100.50	£402.00	£804.00
12	£2.40	£187.00	£374.00	£748.00	£2.58	£106.00	£424.00	£848.00
13	£2.54	£198.00	£396.00	£792.00	£2.72	£111.50	£446.00	£892.00

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APPENDIX Y9

Making Fair Financial Decisions



**Making fair financial decisions
Guidance for decision-makers**

3rd edition, January 2015

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

Introduction

With major reductions in public spending, public authorities in Britain are being required to make difficult financial decisions. This guide sets out what is expected of you as a decision-maker or leader of a public authority responsible for delivering key services at a national, regional and/or local level, in order to make such decisions as fair as possible.

The public sector equality duty (the equality duty) does not prevent you from making difficult decisions such as reorganisations and relocations, redundancies, and service reductions, nor does it stop you from making decisions which may affect one group more than another group. The equality duty enables you to demonstrate that you are making financial decisions in a fair, transparent and accountable way, considering the needs and the rights of different members of your community. This is achieved through assessing the impact that changes to policies, procedures and practices could have on people with different protected characteristics.

Assessing the impact on equality of proposed changes to policies, procedures and practices is not just something that the law requires, it is a positive opportunity for you as a public authority leader to ensure you make better decisions based on robust evidence.

What the law requires

Under the equality duty (set out in the Equality Act 2010), public authorities must have 'due regard' to the need to eliminate unlawful discrimination, harassment and victimisation as well as to advance equality of opportunity and foster good relations between people who share a protected characteristic and those who do not.

The protected characteristics covered by the equality duty are: age, disability, gender reassignment, pregnancy and maternity, race, religion or belief, sex and sexual orientation. The duty also covers marriage and civil partnerships, but only in respect of eliminating unlawful discrimination.

The law requires that public authorities demonstrate that they have had 'due regard' to the aims of the equality duty in their decision-making. Assessing the potential impact on equality of proposed changes to policies, procedures and practices is one of the key ways in which public authorities can demonstrate that they have had 'due regard'.

It is also important to note that public authorities subject to the equality duty are also likely to be subject to the Human Rights Act 1998. We would therefore recommend that public authorities consider the potential impact their decisions could have on human rights.

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

Aim of this guide

This guide aims to assist decision-makers in ensuring that:

- The process they follow to assess the impact on equality of financial proposals is robust, and
- The impact that financial proposals could have on people with protected characteristics is thoroughly considered before any decisions are arrived at.

We have also produced detailed guidance for those responsible for assessing the impact on equality of their policies, which is available on our website at www.equalityhumanrights.com

The benefits of assessing the impact on equality

By law, your assessments of impact on equality must:

- Contain enough information to enable a public authority to demonstrate it has had ‘due regard’ to the aims of the equality duty in its decision-making
- Consider ways of mitigating or avoiding any adverse impacts.

Such assessments do not have to take the form of a document called an equality impact assessment. If you choose not to develop a document of this type, then some alternative approach which systematically assesses any adverse impacts of a change in policy, procedure or practice will be required.

Assessing impact on equality is not an end in itself and it should be tailored to, and be proportionate to, the decision that is being made.

Whether it is proportionate for an authority to conduct an assessment of the impact on equality of a financial decision or not depends on its relevance to the authority's particular function and its likely impact on people with protected characteristics.

We recommend that you document your assessment of the impact on equality when developing financial proposals. This will help you to:

- **Ensure you have a written record of the equality considerations** you have taken into account.
- **Ensure that your decision includes a consideration of the actions that would help to avoid or mitigate any impacts on particular protected characteristics.** Individual decisions should also be informed by the wider context of decisions in your own and other relevant public authorities, so that people with particular protected characteristics are not unduly affected by the cumulative effects of different decisions.
- **Make your decisions based on evidence:** a decision which is informed by relevant local and national information about equality is a better quality decision.

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

Assessments of impact on equality provide a clear and systematic way to collect, assess and put forward relevant evidence.

- **Make the decision-making process more transparent:** a process which involves those likely to be affected by the policy, and which is based on evidence, is much more open and transparent. This should also help you secure better public understanding of the difficult decisions you will be making in the coming months.
- **Comply with the law:** a written record can be used to demonstrate that due regard has been had. Failure to meet the equality duty may result in authorities being exposed to costly, time-consuming and reputation-damaging legal challenges.

When should your assessments be carried out?

Assessments of the impact on equality must be carried out at a **formative stage** so that the assessment is an integral part of the development of a proposed policy, not a later justification of a policy that has already been adopted. Financial proposals which are relevant to equality, such as those likely to impact on equality in your workforce and/or for your community, should always be subject to a thorough assessment. This includes proposals to outsource or procure any of the functions of your organisation. The assessment should form part of the proposal, and you should consider it carefully **before** making your decision.

If you are presented with a proposal that has not been assessed for its impact on equality, you should question whether this enables you to consider fully the proposed changes and its likely impact. Decisions not to assess the impact on equality should be fully documented, along with the reasons and the evidence used to come to this conclusion. This is important as authorities may need to rely on this documentation if the decision is challenged.

It is also important to remember that the potential impact is not just about numbers. Evidence of a serious impact on a small number of individuals is just as important as something that will impact on many people.

What should I be looking for in my assessments?

Assessments of impact on equality need to be based on relevant information and enable the decision-maker to understand the equality implications of a decision and any alternative options or proposals.

As with everything, proportionality is a key principle. Assessing the impact on equality of a major financial proposal is likely to need significantly more effort and resources dedicated to ensuring effective engagement, than a simple assessment of a proposal to save money by changing staff travel arrangements.

There is no prescribed format for assessing the impact on equality, but the following questions and answers provide guidance to assist you in determining whether you consider that an assessment is robust enough to rely on:

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APPENDICES W1 to Z4 2023/24 BUDGET REPORT

- **Is the purpose of the financial proposal clearly set out?**

A robust assessment will set out the reasons for the change; how this change can impact on protected groups, as well as whom it is intended to benefit; and the intended outcome. You should also think about how individual financial proposals might relate to one another. This is because a series of changes to different policies or services could have a severe impact on particular protected characteristics.

Joint working with your public authority partners will also help you to consider thoroughly the impact of your joint decisions on the people you collectively serve.

Example: A local authority takes separate decisions to limit the eligibility criteria for community care services; increase charges for respite services; scale back its accessible housing programme; and cut concessionary travel. Each separate decision may have a significant effect on the lives of disabled residents, and the cumulative impact of these decisions may be considerable. This combined impact would not be apparent if the decisions were considered in isolation.

- **Has the assessment considered available evidence?**

Public authorities should consider the information and research already available locally and nationally. The assessment of impact on equality should be underpinned by up-to-date and reliable information about the different protected groups that the proposal is likely to have an impact on. A lack of information is not a sufficient reason to conclude that there is no impact.

- **Have those likely to be affected by the proposal been engaged?**

Engagement is crucial to assessing the impact on equality. There is no explicit requirement to engage people under the equality duty, but it will help you to improve the equality information that you use to understand the possible impact on your policy on different protected characteristics. No-one can give you a better insight into how proposed changes will have an impact on, for example, disabled people, than disabled people themselves.

- **Have potential positive and negative impacts been identified?**

It is not enough to state simply that a policy will impact on everyone equally; there should be a more in-depth consideration of available evidence to see if particular protected characteristics are more likely to be affected than others. Equal treatment does not always produce equal outcomes; sometimes authorities will have to take particular steps for certain groups to address an existing disadvantage or to meet differing needs.

- **What course of action does the assessment suggest that I take? Is it justifiable?**

The assessment should clearly identify the option(s) chosen, and their potential impacts, and document the reasons for this decision. There are four possible outcomes of an assessment of the impact on equality, and more than one may apply to a single proposal:

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Outcome 1: No major change required when the assessment has not identified any potential for discrimination or adverse impact and all opportunities to advance equality have been taken.

Outcome 2: Adjustments to remove barriers identified by the assessment or to better advance equality. Are you satisfied that the proposed adjustments will remove the barriers identified?

Outcome 3: Continue despite having identified some potential for adverse impacts or missed opportunities to advance equality. In this case, the justification should be included in the assessment and should be in line with the duty to have 'due regard'. For the most important relevant policies, compelling reasons will be needed. You should consider whether there are sufficient plans to reduce the negative impact and/or plans to monitor the actual impact, as discussed below.

Outcome 4: Stop and rethink when an assessment shows actual or potential unlawful discrimination.

- Are there plans to alleviate any negative impacts?**

Where the assessment indicates a potential negative impact, consideration should be given to means of reducing or mitigating this impact. This will in practice be supported by the development of an action plan to reduce impacts. This should identify the responsibility for delivering each action and the associated timescales for implementation. Considering what action you could take to avoid any negative impact is crucial, to reduce the likelihood that the difficult decisions you will have to take in the near future do not create or perpetuate inequality.

Example: A University decides to close down its childcare facility to save money, particularly given that it is currently being under-used. It identifies that doing so will have a negative impact on women and individuals from different racial groups, both staff and students.

In order to mitigate such impacts, the University designs an action plan to ensure relevant information on childcare facilities in the area is disseminated to staff and students in a timely manner. This will help to improve partnership working with the local authority and to ensure that sufficient and affordable childcare remains accessible to its students and staff.

- Are there plans to monitor the actual impact of the proposal?**

Although assessments of impact on equality will help to anticipate a proposal's likely effect on different communities and groups, in reality the full impact of a decision will only be known once it is introduced. It is therefore important to set out arrangements for reviewing the actual impact of the proposals once they have been implemented.

What happens if you don't properly assess the impact on equality of relevant decisions?

APPENDICES W1 to Z4 2023/24 BUDGET REPORT

If you have not carried out an assessment of impact on equality of the proposal, or have not done so thoroughly, you risk leaving yourself open to legal challenges, which are both costly and time-consuming. Legal cases have shown what can happen when authorities do not consider their equality duties when making decisions.

Example: A court overturned a decision by Haringey Council to consent to a large-scale building redevelopment in Wards Corner in Tottenham, on the basis that the council had not considered the impact of the proposal on different racial groups before granting planning permission.

However, the result can often be far more fundamental than a legal challenge. If people feel that an authority is acting high-handedly or without properly involving its service users or employees, or listening to their concerns, they are likely to become disillusioned with you.

Above all, authorities which fail to carry out robust assessments of the impact on equality risk making poor and unfair decisions that could discriminate against people with particular protected characteristics and perpetuate or worsen inequality.

As part of its regulatory role to ensure compliance with the equality duty, the Commission monitors financial decisions with a view to ensuring that these are taken in compliance with the equality duty and have taken into account the need to mitigate negative impacts, where possible.

APPENDIX Z1: Interest Rate Forecasts 2022 - 2025

The Council has appointed Link Group as its treasury advisors and part of their service is to assist the Council to formulate a view on interest rates. The PWLB rate forecast below is based on the Certainty Rate (the standard rate minus 20 bps) which has been accessible to most authorities since 1st November 2012.

The latest forecast, made on 19th December, sets out a view that both short and long-dated interest rates will be elevated for some little while, as the Bank of England seeks to squeeze inflation out of the economy, whilst the government is also providing a limited package of fiscal loosening to try and protect households and businesses from the ravages of ultra-high wholesale gas and electricity prices.

PWLB rates reflect a less elevated yield curve than prevailed under the Truss/Kwarteng government, and the 17th of November Autumn Statement made clear the government's priority is the establishment and maintenance of fiscal rectitude. In addition, the MPC has tightened short-term interest rates with a view to trying to slow the economy sufficiently to keep the secondary effects of inflation – as measured by wage rises – under control.

The current PWLB rate forecasts below are based on the Certainty Rate.

Period	Bank Rate	PWLB Borrowing Rates % (including certainty rate adjustment of 20 basis points)				
		%	5 year	10 year	25 year	50 year
Dec 2022	3.50	4.20	4.30	4.60	4.30	
Mar 2023	4.25	4.20	4.40	4.60	4.30	
Jun 2023	4.50	4.20	4.40	4.60	4.30	
Sep 2023	4.50	4.10	4.30	4.50	4.20	
Dec 2023	4.50	4.00	4.10	4.40	4.10	
Mar 2024	4.00	3.90	3.90	4.20	3.90	
Jun 2024	3.75	3.80	3.80	4.10	3.80	
Sep 2024	3.50	3.60	3.60	4.00	3.70	
Dec 2024	3.25	3.50	3.50	3.90	3.60	
Mar 2025	3.00	3.40	3.40	3.70	3.50	
Jun 2025	2.75	3.30	3.30	3.60	3.30	
Sep 2025	2.50	3.20	3.20	3.50	3.20	
Dec 2025	2.50	3.10	3.10	3.50	3.20	

A SUMMARY OVERVIEW OF THE FUTURE PATH OF BANK RATE

- Our central forecast for interest rates was most recently updated on 19th December and reflected a view that the MPC would be keen to further demonstrate its anti-inflation credentials by delivering a succession of rate increases. This has happened but the Government's policy of emphasising fiscal rectitude will probably mean Bank Rate will not need to increase to further than 4.5%.
- Further down the road, we anticipate the Bank of England will be keen to loosen monetary policy when the worst of the inflationary pressures are behind us – but that timing will be one of fine judgment: cut too soon, and inflationary pressures may well build up further; cut too late and any downturn or recession may be prolonged.
- The CPI measure of inflation looks to have peaked at 11.1% in Q4 2022 (currently 10.7%). Despite the cost-of-living squeeze that is still taking shape, the Bank will want

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to see evidence that wages are not spiralling upwards in what is evidently a very tight labour market.

- Regarding the plan to sell £10bn of gilts back into the market each quarter (Quantitative Tightening), this has started and will focus on the short, medium and longer end of the curve in equal measure now that the short-lived effects of the Truss/Kwarteng unfunded dash for growth policy are firmly in the rear-view mirror.
- In the upcoming months, our forecasts will be guided not only by economic data releases and clarifications from the MPC over its monetary policies and the Government over its fiscal policies, but the on-going conflict between Russia and Ukraine. (More recently, the heightened tensions between China/Taiwan/US also have the potential to have a wider and negative economic impact.)
- On the positive side, consumers are still estimated to be sitting on over £160bn of excess savings left over from the pandemic so that will cushion some of the impact of the above challenges. However, most of those are held by more affluent people whereas lower income families already spend nearly all their income on essentials such as food, energy and rent/mortgage payments.

PWLB Rates

- The yield curve movements have become less volatile of late and PWLB 5 to 50 years Certainty Rates are, generally, in the range of 4.10% to 4.80%.
- We view the markets as having built in, already, nearly all the effects on gilt yields of the likely increases in Bank Rate and the elevated inflation outlook.

The balance of risks to the UK economy: -

- The overall balance of risks to economic growth in the UK is to the downside.

Downside risks to current forecasts for UK gilt yields and PWLB rates include: -

- **Labour and supply shortages** prove more enduring and disruptive and depress economic activity (accepting that in the near-term this is also an upside risk to inflation and, thus, rising gilt yields).
- **The Bank of England** acts too quickly, or too far, over the next year to raise Bank Rate and causes UK economic growth, and increases in inflation, to be weaker than we currently anticipate.
- **UK / EU trade arrangements** – if there was a major impact on trade flows and financial services due to complications or lack of co-operation in sorting out significant remaining issues.
- **Geopolitical risks**, for example in Ukraine/Russia, China/Taiwan/US, Iran, North Korea and Middle Eastern countries, which could lead to increasing safe-haven flows.

Upside risks to current forecasts for UK gilt yields and PWLB rates: -

- **The Bank of England is too slow** in its pace and strength of increases in Bank Rate and, therefore, allows inflationary pressures to build up too strongly and for a longer period within the UK economy, which then necessitates Bank Rate staying higher for longer than we currently project or even necessitates a further series of increases in Bank Rate.
- **The Government** acts too quickly to cut taxes and/or increases expenditure in light of the cost-of-living squeeze.
- **The pound weakens** because of a lack of confidence in the UK Government's fiscal policies, resulting in investors pricing in a risk premium for holding UK sovereign debt.

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- Longer term **US treasury yields** rise strongly and pull gilt yields up higher than currently forecast.
- Projected **gilt issuance, inclusive of natural maturities and QT**, could be too much for the markets to comfortably digest without higher yields consequently.

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APPENDIX Z2: Credit Worthiness Policy - (Linked to Treasury Management Practice (TMP1) – Credit and Counterparty Risk Management)

Annual Investment Strategy:

The key requirements of both the CIPFA Code of Practice on Treasury Management in the Public Services and Department for Levelling Up, Housing and Communities (DLUHC's) Investment Guidance are to set an annual investment strategy, as part of its annual Treasury Management Strategy for the following year, covering the identification and approval of the following:

- The strategy guidelines for choosing and placing investments, particularly non-specified investments;
- The principles to be used to determine the maximum periods for which funds can be committed;
- Specified investments that the Council will use. These are high security (i.e. high credit rating, although this is defined by the Council, and no guidelines are given), and high liquidity investments in sterling and with a maturity of no more than a year; and
- Non-specified investments, clarifying the greater risk implications, identifying the general types of investment that may be used and a limit to the overall amount of various categories that can be held at any time.

The investment policy proposed for the Council is:

Strategy guidelines – The main strategy guidelines are contained in the body of the treasury strategy statement.

Specified investments: These investments are sterling investments of not more than one-year maturity, or those which could be for a longer period but where the Council has the right to be repaid within 12 months if it wishes. They also include investments which were originally classed as being non-specified investments, but which would have been classified as specified investments apart from originally being for a period longer than 12 months, once the remaining period to maturity falls to under twelve months. These are considered low risk assets where the possibility of loss of principal or investment income is small. These would include sterling investments which would not be defined as capital expenditure with:

1. The UK Government, such as the Debt Management Account Deposit Facility (DMADF), UK Treasury bills or a gilt with less than one year to maturity;
2. Supranational bonds of less than one year's duration;
3. A local authority, housing association, parish council or community council;
4. Pooled investment vehicles (such as money market funds) that have been awarded a high credit rating (AAA) by a credit rating agency; and
5. A body that is considered of a high credit quality (such as a bank or building society).

Within these bodies, and in accordance with the Code, the Council has set additional criteria to define the time and amount of monies which will be invested in these bodies, as shown in the table further below.

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Non-Specified Investments: These are any investments which do not meet the specified investment criteria, and include certificates of deposit issued by banks or building societies, fixed deposits with building societies that do not meet the basic security requirements of specified investments, corporate bonds, and property funds. Provision has been made in the Strategy to invest in a limited number of lower rated building societies within the restrictions set out, certificates of deposit with both banks and building societies, and pooled asset funds (should the relevant opportunity arise). The Council will seek guidance on the status of any pooled fund or collective investment scheme it may consider using, and appropriate due diligence will also be undertaken before investment of this type is undertaken.

The Council applies the creditworthiness service provided by Link Group. This service employs a sophisticated modelling approach utilising credit ratings from the three main credit rating agencies - Fitch, Moody's and Standard and Poor's. The credit ratings of counterparties are supplemented with the following overlays:

- Credit watches and credit outlooks from credit rating agencies;
- Credit Default Swap (CDS) spreads to give early warning of likely changes in credit ratings;
- Sovereign ratings to select counterparties from only the most creditworthy countries.

These factors are weighted and combined with an overlay of CDS spreads. The end product is a series of ratings (colour coded) to indicate the relative creditworthiness of counterparties. These ratings are used by the Council to determine the suggested duration for investments.

The Link Group creditworthiness service uses a wider array of information other than just primary ratings. Furthermore, by using a risk weighted scoring system, it does not give undue precedence to just one agency's ratings.

The criteria, time limits and monetary limits applying to institutions or investment vehicles are:

	Minimum credit criteria / colour band	Max % of total investments/ £ limit per institution	Max. maturity period
DMADF – UK Government	N/A	100%	6 months
UK Government gilts	UK sovereign rating	£20m	1 year
UK Government Treasury bills	UK sovereign rating	£60m	6 months
Money Market Funds - CNAV	AAA	£30m	Liquid
Money Market Funds - LVNAV	AAA	£30m	Liquid
Money Market Funds - VNAV	AAA	£30m	Liquid
Local authorities	N/A	£25m	1 year

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Term deposits with banks and building societies	Yellow* Purple Blue Orange Red Green No Colour	£30m £25m £40m £25m £20m £15m Not for use**	Up to 5 years Up to 2 years Up to 1 year Up to 1 year Up to 6 Months Up to 100 days Not for use**
CDs or corporate bonds with banks and building societies	Blue Orange Red Green No Colour	£40m £25m £20m £15m Not for use**	Up to 1 year Up to 1 year Up to 6 Months Up to 100 days Not for use**
Term deposits or CDs with building societies on Link's counterparty list rated 'No colour'	BBB-	£10m	Up to 3 months
Call accounts and notice accounts	Yellow* Purple Blue Orange Red Green No Colour	£30m £25m £40m £25m £20m £15m Not for use	Liquid
Pooled investment funds		£50m	At least 5 years

*for UK Government debt, or its equivalent, Constant Net Asset Value (CNAV) money market funds and collateralised deposits where the collateral is UK Government debt.

**except for those building societies rated BBB- or higher as set out elsewhere in the table.

The monitoring of investment counterparties: The credit rating of counterparties will be monitored regularly, on at least a weekly basis. The Council receives credit rating information (changes, rating watches and rating outlooks) from Link Group as and when ratings change, and the impact of those changes are assessed promptly. On occasion ratings may be downgraded when an investment has already been made. The criteria used are such that a minor downgrading should not affect the full receipt of the principal and interest upon maturity. Any counterparty failing to meet the criteria will be removed from the lending list immediately, and if required new counterparties which meet the criteria will be added to the list. Any fixed term investment held at the time of the downgrade will be left to mature as such investments cannot be broken mid-term.

Sole reliance will not be placed on the use of this external service. In addition, the Council will make use of market data and information on any external support for banks to help support its decision-making process.

Accounting treatment of investments: The accounting treatment may differ from the underlying cash transactions arising from investment decisions made by this Council. To ensure that the Council is protected from any adverse revenue impact which may arise from

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these differences, we will review the accounting implications of new transactions before they are undertaken.

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APPENDIX Z3: Approved Countries for Investment

This list is based on those countries which have sovereign ratings of AA- or higher, (we show the lowest rating from Fitch, Moody's and S&P) and also, (except - at the time of writing - for Hong Kong, Norway and Luxembourg), have banks operating in sterling markets which have credit ratings of green or above in the Link credit worthiness service.

AAA

- Australia
- Denmark
- Germany
- Luxembourg
- Netherlands
- Norway
- Singapore
- Sweden
- Switzerland

AA+

- Canada
- Finland
- USA

AA

- Abu Dhabi (UAE)
- France

AA-

- Belgium
- Hong Kong
- Qatar
- U.K.

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APPENDIX Z4: Requirement of the CIPFA Treasury Management Code of Practice
Treasury Management Scheme of Delegation

(i) Full Council

- budget consideration and approval;
- approval of annual Treasury Management Strategy;
- approval of/amendments to the organisation's adopted clauses and treasury management policy statement.

(ii) Public Accounts Committee

- receiving and reviewing reports on treasury management policies, practices and activities.

The Treasury Management Role of the Section 151 Officer

The S151 (responsible) officer has responsibility for:

- recommending treasury management policies for approval, reviewing the same regularly, and monitoring compliance;
- submitting regular treasury management policy reports;
- submitting budgets and budget variations;
- receiving and reviewing management information reports;
- reviewing the performance of the treasury management function;
- ensuring the adequacy of treasury management resources and skills, and the effective division of responsibilities within the treasury management function;
- ensuring the adequacy of internal audit, and liaising with external audit;
- approval of the division of responsibilities;
- approving the organisation's treasury management practices;
- preparation of a capital strategy to include capital expenditure, capital financing, non-financial investments and treasury management, with a long-term timeframe;
- ensuring that the capital strategy is prudent, sustainable, affordable and prudent in the long term and provides value for money;
- ensuring that due diligence has been carried out on all treasury and non-financial investments and is in accordance with the risk appetite of the authority;
- ensuring that the authority has appropriate legal powers to undertake expenditure on non-financial assets and their financing;
- ensuring the proportionality of all investments so that the authority does not undertake a level of investing which exposes the authority to an excessive level of risk compared to its financial resources;
- ensuring that an adequate governance process is in place for the approval, monitoring and ongoing risk management of all non-financial investments and long term liabilities;
- provision to Members of a schedule of all non-treasury investments including material investments in subsidiaries, joint ventures, loans and financial guarantees;
- ensuring that Members are adequately informed and understand the risk exposures taken on by an authority; and

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- ensuring that the authority has adequate expertise, either in-house or externally, to carry out the above.

Appendix Z7: Requirements for the revised CIPFA Treasury Management Code and Prudential Code

2021 revised CIPFA Treasury Management Code and Prudential Code – changes which will impact on future TMSS/AIS reports and the risk management framework

CIPFA published the revised Codes on 20th December 2021 and has stated that revisions need to be included in the reporting framework from the 2023/24 financial year. The Council, therefore, has to have regard to these Codes of Practice when it prepares the Treasury Management Strategy Statement (TMSS) and Annual Investment Strategy (AIS), and also related reports during the financial year, which are taken to Full Council for approval.

The revised Treasury Management Code requires all investments and investment income to be attributed to one of the following three purposes: -

Treasury management

Arising from the organisation's cash flows or treasury risk management activity, this type of investment represents balances which are only held until the cash is required for use. Treasury investments may also arise from other treasury risk management activity which seeks to prudently manage the risks, costs or income relating to existing or forecast debt or treasury investments.

Service delivery

Investments held primarily and directly for the delivery of public services including housing, regeneration and local infrastructure. Returns on this category of investment which are funded by borrowing are permitted only in cases where the income is "either related to the financial viability of the project in question or otherwise incidental to the primary purpose".

Commercial return

Investments held primarily for financial return with no treasury management or direct service provision purpose. Risks on such investments should be proportionate to an authority's financial capacity – i.e., that 'plausible losses' could be absorbed in budgets or reserves without unmanageable detriment to local services. An authority must not borrow to invest primarily for financial return.

The revised Treasury Management Code will require an authority to implement the following:

1. Adopt a new liability benchmark treasury indicator to support the financing risk management of the capital financing requirement; this is to be shown in chart form for a minimum of ten years, with material differences between the liability benchmark and actual loans to be explained;
2. Long-term treasury investments, (including pooled funds), are to be classed as commercial investments unless justified by a cash flow business case;

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3. Pooled funds are to be included in the indicator for principal sums maturing in years beyond the initial budget year;
4. Amendment to the knowledge and skills register for officers and members involved in the treasury management function - to be proportionate to the size and complexity of the treasury management conducted by each authority;
5. Reporting to members is to be done quarterly. Specifically, the Chief Finance Officer (CFO) is required to establish procedures to monitor and report performance against all forward-looking prudential indicators at least quarterly. The CFO is expected to establish a measurement and reporting process that highlights significant actual or forecast deviations from the approved indicators. However, monitoring of prudential indicators, including forecast debt and investments, is not required to be taken to Full Council and should be reported as part of the authority's integrated revenue, capital and balance sheet monitoring;
6. Environmental, social and governance (ESG) issues to be addressed within an authority's treasury management policies and practices (TMP1).
7. Training: The CIPFA Treasury Management Code requires the responsible officer to ensure that members with responsibility for treasury management receive adequate training in treasury management. This especially applies to members responsible for scrutiny.

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Public Accounts Select Committee

Select Committee Work Programme Report

Date: 02 February 2023

Key decision: No.

Class: Part 1 (not restricted)

Wards affected: Not applicable

Contributor: Timothy Andrew (Scrutiny Manager)

Outline and recommendations

This report gives Committee members an opportunity to review the Committee's work programme and make any necessary changes.

The Committee is asked to:

- Review the work programme attached at Appendix B.
- Consider the items for the next meeting and specify the information required.
- Look at the forward plan of key decisions at Appendix E to consider whether there are any items that should be considered for further scrutiny.

Timeline of decision-making

30 June 2022 - Draft Public Accounts Select Committee work programme 2022/23 agreed by Committee

19 July 2022 - Work programme 2022/23 – agreed by Business Panel

1. Summary

- 1.1. The Committee proposed a draft work programme at the beginning of the municipal year. This was considered alongside the draft work programmes of the other select committees and agreed by Business Panel on 19 July 2022.
- 1.2. The work programme should be reviewed at each meeting to take account of changing priorities.

2. Recommendations

- 2.1. The Committee is asked to:
- Review the work programme attached at Appendix B.
 - Consider the items for the next meeting and specify what evidence is required, including being clear about the information the committee wishes to be included in officer reports.
 - Look at the forward plan of key decisions at Appendix E to consider whether there are any items for further scrutiny.

3. Work programming

- 3.1. When reviewing the work programme the Committee should consider the following:
- The Committee's terms of reference
- 3.2. The Committee's areas of responsibility, include, but are not limited to:
- Reviewing the way Council managers makes decisions about spending money
 - Challenging the Council to use the most effective means of managing its resources
 - Examining and challenging the Council's plans for setting its annual budget
 - Recommending ways to improve the Council's processes for buying goods and services (and for managing services to get the best value)
- Whether any urgent issues have arisen that require scrutiny
- 3.3. If the Committee becomes aware of an issue requiring further scrutiny, it should consider the prioritisation process (Appendix C) and the Effective Scrutiny Guidelines (Appendix D) before deciding on its priority.
- Whether a meeting is the most effective means for scrutinising the issue
- 3.4. Committee members should consider whether there are alternative methods for gathering information or receiving updates on issues of interest. For example, would a briefing, written summary or review of exiting material be more appropriate and effective?
- Whether there is space in the Committee's work plan to consider the item
- 3.5. Members should consider which work programme items could be removed or rescheduled to make space for the full consideration of more important issues.
- Whether the item links to the priorities set out in the corporate strategy
- 3.7. A new corporate strategy has been developed¹ – which explains the Council's values, priorities and focus for the next four years (2022-2026):
- Cleaner and Greener
 - Strong Local Economy
 - Quality Housing
 - Children and Young People
 - Safer Communities
 - Open Lewisham
 - Health and Wellbeing

¹ [Corporate Strategy for 2022-2026](#)

- 3.6. The Committee should consider how the scrutiny of items on its work programme adds to the effective delivery of the strategy.

4. The next meeting

- 4.1. The following items are scheduled for the next meeting. For each item, the Committee should clearly define the information and analysis it wishes to see in officer reports. If the Committee has designated one of its members as a climate change champion, that member should work with the Chair to ensure that officers are given appropriate steer in relation to the reports, to ensure they include relevant climate change considerations.
- 4.2. The Committee should also consider whether to invite any expert witnesses to provide evidence, and whether site visits or engagement would assist the effective scrutiny of the item.

Agenda Item	Review type
Income generation and commercialisation	Performance monitoring
To be decided	Standard item

5. Referrals

- 5.1. This is a list of referrals made by the Committee this municipal year:

Referral title	Date of referral	Date considered by Mayor and Cabinet	Response due at Committee
Budget reductions report	01-12-22	07-12-22	*10-01-23 ²

6. Financial implications

- 6.1. There are no direct financial implications arising from the implementation of the recommendations in this report. Items on the Committee's work programme will have financial implications and these will need to be considered as part of the reports on those items.

7. Legal implications

- 7.1. In accordance with the Council's Constitution, all scrutiny select committees must devise and submit a work programme to the Business Panel at the start of each municipal year.

² A response to the Committee's comments was provided for Mayor and Cabinet in advance of the decision on 7 December. It can be viewed online here: [link to the officer response to comments on the budget reductions report](#)

8. Equalities implications

- 8.1. Equality Act 2010 brought together all previous equality legislation in England, Scotland and Wales. The Act included a new public sector equality duty, replacing the separate duties relating to race, disability and gender equality. The duty came into force on 6 April 2011. It 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.
- 8.2. 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.
- 8.3. There may be equalities implications arising from items on the work programme and all activities undertaken by the Select Committee will need to give due consideration to this.

9. Climate change and environmental implications

- 9.1. There are no direct climate change or environmental implications arising from the implementation of the recommendations in this report. However, in February 2019 Lewisham Council declared a Climate Emergency and proposed a target to make the borough carbon neutral by 2030. An action plan to achieve this target was subsequently agreed by Mayor and Cabinet (following pre-decision scrutiny by the Sustainable Development Select Committee)³. The plan incorporates all areas of the Council's work. Items on the work programme may well have climate change and environmental implications and reports considered by the Committee should acknowledge this.

10. Crime and disorder implications

- 10.1. There are no direct crime and disorder implications arising from the implementation of the recommendations in this report. Items on the Committee's work programme may have crime and disorder implications and these will need to be considered as part of the reports on those items.

11. Health and wellbeing implications

- 11.1. There are no direct health and wellbeing implications arising from the implementation of the recommendations in this report. Items on the Committee's work programme may have health and wellbeing implications and these will need to be considered as part of the reports on those items.

12. Report author and contact

If you have any questions about this report please contact: Timothy Andrew (Scrutiny Manager) 020 8314 7916 timothy.andrew@lewisham.gov.uk

³ See <https://lewisham.gov.uk/TacklingTheClimateEmergency> for a summary of the Council's work in this area.

Appendix A

Public Accounts Select Committee Terms of Reference

The following roles are common to all select committees:

(a) General functions

- To review and scrutinise decisions made and actions taken in relation to executive and non-executive functions
- To make reports and recommendations to the Council or the executive, arising out of such review and scrutiny in relation to any executive or non-executive function
- To make reports or recommendations to the Council and/or Executive in relation to matters affecting the area or its residents
- The right to require the attendance of members and officers to answer questions includes a right to require a member to attend to answer questions on up and coming decisions

(b) Policy development

- To assist the executive in matters of policy development by in depth analysis of strategic policy issues facing the Council for report and/or recommendation to the Executive or Council or committee as appropriate
- To conduct research, community and/or other consultation in the analysis of policy options available to the Council
- To liaise with other public organisations operating in the borough – both national, regional and local, to ensure that the interests of local people are enhanced by collaborative working in policy development wherever possible

(c) Scrutiny

- To scrutinise the decisions made by and the performance of the Executive and other committees and Council officers both in relation to individual decisions made and over time
- To scrutinise previous performance of the Council in relation to its policy objectives/performance targets and/or particular service areas
- To question members of the Executive or appropriate committees and executive directors personally about decisions
- To question members of the Executive or appropriate committees and executive directors in relation to previous performance whether generally in comparison with service plans and targets over time or in relation to particular initiatives which have been implemented
- To scrutinise the performance of other public bodies in the borough and to invite them to make reports to and/or address the select committee/Business Panel and local people about their activities and performance
- To question and gather evidence from any person outside the Council (with their consent)
- To make recommendations to the Executive or appropriate committee and/or Council arising from the outcome of the scrutiny process

(d) Community representation

- To promote and put into effect closer links between overview and scrutiny members and the local community
- To encourage and stimulate an enhanced community representative role for overview and scrutiny members including enhanced methods of consultation with local people
- To liaise with the Council's ward assemblies so that the local community might participate in the democratic process and where it considers it appropriate to seek the views of the ward assemblies on matters that affect or are likely to affect the local areas, including accepting items for the agenda of the appropriate select committee from ward assemblies.

- To keep the Council's local ward assemblies under review and to make recommendations to the Executive and/or Council as to how participation in the democratic process by local people can be enhanced
- To receive petitions, deputations and representations from local people and other stakeholders about areas of concern within their overview and scrutiny remit, to refer them to the Executive, appropriate committee or officer for action, with a recommendation or report if the committee considers that necessary
- To consider any referral within their remit referred to it by a member under the Councillor Call for Action, and if they consider it appropriate to scrutinise decisions and/or actions taken in relation to that matter, and/or make recommendations/report to the Executive (for executive matters) or the Council (non-executive matters).

(e) Finance

- To exercise overall responsibility for finances made available to it for use in the performance of its overview and scrutiny function.

(f) Work programme

- As far as possible to draw up a draft annual work programme in each municipal year for consideration by the overview and scrutiny Business Panel. Once approved by the Business Panel, the relevant select committee will implement the programme during that municipal year. Nothing in this arrangement inhibits the right of every member of a select committee (or the Business Panel) to place an item on the agenda of that select committee (or Business Panel respectively) for discussion.
- The Council and the Executive will also be able to request that the overview and scrutiny select committee research and/or report on matters of concern and the select committee will consider whether the work can be carried out as requested. If it can be accommodated, the select committee will perform it. If the committee has reservations about performing the requested work, it will refer the matter to the Business Panel for decision.

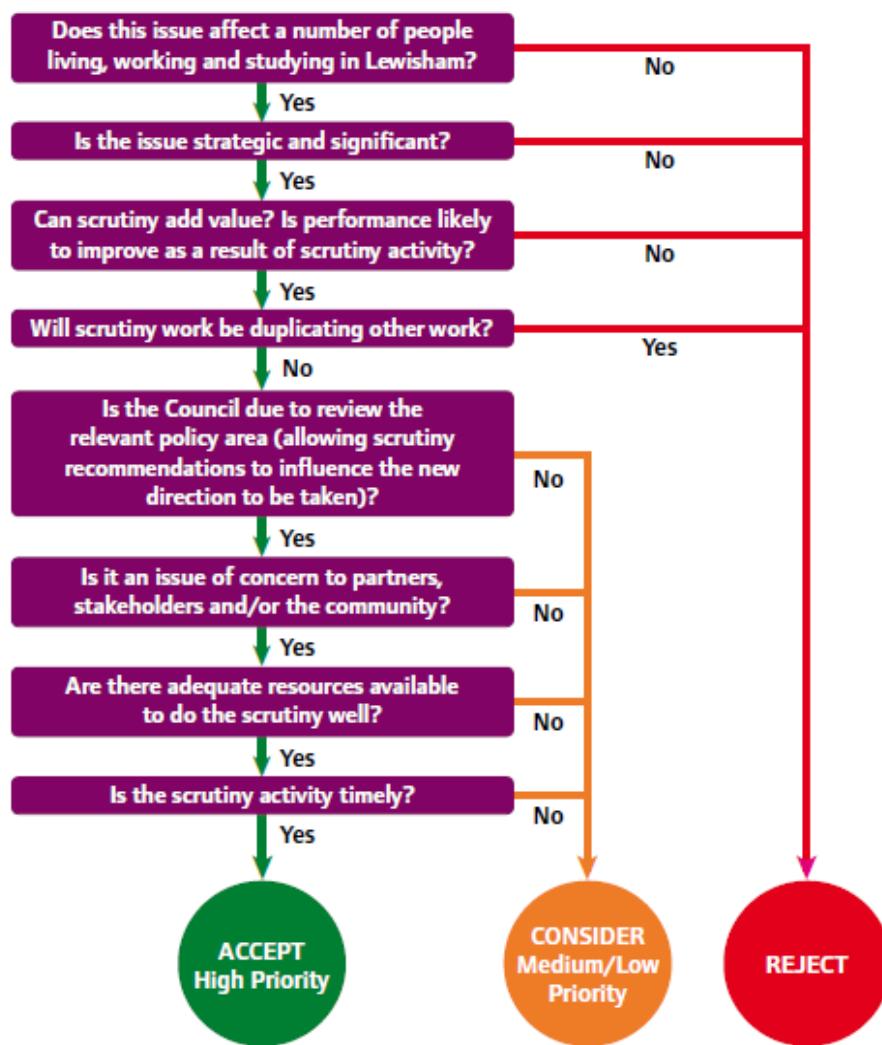
In addition to the general terms of reference outlined above, the Public Accounts Select Committee has the following specific terms of reference - to exercise all the functions and roles of the overview and scrutiny committee in relation to the following matters:

- To make reports and recommendations to the Council or the Executive which promote the better custodianship of the Council's finances and to make recommendations for best financial practice across the authority.
- To investigate the possibilities for improving the Council's financial management practice and to make reports and recommendations to Executive or Council as appropriate.
- To encourage the highest standards of financial custodianship where necessary overseeing training activity for all members in this area.
- To consult on and to comment on and make recommendations to the Executive in respect of the actual and proposed contents of the Council's budget and without limiting the general remit of the committee, to hold the Executive to account for its performance in respect of all budgetary matters.
- To receive reports as appropriate from the Audit Panel in respect of their overview of contract procedure rules and financial regulations.
- To make recommendations and reports for consideration by the Executive or Council to improve procurement practice.
- To scrutinise the effectiveness of the Audit Panel.

Appendix C

The flowchart below is designed to help Members decide which items should be added to the work programme. It is important to focus on areas where the Committee will influence decision-making.

Scrutiny work programme – prioritisation process



Appendix D

Effective Scrutiny Guidelines

At Lewisham we:

1. Prioritise

It is more effective to look at a small number of key issues in an in-depth way, than skim the surface of everything falling within scrutiny's remit. We try to focus on issues of concern to the community and/or matters that are linked to our corporate priorities. We only add items to the work programme if we are certain our consideration of the matter will make a real and tangible difference.

2. Are independent

Scrutiny is led by Scrutiny Members. Scrutiny Members are in charge of the work programme and, for every item, we specify what evidence we require and what information we would like to see in any officer reports that are prepared. We are not whipped by our political party or unduly influenced by the Cabinet or senior officers.

3. Work collectively

If we collectively agree in advance what we want to achieve in relation to each item under consideration, including what the key lines of enquiry should be, we can work as a team to question witnesses and ensure that all the required evidence is gathered. Scrutiny is impartial and the scrutiny process should be free from political point scoring and not used to further party political objectives.

4. Engage

Involving residents helps scrutiny access a wider range of ideas and knowledge, listen to a broader range of voices and better understand the opinions of residents and service users. Engagement helps ensure that recommendations result in residents' wants and needs being more effectively met.

5. Make SMART evidence-based recommendations

We make recommendations that are based on solid, triangulated evidence – where a variety of sources of evidence point to a change in practice that will positively alter outcomes. We recognise that recommendations are more powerful if they are:

- Specific (simple, sensible, significant).
- Measurable (meaningful, motivating).
- Achievable (agreed, attainable).
- Relevant (reasonable, realistic and resourced, results-based).
- Time bound (time-based, time limited, time/cost limited, timely, time-sensitive).

Public Accounts Select Committee work plan 2022-23

Item	Type of item	Priority	30-Jun-22	22-Sep-22	01-Dec-22	02-Feb-23	16-Mar-23
Medium term financial strategy	Standard item	All					
Financial monitoring	Performance monitoring	All	(period 2)	(period 4)	(period 7)		
Financial results 2021-22	Performance monitoring	All					
Budget pressures and management action	Performance monitoring	All					
Treasury management	Performance monitoring	All				2023-24 strategy	
Budget cuts	Performance monitoring	All					
Council budget 2023-24	Policy development	All					
To be decided		All					
Income generation and commercialisation	Performance monitoring	All					

Information items

Asset strategy update	Information	All					
Procurement social value policy	Information	All					
Treasury management mid-year review	Information	All					
Audit panel update	Information	All					
Reserves update	Information	All					
Capital programme review	Information	All					2023-24

Corporate Priorities		
Priority		
1	Open Lewisham	CP 1
2	Quality Housing	CP 2
3	Children and Young People	CP 3
4	A Strong Local Economy	CP 4
5	Health & Wellbeing	CP 5
6	Cleaner and greener	CP 6
7	Safer Communities	CP 7

FORWARD PLAN OF KEY DECISIONS

Forward Plan February 2023 - May 2023

This Forward Plan sets out the key decisions the Council expects to take during the next four months.

Anyone wishing to make representations on a decision should submit them in writing as soon as possible to the relevant contact officer (shown as number (7) in the key overleaf). Any representations made less than 3 days before the meeting should be sent to Emma Aye-Kumi, the Local Democracy Officer, at the Council Offices or emma.aye-kumi@lewisham.gov.uk. However the deadline will be 4pm on the working day prior to the meeting.

A “key decision”* means an executive decision which is likely to:

- (a) result in the Council incurring expenditure which is, or the making of savings which are, significant having regard to the Council's budget for the service or function to which the decision relates;
- (b) be significant in terms of its effects on communities living or working in an area comprising two or more wards.

January 2022	Contract for Statutory Funeral Provision	28/06/22 Executive Director for Community Services	Corinne Moocarme, Joint Commissioning Lead, Community Support and Care, Community Services, LBL and Councillor Paul Bell, Cabinet Member for Health and Adult Social Care		
June 2022	Digital Infrastructure Fibre	28/06/22	and Councillor Amanda		

FORWARD PLAN – KEY DECISIONS					
Date included in forward plan	Description of matter under consideration	Date of Decision Decision maker	Responsible Officers / Portfolios	Consultation Details	Background papers / materials
	Wayleave	Executive Director for Corporate Services	De Ryk, Cabinet Member for Finance and Strategy		
May 2022	Expert Assessors services for Concessionary Award Schemes	28/06/22 Executive Director for Corporate Services	and Councillor Chris Barnham, Cabinet Member for Children's Services and School Performance		
May 2022	Procurement of a replacement Housing Management System and implementation of a Customer Relationship Management System.	28/06/22 Executive Director for Corporate Services	and Councillor Amanda De Ryk, Cabinet Member for Finance and Strategy		
May 2022	Procurement of Learning and Development Services Provider	28/06/22 Executive Director for Corporate Services	and Councillor Amanda De Ryk, Cabinet Member for Finance and Strategy		
October 2022	Approval to procure for the provision of pre-paid card accounts	02/11/22 Executive Director for Corporate Services	Adeolu Solarin, MARAC Co-ordinator and Councillor Amanda De Ryk, Cabinet Member for Finance and Strategy		
June 2022	Permission to Tender Lawrence House Ground Floor Refurbishment Works	02/11/22 Executive Director for Housing, Regeneration & Environment	Gavin Plaskitt, Programme Manager and Councillor Amanda De Ryk, Cabinet Member for Finance and Strategy		
October 2022	Approval to procure for the provision of Fixed Asset Valuations	07/12/22 Executive Director for Corporate	Kathy Freeman, Executive Director for Corporate Resources and		

FORWARD PLAN – KEY DECISIONS					
Date included in forward plan	Description of matter under consideration	Date of Decision Decision maker	Responsible Officers / Portfolios	Consultation Details	Background papers / materials
		Services	Councillor Amanda De Ryk, Cabinet Member for Finance and Strategy		
August 2022	Walsham - Budget Requirement	07/12/22 Mayor and Cabinet	James Ringwood, Housing Delivery Manager and Councillor Brenda Dacres, Deputy Mayor and Cabinet Member for Housing Development and Planning		
October 2022	Award reports for Adult Weight Management Services:Universal offer; Targeted offer	11/01/23 Executive Director for Community Services	and		
August 2022	Award report for NHS Health Checks provision	01/02/23 Mayor and Cabinet	Iain McDiarmid, Assistant Director - Adult Integrated Commissioning and Councillor Juliet Campbell, Cabinet Member for Communities, Refugees and Wellbeing		
June 2022	Building for Lewisham Budget requirements Pt1 & Pt2	01/02/23 Mayor and Cabinet	James Ringwood, Housing Delivery Manager and Councillor Brenda Dacres, Deputy Mayor and Cabinet Member for Housing Development and Planning		

FORWARD PLAN – KEY DECISIONS					
Date included in forward plan	Description of matter under consideration	Date of Decision Decision maker	Responsible Officers / Portfolios	Consultation Details	Background papers / materials
December 2022	Contract for Microsoft Azure Agreement - delegate authority for award	01/02/23 Mayor and Cabinet	Philippa Brewin and Councillor Amanda De Ryk, Cabinet Member for Finance and Strategy		
October 2022	Determination of Lewisham's admission arrangements for the 2024/25 academic year	01/02/23 Mayor and Cabinet	and		
January 2022	Lewisham Autism Strategy	01/02/23 Mayor and Cabinet	Polly Pascoe, Integrated Commissioning Manager and Councillor Paul Bell, Cabinet Member for Health and Adult Social Care		
May 2022	On Street Advertising Contract Variation and Extension	01/02/23 Mayor and Cabinet	and Councillor Amanda De Ryk, Cabinet Member for Finance and Strategy		
June 2022	Parts 1 & 2 - Recommendation regarding the delivery of Extra Care Services by Housing 21 at Cinnamon Court Deptford	01/02/23 Mayor and Cabinet	Beate Hellawell, Scrutiny Manager and Councillor Juliet Campbell, Cabinet Member for Communities, Refugees and Wellbeing		
December 2022	Permission to Extend the Humankind (Adult Substance Misuse Contract)	01/02/23 Mayor and Cabinet	Sarah Wainer, Director of System Transformation and		
December 2022	Right to buyback 1 extension	01/02/23 Mayor and Cabinet	Georgina Nunney, Principal Lawyer and Councillor Brenda Dacres, Deputy Mayor and Cabinet Member for		

FORWARD PLAN – KEY DECISIONS					
Date included in forward plan	Description of matter under consideration	Date of Decision Decision maker	Responsible Officers / Portfolios	Consultation Details	Background papers / materials
			Housing Development and Planning		
December 2022	Statement of Community Involvement	01/02/23 Mayor and Cabinet	Michael Forrester, Major and Strategic Projects Manager and Councillor Brenda Dacres, Deputy Mayor and Cabinet Member for Housing Development and Planning		
October 2022	2023-24 Budget Report	08/02/23 Mayor and Cabinet	Katharine Nidd, Head of Strategic Finance, Planning and Commercial and Councillor Amanda De Ryk, Cabinet Member for Finance and Strategy		
June 2022	BfL Appropriation for Planning purposes	08/02/23 Mayor and Cabinet	James Ringwood, Housing Delivery Manager and Councillor Sophie Davis, Cabinet Member for Housing Management and Homelessness		
June 2022	Approval to appoint operator for concessions contract at Beckenham Place Park Lake	Not before 01/03/23 Mayor and Cabinet	Vince Buchanan, Green Spaces Contracts Manager and Councillor Andre Bourne, Cabinet Member for Culture and Leisure (job share)		
February 2022	BfL Programme - Approval to enter into contract	Not before 01/03/23 Mayor and Cabinet	James Ringwood, Housing Delivery		

FORWARD PLAN – KEY DECISIONS					
Date included in forward plan	Description of matter under consideration	Date of Decision Decision maker	Responsible Officers / Portfolios	Consultation Details	Background papers / materials
			Manager and Councillor Paul Bell, Cabinet Member for Health and Adult Social Care		
October 2022	Budget Report 2023/24	01/03/23 Council	David Austin, Director of Corporate Services, Kathy Freeman, Executive Director for Corporate Resources, Katharine Nidd, Head of Strategic Finance, Planning and Commercial and Councillor Amanda De Ryk, Cabinet Member for Finance and Strategy		
January 2023	Adventure Playgrounds: Procurement of Play Service and Site Maintenance and Development Service	08/03/23 Mayor and Cabinet	and Councillor Chris Barnham, Cabinet Member for Children's Services and School Performance		
January 2023	Approval to Award report for Agency Managed Service Provider Procurement	08/03/23 Mayor and Cabinet	Courtney Richards and Councillor Amanda De Ryk, Cabinet Member for Finance and Strategy		
November 2022	Approval to confirm an Article 4 Direction to withdraw permitted development rights for the change of use from dwelling house (Use class C3) to small HMO's (Use Class C4)	08/03/23 Mayor and Cabinet	David Syme, Head of Strategic Planning and		
November 2022	Approval to confirm an Article	08/03/23	David Syme, Head of		

FORWARD PLAN – KEY DECISIONS					
Date included in forward plan	Description of matter under consideration	Date of Decision Decision maker	Responsible Officers / Portfolios	Consultation Details	Background papers / materials
	4 Direction to withdraw permitted development rights for the change of use from Use class E (retail, office and industrial) to Use class C3 (dwelling house) within our town centres, industrial areas and employment sites	Mayor and Cabinet	Strategic Planning and		
December 2022	Approval to Procure for the provision of Occupational Health Service and Employee Assistance Programme Provider. Approval for the subsequent award of contract.	08/03/23 Mayor and Cabinet	Megan Mellor, Community Coordinator and		
November 2022	Approval to re-procure the Lewisham Learning Disability Framework Agreement	08/03/23 Mayor and Cabinet	Tom Bird, Integrated Commissioning Manager and		
December 2022	Approval to transfer the procurement service (4C) for Housing Development from Lewisham Homes to LB Lewisham	08/03/23 Mayor and Cabinet	Patrick Dubeck, Director of Inclusive Regeneration and Councillor Sophie Davis, Cabinet Member for Housing Management and Homelessness		
November 2022	CIL Governance	08/03/23 Mayor and Cabinet	and		
December 2022	Corporate Software Solutions - Oracle Fusion/Evosys	08/03/23 Mayor and Cabinet	Sarah Lang, Development Officer and Councillor Amanda De Ryk, Cabinet Member for Finance and Strategy		

FORWARD PLAN – KEY DECISIONS					
Date included in forward plan	Description of matter under consideration	Date of Decision Decision maker	Responsible Officers / Portfolios	Consultation Details	Background papers / materials
November 2022	Learning Disability Framework: approval to procure supported living contract	08/03/23 Mayor and Cabinet	Tom Bird, Integrated Commissioning Manager and		
November 2022	Lewisham Climate Emergency Action Plan	08/03/23 Mayor and Cabinet	and		
January 2023	Lewisham Modern Slavery Statement 2023-24	08/03/23 Mayor and Cabinet	James Lee, Director of Communities, Partnerships and Leisure and		
December 2022	Network Links (circuits, broadband, PSTNs)	08/03/23 Mayor and Cabinet	Philippa Brewin and Councillor Amanda De Ryk, Cabinet Member for Finance and Strategy		
January 2023	Permission to extend Lewisham residents' access to Sexual Health London (SHL) for delivery of online sexual and reproductive health services (e-service)	08/03/23 Mayor and Cabinet	Iain McDiarmid, Assistant Director - Adult Integrated Commissioning and Councillor Paul Bell, Cabinet Member for Health and Adult Social Care		
October 2022	Permission to extend the current lead home care provider contracts	08/03/23 Mayor and Cabinet	Tristan Brice, Associate Director, Community Support and Care and		
December 2022	Permission to tender (Mental Health Supported Housing for Care Leavers)	08/03/23 Mayor and Cabinet	Jonathan Scarth and Councillor Paul Bell, Cabinet Member for Health and Adult Social Care		
December 2022	Permission to tender (Mental	08/03/23	Jonathan Scarth and		

FORWARD PLAN – KEY DECISIONS					
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	Health Supported Housing)	Mayor and Cabinet	Councillor Paul Bell, Cabinet Member for Health and Adult Social Care		
June 2022	Reduction and Recycling Plan 2023-2025	08/03/23 Mayor and Cabinet	Wendy Nicholas, Strategic Waste and Environment Manager and Councillor Louise Krupski, Cabinet Member for Environment and Climate		
June 2022	Right to Buyback 2	08/03/23 Mayor and Cabinet	Kathy Freeman, Executive Director for Corporate Resources and Councillor Brenda Dacres, Deputy Mayor and Cabinet Member for Housing Development and Planning		
October 2022	Selective licensing: Consultation response and proposals to introduce a new licensing scheme	08/03/23 Mayor and Cabinet	Rhona Brown, Head of Private Sector Licensing and Housing Improvement and Councillor Brenda Dacres, Deputy Mayor and Cabinet Member for Housing Development and Planning		
November 2022	Temporary Accommodation Acquisition Procurement (Part 1 & 2)	08/03/23 Mayor and Cabinet	Andrew Jacobs, Organisational Learning and Talent Manager and		

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June 2022	BfL Programme - Approval to enter into contract	04/23 Mayor and Cabinet	James Ringwood, Housing Delivery Manager and Councillor Sophie Davis, Cabinet Member for Housing Management and Homelessness		
December 2022	Mayfield - Budget Requirement	04/23 Mayor and Cabinet	James Ringwood, Housing Delivery Manager and Councillor Brenda Dacres, Deputy Mayor and Cabinet Member for Housing Development and Planning		
December 2022	Ladywell - Budget requirement	07/23 Mayor and Cabinet	James Ringwood, Housing Delivery Manager and Councillor Brenda Dacres, Deputy Mayor and Cabinet Member for Housing Development and Planning		

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