



# SUMMONS AND AGENDA

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## MAYOR AND CABINET

**Date: WEDNESDAY, 7 FEBRUARY 2024 at 5.00 pm**

**Civic Suite  
Catford Road  
London SE6 4RU**

**Enquiries to: Emma Campbell Smith  
Email: [emma.campbellsmith@lewisham.gov.uk](mailto:emma.campbellsmith@lewisham.gov.uk)**

### **MEMBERS**

Brenda Dacres	Deputy Mayor (Acting as Mayor) and Housing Development and Planning
Councillor Chris Barnham	Children, Young People and Community Safety
Councillor Paul Bell	Health and Adult Social Care
Councillor Juliet Campbell	Communities, Refugees and Wellbeing
Councillor Will Cooper	Cabinet Member for Housing and Housing Management
Councillor Amanda De Ryk	Finance and Strategy
Councillor Louise Krupski	Environment and Climate Action
Councillor Kim Powell	Businesses, Jobs and Skills
Councillor James-J Walsh	Culture and Leisure

**Members are summoned to attend this meeting**



**Jeremy Chambers, Monitoring Officer  
Laurence House  
Catford Road  
London SE6 4RU  
Date: Tuesday, 30 January 2024**

The public are welcome to attend our committee meetings, however occasionally committees may have to consider some business in private.

## ORDER OF BUSINESS – PART 1 AGENDA

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3.	Matters raised by scrutiny and other constitutional bodies None.	
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## MINUTES OF THE MAYOR AND CABINET

Wednesday, 24 January 2024 at 6.00 pm

PRESENT: Councillors Brenda Dacres, Chris Barnham, Paul Bell, Juliet Campbell, Will Cooper, Amanda De Ryk, Louise Krupski, Kim Powell, and James-J Walsh.

MEMBER(S) ATTENDING REMOTELY: None.

MEMBER(S) PRESENT UNDER STANDING ORDERS: Councillor Stephen Penfold

OFFICERS PRESENT IN PERSON: Jennifer Daothong (Chief Executive); Jeremy Chambers (Director of Law and Corporate Governance/Monitoring Officer), and Jasmine Kassim (Senior Committee Manager).

No apologies for absence were received.

### 1. Minutes

The Minutes of the last meeting on 6 December 2023 were agreed.

### 2. Declaration of Interests

No interests were declared.

### 3. Matters Raised by Scrutiny and other Constitutional Bodies

The meeting received:

- A report introduced by Councillor Penfold regarding the motion from Brockley Local Assembly on Community Space.
- A report relating to a referral from the Public Accounts Select Committee on Social Value.
- Reports to responses to previously received referrals from the Sustainable Development Select Committee (SDSC) on Sustainable Streets, and on Levelling Up Fund Programme in Lewisham Town Centre.

The Mayor (Acting) and Cabinet, having considered the reports, REVOLVED to:

- Note the motion from Brockley Assembly regarding community space and plans for Brockley Social Club and agreed that the relevant officers provide a response at a future Mayor and Cabinet meeting.
- Note comments and views of the Public Accounts Select Committee that arose from discussions on the Council's social value annual report and agreed that the relevant officers provide a response.
- Note officers' response to comments from the Sustainable Development Select Committee on the Levelling Up Fund Programme in Lewisham Town Centre.

- Note officers' responses to the comments of the Sustainable Development Select Committee on the Sustainable Streets Programme and that those be provided to the Sustainable Development Select Committee.

#### **4. Period 8 Budget Monitoring**

The meeting received a report introduced by Councillor De Ryk in relation to the following:

- The financial monitoring position for the 2023/24 financial year.
- The latest position on the following:
  - the Council's General Fund;
  - the Dedicated Schools Grant;
  - the Housing Revenue Account, and the Collection Fund and the Capital Programme; and
  - an update on progress against savings delivery.
- The Council-wide financial forecast for General Fund activities.
- The work of the extended leadership team on savings and cost avoidance measures.
- Timeline of engagement and decision-making regarding the Council's financial activities up to 29 January 2024.

The Mayor (Acting) and Cabinet, having considered the open officer report, Councillor De Ryk MOVED, Barnham SECONDED, and it was RESOLVED to:

- Note the current financial forecasts for the year ending 31 March 2024 and that the Executive Management team continue to work in bringing forward action plans to manage down budget pressures within their directorates.
- Note that Lewisham had been allocated £1m of grant funding as a local authority in tranche 3 of the Delivering better Value (DbV) initiative. The bid, based on workstreams that the local authority will progress based on the findings from case study work undertaken, with the focus on training, development and culture change, aimed at supporting Lewisham to reduce the historic deficit on the high needs block.
- Approve the write off of unrecoverable business rates debts totalling £166k as set out in paragraph 18.2 of the report.

#### **5. Permission to procure and award Repair and Maintenance of Ventilation Plant and Controls**

The meeting received a report introduced by Councillor Cooper regarding the re-procurement, and award of the contract for a period of 2 years with the option to extend for up to a further 2 years for the repair and maintenance of ventilation plant and controls with a total contract value of £1.4m over 4 years.

It was recognised that an extension of 9 months to the existing contract was mutually agreed with the incumbent provider and the current schedule of rates had been held.

The Mayor (Acting) and Cabinet, having considered the open officer report, Councillor Cooper MOVED, Councillor Krupski SECONDED, and it was RESOLVED to:

- Approve the re-procurement of Repair and Maintenance of Ventilation Plant and Controls for a period of 2 years with the option to extend for a further 2 years with a total contract value of £1.4m over 4 years.
- Approve the use of the Crown Commercial Services Framework Agreement (RM6232) – Lot 2a: Hard Facilities Management to carry out the procurement via a mini competition.
- Approve the award of contract to the preferred service provider for the provision of Repair and Maintenance of Ventilation Plant and Controls.
- Delegate authority to the Executive Director for Housing, in consultation with Director of Law and Corporate Governance and the Director of Housing Quality and Investment to select the preferred provider in accordance with the selection and award criteria published in the tender documentation and agree the award and final form of the contract.

**6. Approval to procure a Housing Stock Condition Survey and Housing Disrepair Survey Programme via Direct Award**

The meeting received a report introduced by Councillor Cooper that supported the Council's aim of working to provide residents with safe, comfortable accommodation, including energy efficiency measures as part of its ambition to be carbon-neutral by 2030.

Information that the Council was undertaking its statutory duty to maintain its housing stock to a good state of repair was welcomed by Members.

The Mayor (Acting) and Cabinet, having considered the open officer report, Councillor Cooper MOVED, Councillor Barnham SECONDED, and it was RESOLVED to:

- Grant approval to procure a programme of stock condition surveys targeting up to 80% of the Council's housing stock, incorporating energy performance assessments and up to 500 Housing Disrepair surveys to address the current backlog, for the purposes of planning our asset strategy and strategic investment plans, with a total contract value of £2,925,000.
- Approve the use of the Strategic Asset Management agreement - Lot 6 of the Procurement Hub framework.
- Approve the direct award of contract to Savills (UK) Limited in accordance with the terms of Lot 6 (Strategic Asset Management) of the Procurement Hub framework.

**7. Permission to establish a DPS framework for provision of transport services**

The meeting received the report introduced by Councillor Barnham which sets out recommendations to approve and establish a new a new Dynamic Purchasing System (DPS) for Taxis and Minibus Travel Assistance from 1 April 2024 for two years, with the option to extend for a further four years.

The Mayor (Acting) and Cabinet, having considered the open officer report, Councillor Barnham MOVED, Councillor Krupski SECONDED, and it was RESOLVED to:

- Approve the establishment of a Dynamic Purchasing System (“DPS”) for taxi and minibus travel assistance for two years, with the option to extend for up to a further four years up to a maximum value of £38.4m over the lifetime of the DPS (six years).
- Approve the admission of the preferred providers onto the DPS, provided that they meet the selection and award criteria for admission as set out in the tender documents.
- Delegate authority to Executive Director for Children and Young People (in consultation with the Director of Law and Corporate Governance to select the preferred providers in accordance with the selection and award criteria published in the tender documentation.
- Approve an extension of up to 10 months until 31<sup>st</sup> March 2024 of the current DPS at cost of £4.5m.
- Approve the award of contract from the YPO single supplier framework to Access Adam Care Commissioning for the DPS software licence, which provides the multifunctional platform and support functions needed to operate the DPS. The contract length will be for two years from 1 April 2024 with the option to extend for a further four years. The total value of the contract is £338.8k.

## **8. Determined Admissions Arrangements**

The meeting received the report introduced by Councillor Barnham regarding the Council’s Determined Admissions Arrangements for 2025/26. Councillor Barnham highlighted two changes to the previous arrangements, which were consulted on during the period 27 November 2023 to 12 January 2024 as follows:

- A decrease in the Published Admissions Number at Deptford Park Primary School from 90 to 60.
- Amendment to the admissions policies for mainstream community school to give preference to children of staff members.

The Mayor (Acting) and Cabinet, having considered the open officer report, Councillor Barnham MOVED, Councillor Krupski SECONDED, and it was RESOLVED:

- To approve the local authority’s admissions arrangements for the academic year 2025/26 as outlined in the report.

## **9. Green Space Management and Maintenance Contract**

The meeting received the report introduced by Councillor Walsh regarding the procurement of a new 15-year Green Space Management and Maintenance Contract commencing 1 January 2025, with a request to approve the award of contract provided that the contract sum does not exceed agreed budgets.

Information that the Council's 16 nature conservation sites would remain outside of the scope of the new contract because a careful, specialist, and iterative management would be required to protect the species and habitats present in those environments was welcomed by Members.

The Mayor (Acting) and Cabinet, having considered the open officer report, Councillor Walsh MOVED, Councillor Bell SECONDED, and it was RESOLVED to:

- Approve the procurement of a new 15-year Green Space Management and Maintenance Contract commencing 1 January 2025 and approve the award of contract provided that the contract sum does not exceed agreed budgets.
- Delegate authority to Executive Director for Community Services (in consultation with Director of Law and Corporate Governance and the Director of Communities, Partnerships and Leisure) to select the preferred provider in accordance with the selection criteria and award criteria published in the tender documentation and agree and enter into the final form of contract.
- Agree in principle to the disposal land as envisaged by this report and authorise ED Community Services in consultation with the Director of Law and Corporate Governance and Director of Communities, Partnerships and Leisure to advertise any disposal of open space as required by section 123(2A) Local Government Act 1972
- Delegate authority to ED Community Services to consider and determine any objections made in response to any advert for the open space disposal in accordance with recommendation 2.3 above.
- Agree that subject to the responses to the advertisement above, and to compliance with best consideration requirements in section 123(2) Local Government Act, to delegate authority to the ED Community Services in consultation with the Director for Law and Corporate Governance and Director of Communities, Partnerships and Leisure to agree lease terms and enter into a lease with the selected provider.

#### **10. Approval to procure a workspace provider to deliver affordable workspace at Town Hall Chambers**

The meeting received the report introduced by Councillor Powell which requested agreement to approve the Economy, Jobs, and Partnerships team to undertake the procurement of a provider to deliver Affordable Workspace within the Town Hall Chambers for a minimum period of five years with the option for a further year of delivery.

Information that the potential provider would be expected to offer the space to a variety of users within the creative sector was welcomed by Members.

The Mayor (Acting) and Cabinet, having considered the report, Councillor Powell MOVED, Councillor Cooper SECONDED, and it was RESOLVED to:

- Approve the procurement of a provider for the provision of affordable workspace within the Town Hall Chambers. The value of the contract to the Provider will be estimated £168,000 per annum and a total of



£1,008,000.00 for the whole contract period. The contract will be for a period of 5 years with an option for a further year of delivery.

- Agree to extend contract of Bow Arts to deliver workspace in the 4th Floor Old Town Hall until the 31st December 2024 or until the termination of the lease by the Council.
- Approve the award of contract and entry into a lease with the preferred service provider for the provision of affordable workspace.
- Delegate authority to the Executive Director for Place (in consultation with Director of Law and Corporate Governance and the Cabinet Member for Business, Jobs and Skills to select the preferred service provider in accordance with the selection and award criteria published in the tender documentation and agree final form of contract and lease.

#### **11. Catford Regeneration Partnership Limited (CRPL) Update**

The meeting received an update report introduced by Councillor Dacres regarding the Catford Regeneration Partnership Limited (CRPL).

The Mayor (Acting) and Cabinet, having considered the officer open report, Councillor Dacres MOVED, Councillor Bell SECONDED, and it was RESOLVED to:

- Note the current operating position of the company including the latest cashflow projection and associated assumptions.
- Agree that the Council, as sole shareholder of CRPL, continue to provide additional financial support to the company through parent company guarantee to enable it to continue to manage and operate the assets within and around the Catford Centre.
- Agree a further deferment of loan interest payments and capitalisation on the current loan for a further two years to 2026 to enable the company to stabilise its cashflow.
- Agree that as part of the wider Catford Town Centre Regeneration plan, to agree the disposal of the former Thomas Lane Depot site and delegate authority to the Executive Director of Corporate Resources, in consultation with the Executive the Director for Place, to agree final terms of the disposal. The receipt from the disposal will be used to pay down part of the loan with the Council and help stabilise the Company's cashflow in the short-term.
- Note that the outcome of an ongoing review of the Company together with a new Business Plan detailing further efforts that the company will be making to ensure it continues to operate the centre in a manner that remains consistent with the outcomes agreed at its inception will be reported to Mayor and Cabinet in due course.

#### **12. Building for Lewisham, Appropriation for Planning Purposes: Former Fairlawn Primary School Annexe Site and Former Ladywell Leisure Centre Site**

The meeting received a report introduced by Councillor Dacres regarding Building for Lewisham, Appropriation for Planning Purposes programme in relation to the

Former Fairlawn Primary School Annexe Site and Former Ladywell Leisure Centre Site.

The Mayor (Acting) and Cabinet, having considered the officer open report, Councillor Dacres MOVED, Councillor Cooper SECONDED, and it was RESOLVED to:

- Agree to the appropriation of the Council-owned land known as the former Fairlawn Primary School Annexe, as outlined in red on the plan attached at Appendix A, from housing purposes to planning purposes under Section 122 of the Local Government Act 1972, as it is no longer required for the purpose for which it is currently held and the Council believes that the acquisition will facilitate the carrying out of development, re-development or improvement on or in relation to the land pursuant to section 226(1)(a) of the Town and Country Planning Act 1990;
- Agree to the appropriation of the Council owned land known as the Former Fairlawn Primary School Annexe, as outlined in red on the plan attached at Appendix A, from planning purposes back to housing purposes under Section 122 of the Local Government Act 1972;
- Agree to the appropriation of the Council-owned land known as the former Ladywell Leisure Centre, as outlined in red on the plan attached at Appendix B, from housing purposes to planning purposes under Section 122 of the Local Government Act 1972, as it is no longer required for the purpose for which it is currently held, and the Council believes that the acquisition will facilitate the carrying out of development, re-development or improvement on or in relation to the land pursuant to section 226(1)(a) of the Town and Country Planning Act 1990;
- Agree to the appropriation of the Council-owned land known as the former Ladywell Leisure Centre, as outlined in red on the plan attached at Appendix B, from planning purposes back to housing purposes under Section 122 of the Local Government Act 1972;
- Delegate authority to the Executive Director Place in consultation with the Director of Law, Governance and Elections to deal with any necessary arrangements to record the appropriation of the site for planning purposes including the transfer of the land from the Housing Revenue Account (HRA) to the General Fund account (GF) at the current red book value; the transfer of the land from the GF to the HRA at the current red book value; to negotiate and enter into agreements by deed and payment of compensation for the release of third-party rights where this can be achieved on reasonable terms within a reasonable timescale; and to take all necessary steps to settle claims for compensation pertaining to rights of light under section 204 of the Housing and Planning Act 2016.

### **13. Building for Lewisham: Approval of Capital Budgets and Procurement Strategy - PART 1**

The meeting received a report introduced by Councillor Dacres requesting approval of Capital Budget and Procurement Strategy relating to the Building for Lewisham, programme.

The Mayor (Acting) and Cabinet, having considered the officer open report, proposed that the recommendations in Part 2 of the report be agreed in the Part 1 session of the meeting, and thereafter, Councillor Dacres MOVED, Councillor Walsh SECONDED, and it was RESOLVED to:

- Approve the updated forecast Contract Sums as detailed in Part 2 of this report;
- Approve the forecast total scheme On-Costs as detailed in Part 2 of the report;
- Approve the updated forecast Total Scheme Costs as detailed in Part 2 of the report;
- Approve the allocation of Right to Buy receipts to contribute to the funding for Valentine Court, Mayfield, Fairlawn, and Ladywell Park Gardens, as detailed in Part 2 of the report;
- Approve the receipt and use of GLA grant to contribute to the funding for Valentine Court, Mayfield, Fairlawn, and Ladywell Park Gardens, as detailed in Part 2 of the report;
- Approve such additional GLA or other grant funding that facilitates successful delivery and delegate authority to the Executive Director of Housing Regeneration and Public Realm in consultation with the Director of Law and Corporate Governance to approve and enter into such agreements and ancillary documentation as may be required to utilise such grant funding;
- Approve the procurement strategies for demolition, enabling and main works construction contracts for Valentine Court, Mayfield, Fairlawn, and Ladywell Park Gardens, as further detailed in Part 2 of the report;
- Approve the procurement strategies and the progress to tender of the sites at Valentine Court, Mayfield, Fairlawn, and Ladywell Park Gardens, and delegates authority to ED Place (in consultation with Director of Law and Governance) to enter into contract with the most economically advantageous tenderer as determined by the evaluation criteria set out in the tender documentation provided the relevant contract sum is within the financial limits set out in the Part 2 report.
- Approve the procurement of a Principal Contractor for Valentine Court, delegate authority to the Executive Director for Place to award a Pre-Construction Services Agreement (PCSA) to the most economically advantageous tenderer (to be determined in accordance with the published evaluation criteria) and, subject to both satisfactory performance of the PCSA and provided the contract sum is within the limits set out in the Part 2 report, delegate authority to the Executive Director for Place to enter into the main works contract with the PCSA contractor.
- Delegate authority to the Executive Director, Place (in consultation with the Executive Director for Housing, Regeneration and Public Realm and with the Director of Law, and Corporate Governance), to agree the final contract sum for demolition and enabling works for Mayfield and Fairlawn, up to delegated authority approval levels;
- Delegate authority to the Executive Director, Place to approve the estimated costs detailed in part 2 of this paper for remedial works to Longfield Crescent to continue on the first two houses while further surveys on the other houses and flats are undertaken.

#### **14. Thomas Lane Yard - Acquisition and Planning Submission - PART 1**

The meeting received a report introduced by Councillor Dacres regarding the Thomas Lane Yard acquisition and planning submission.

The Mayor (Acting) and Cabinet, having considered the officer open report, proposed that the recommendations in Part 2 of the report be agreed in the Part 1 session of the meeting, and thereafter, Councillor Dacres MOVED, Councillor Walsh SECONDED, and it was RESOLVED to:

- Note the progress on developing the Thomas Lane Yard scheme, including the proposed housing mix;
- Approve the freehold acquisition of land from Catford Regeneration Partnership Ltd shown shaded in green and pink on the plan in Appendix 1 of the report;
- Delegate authority to the Executive Director of Place to:
  - Agree final terms for the freehold acquisition
  - Agree final terms for the leaseback arrangement with CRPL pending vacant position of the site being required
  - Agree the final scheme and submit a full planning application to the Local Planning Authority .

#### **15. Approval to appoint operator for concessions contract at Beckenham Place Park Lake - PART 1**

The meeting received the report introduced by Councillor Krupski relating to the award of a concession contract to PTP Coaching Ltd for the provision of swimming and other lake activities in Beckenham Place Park.

The Mayor (Acting) and Cabinet, having considered the officer open report, proposed that the recommendations in Part 2 of the report be agreed in the Part 1 session of the meeting, and thereafter, Councillor Walsh MOVED, Councillor Krupski SECONDED, and it was RESOLVED to:

- Approve the award of a concession contract to PTP Coaching Ltd for the provision of swimming and other lake activities in Beckenham Place Park. The contract will be for five years, commencing 1 June 2024, and will provide investment into the site and an income to the Council based on a combination of rent and percentage share of annual gross turnover.
- Agree in principle to the disposal of open space and authorise the Director of Communities, Partnerships and Leisure to advertise the disposal as required by section 123(2A) Local Government Act 1972.
- Delegate authority to the Executive Director for Community Services to consider and determine any objections made in response to the advert for the open space disposal advertised in accordance with recommendation 2.2 in the report.
- Agree that subject to the responses to the advertisement above, delegate authority to the Executive Director for Community Services in consultation with the Director for Law and Corporate Governance to agree lease terms

and enter into a lease in accordance with section 123 Local Government Act 1972.

- Agree to award a concession contract to PTP Coaching Ltd. to manage lake activities (swimming & boating) on the lake at Beckenham Place Park and lease.

**16. Exclusion of Press and Public**

The Mayor (Acting) and Cabinet noted that recommendations relating to Item 17, Item 18, and Item 19, which were to be considered under Section 100 (A) (4) of the Local Government Act 1972 in Part 2 of the agenda had been agreed in the open part of the meeting.

**17. Building for Lewisham: Approval of Capital Budgets and Procurement Strategy - PART 2**

The recommendations were agreed in the open part of the meeting.

**18. Thomas Lane Yard - Acquisition and Planning Submission - PART 2**

The recommendations were agreed in the open part of the meeting.

**19. Approval to appoint operator for concessions contract at Beckenham Place Park Lake - PART 2**

The recommendations were agreed in the open part of the meeting.

The meeting closed at 6.37 pm.

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Mayor (Acting)



## Mayor and Cabinet

### Declaration of Interests

**Date:** 7 February 2024

**Class:** Part 1

**Contributors:** Head of Governance and Committee Services

### Outline and recommendations

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

#### Declaration of interests

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

#### 1 Personal interests

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

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

#### 2 Disclosable pecuniary interests are defined by regulation as:-

- (a) Employment, trade, profession or vocation of a relevant person\* for profit or gain
- (b) Sponsorship –payment or provision of any other financial benefit (other than by the Council) within the 12 months prior to giving notice for inclusion in the register in respect of expenses incurred by you in carrying out duties as a member or towards your election expenses (including payment or financial benefit from a Trade Union).

- (c) Undischarged contracts between a relevant person\* (or a firm in which they are a partner or a body corporate in which they are a director, or in the securities of which they have a beneficial interest) and the Council for goods, services or works.
- (d) Beneficial interests in land in the borough.
- (e) Licence to occupy land in the borough for one month or more.
- (f) Corporate tenancies – any tenancy, where to the member’s knowledge, the Council is landlord and the tenant is a firm in which the relevant person\* is a partner, a body corporate in which they are a director, or in the securities of which they have a beneficial interest.
- (g) Beneficial interest in securities of a body where:-
  - (a) that body to the member’s knowledge has a place of business or land in the borough; and
  - (b) either
    - (i) the total nominal value of the securities exceeds £25,000 or 1/100 of the total issued share capital of that body; or
    - (ii) if the share capital of that body is of more than one class, the total nominal value of the shares of any one class in which the relevant person\* has a beneficial interest exceeds 1/100 of the total issued share capital of that class.

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

### **(3) Other registerable interests**

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

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

### **(4) Non registerable interests**

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

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

- (a) Where a member has any registerable interest in a matter and they are present at a meeting at which that matter is to be discussed, they must declare the nature of the interest at the earliest opportunity and in any event before the matter is considered. The declaration will be recorded in the minutes of the meeting. If the matter is a disclosable pecuniary interest the member must take no part in consideration of the matter and withdraw from the room before it is considered. They must not seek improperly to influence the decision in any way. **Failure to declare such an interest which has not already been entered in the Register of Members' Interests, or participation where such an interest exists, is liable to prosecution and on conviction carries a fine of up to £5000**
- (b) Where a member has a registerable interest which falls short of a disclosable pecuniary interest they must still declare the nature of the interest to the meeting at the earliest opportunity and in any event before the matter is considered, but they may stay in the room, participate in consideration of the matter and vote on it unless paragraph (c) below applies.
- (c) Where a member has a registerable interest which falls short of a disclosable pecuniary interest, the member must consider whether a reasonable member of the public in possession of the facts would think that their interest is so significant that it would be likely to impair the member's judgement of the public interest. If so, the member must withdraw and take no part in consideration of the matter nor seek to influence the outcome improperly.
- (d) If a non-registerable interest arises which affects the wellbeing of a member, their, family, friend or close associate more than it would affect those in the local area generally, then the provisions relating to the declarations of interest and withdrawal apply as if it were a registerable interest.
- (e) Decisions relating to declarations of interests are for the member's personal judgement, though in cases of doubt they may wish to seek the advice of the Monitoring Officer.

**(6) Sensitive information**

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

**(7) Exempt categories**



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

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



## Mayor and Cabinet

### Report title: 2024/25 Budget Report

**Date:** 07 February 2024

**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 2023/24 and to set the Budget for 2024/25. This report allows Mayor and Cabinet to recommend to Full Council the Council Tax to be agreed and housing rents to be set for 2024/25. It sets the Capital Programme for the next four years and the Council's Treasury Strategy for 2024/25.

The report provides information on the revenue budget reduction proposals necessary to help balance the budget for 2024/25, the allocation of budget growth to meet inflation pressures and service overspending and prepare to address the budget requirement for 2025/26.

Mayor and Cabinet are asked to consider the recommendations listed in this report at section 2.

## Timeline of engagement and decision-making

Public Accounts Select Committee considered the draft 2024/25 Budget Report on the 29 January 2024.

The Council Tax Base was approved by Council on the 17 January 2024.

Financial Monitoring P8 was approved by Mayor and Cabinet on 24 January 2024.

### 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 2024/25. These include the following:

#### 1.2 General Fund

- In respect of the General Fund, the assumed net revenue expenditure budget is £293.838m. This is made up of provisional Settlement Funding from government (revenue support grant and business rates), the inclusion of Section 31 grant relating to business rates funding 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 2024/25 net revenue budget of £293.838m are proposed on the basis of the following assumptions:
  - £7.945m of revenue budget reductions have been included for 2024/25, of which £2.315m were previously agreed and £5.630m assumed to be agreed and implemented.
  - An assumed 4.99% increase in Band D Council Tax for Lewisham's services for 2024/25; including the 2.99% increase in the core Council Tax as announced in the provisional Local Government Finance Settlement and 2% increase for the Adult Social Care precept.
  - £36.709 of funding allocated for risks and pressures in 2024/25, primarily to cover the services reporting a £30m overspend in 2023/24.
  - £1.844m of additional pay inflation to cover the gap from 2023/24.
  - £5.816m of pay inflation for 2024/25.
  - £4.401m of non-pay inflation for 2024/25.

#### 1.3 Fees and Charges

- This report also presents the 2024/25 proposed fees and charges and related annual increase for the majority of chargeable services, statutory and discretionary. In the main in-line with the Council's policy to increase charges by Consumer Price Index (CPI) plus 1% based on September inflation – 7.7% for 2024/25.

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

- The 2024/25 overall Dedicated Schools Grant (DSG) allocation is £363.126m (a 7% increase) (of which, £40.225m is part of the Early Years Block and remains provisional). Of this money, the Council will passport through the monies

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allocated to the Academy schools and notes that £11.381m relates to national policy changes on the EY entitlement offer being extended, so is effectively linked to new responsibilities.

- Schools block – A net increase of £9.63m (4%).
  - Central Services to Schools block – A net reduction of £0.295m (10%). This funding is for services that support schools including admission.
  - High Needs block – A net increase of £2.373m (3%). This funding supports those young people with Special Needs. In addition, Schools Forum have agreed to supplement this budget by £0.7m in 2024/25 and the Council continues to work with the Department for Education (DfE) on the national cumulative deficit being carried by Councils for running these services.
  - Early Years block – A net increase of £15.381m (38%). Overall, there is an increase in the hourly rates for 3-4 year olds from £6.33 to £7.24 (14%) and for 2 year olds £7.52 to £10.64 (41.4%) and the introduction of new funding for 2 year olds with working parent entitlement from 1 April 2024 at £10.64 and under 2 year olds from 1 September 2024 at an hourly rate of £14.52.
- Pupil Premium - funding rates are confirmed to increase by circa 1-2%, however the school-by-school final allocation will be advised in the summer 2024. The 2023/24 pupil premium figure is currently £15.167m.
  - Pupil numbers have decreased by a net 251, with a 351 decrease in primary and a 100 increase in secondary pupil numbers.

## 1.5 Housing

- A proposed rent increase at a maximum permissible of 7.7% (an average of £8.57 per week) in respect of dwelling rents, 7.7% (average £3.10 per week) in respect of hostels, and a range of other proposed changes to service charges on the same basis. The proposed annual expenditure for the Housing Revenue Account (HRA) is £224.3m in 2024/25, including the capital and new build programme.
- The proposed Capital Programme (HRA) budget for 2024/25 to 2028/29 of £620.8m, of which £112.8m is for 2024/25;
- Prior to the in-sourcing, from the 1 October 2023, of the Council's Arms Length Management Organisation (ALMO) – Lewisham Homes developed 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.
- Continuing to conduct urgent reviews and physical inspections of every property on the 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 service heads 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.

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- The following grants continue into 2024/25 and are broadly unchanged from 2023/24: Public Health Grant (£26.9m), Better Care Fund (£10.9m for the Council) and the Improved Better Care Fund (£14.9m).
- The following grants have increased and being used to fund pressures for 2024/25: Social Care Grant (£27.9m) and the ASC Market Sustainability and Improvement Fund (£6.0m).
- The following grants have continued but at significantly reduced levels and are being used to fund once off pressures only: New Homes Bonus (£2.0m) and Services Grant (£0.6m).
- The Discharge Grant provided in 2023/24 replaced monies already provided by Health partners and did not provide capacity for new growth, although this has been increased in 2024/25 to £3.5m it will be needed in full to meet additional demand.
- On 24 January 2024 government announced an additional £500m nationally of funding for councils with responsibility for adults and children's social care, distributed through the Social Care Grant. The allocation of this will be made in the Budget on the 6 March 2024. This additional funding will replace the £1.5m planned once off use of reserves in 2024/25.

## 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 remains prudent, in-line with last year, and officers continue to explore alternative investment options and opportunities to undertake debt restructuring in order to reduce cashflow, balance sheet risk and best fund the capital plans set out.
- There are no material changes to the strategy.

## 1.8 Capital

- The proposed Capital Programme (General Fund and Housing Revenue Account) budget for 2024/25 to 2027/28 is £558.0m; split £171.0m (31%) for the General Fund and £387.0m (69%) for the Housing Revenue Account. Of this programme £207.7m is for 2024/25 with £112.8m on the General Fund and £114.3m 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 29 January 2024.
- 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, that Mayor and Cabinet:

### **General Fund Revenue Budget**

- 2.3 notes and asks Council to note the 2023/24 forecast projected overall variance of £19.9m, after the use of corporate provisions and reserves, or 7.5% of the agreed budget of £263.680m as set out in section 6 of this report and that this 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 £2.315m and £8.423m, with an anticipated assumed minimum delivery of £5.6m in 2024/25, as set out in Section 6 of the report and summarised in Appendix Y1 and Y2a and Y2b;

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- 2.5 agrees and asks Council to agree the allocation of £52.869m of resources from; the corporate risks and pressures, adult social care precept, new homes bonus, social care grant, ASC market sustainability and improvement fund, discharge grant, New Homes Bonus, Services Grant and reserves in 2024/25 to be invested in funding quantified budget pressures and opportunities, both recurring and once-off, as set out in section 6;
- 2.6 agrees and recommend that Council agree to delegate to the Executive Director of Corporate Resources the use of the new additional social care grant allocation instead of reserves for the funding of once off pressures in 2024/25, as set out in section 6;
- 2.7 agrees to recommend to Council that a General Fund Budget Requirement of £293.838m for 2024/25 be approved;
- 2.8 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 £1,566.58 for Lewisham's services and £2,037.98 overall. This represents an overall increase in Council Tax for 2024/2/25 of 5.8% and is subject to the GLA precept for 2024/25 being increased by £37.26 (i.e. 8.58%) from £434.14 to £471.4, in line with the GLA's draft budget proposals;
- 2.9 notes the final Settlement Funding Assessment (SFA) figure for 2024/25 has not yet been announced and agrees to delegate authority to the Executive Director for Corporate Resources to include any change to the provisional SFA of £137,197,175 in the Budget report for Council with any difference to the position set out in this report covered from provisions and reserves as necessary;
- 2.10 notes the provisional and estimated precept and levies from the GLA and other bodies as detailed in Appendix Y6 and agrees to delegate authority to the Executive Director for Corporate Resources to include any changes once confirmed in the Budget report for Council with any difference covered from provisions and reserves as necessary;
- 2.11 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 with more detail in Appendix Y4;
- 2.12 asks that the Executive Director for Corporate Resources issues cash limits to all Directorates once the 2024/25 Revenue Budget is agreed;
- 2.13 considers, and asks Council to consider, the Section 25 Statement from the Chief Finance Officer, the Executive Director for Corporate Resources. This is attached at Appendix Y5;
- 2.14 agrees and asks Council to agree the draft statutory calculations for 2024/25 as set out at Appendix Y6;
- 2.15 notes and asks Council to note the prospects for the revenue budget for 2024/25 and future years as set out in Sections 6 and 7;
- 2.16 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)**

- 2.17 notes and asks Council to note the adjustments to and impact of various specific grants for 2024/25 on the General Fund as set out in section 6 of this report;

#### **Fees and Charges**

- 2.18 approves the approach to setting 2024/25 fees and charges for chargeable services in section 6 of the report and attached at Appendix Y8;

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## **Dedicated Schools Grant and Pupil Premium**

### Schools Block

- 2.19 note and recommends that Council notes the provisional gross Dedicated Schools Grant (DSG) allocation of £363.126m before the Department's adjustments to fund Academy schools;
- 2.20 notes and recommends that Council notes the provisional DSG allocation for £240.662m be the Schools' Budget (Schools Block) for 2024/25 covering both maintained schools and academies, and that this includes £7.5m of funding that schools currently receive via the Mainstream Additional Grant;
- 2.21 notes an increase in pupil unit funding for primary of £39 and secondary of £139 and that this also incorporates the Mainstream Additional Grant as mentioned above. However, there has been an overall reduction in primary age pupil by 351, partially off-set by an increase in secondary school numbers of 100;
- 2.22 notes that following the Schools Forum meeting on the 18 January 2024, submission has been made to the Department for Education recommending the application of the National Funding Formula (including unit values) allowing for a 0% uplift in Minimum Funding Guarantee (MFG);
- 2.23 agrees and recommends that Council agrees, as recommended by Schools Forum, the once-off transfer of circa £0.7m of Schools Block funding to the High Needs Block;

### Central Schools Services Block (CSSB)

- 2.24 notes, and asks Council to note, the construct and allocation of £3.014m for the CSSB block allocation for 2024/25, a reduction of circa £0.295m from the £3.309m 2023/24 allocation;

### High Needs Block (HNB)

- 2.25 notes, and asks Council to note, the provisional HNB £79.225m to support the Council's statutory duty with regards to Special Education Needs (SEN), a net increase of £2.373m relative to 2023/24. And that the HNB will be finalised in March for deductions arising for institutions funded by the Education and Skills Funding Agency (ESFA);
- 2.26 notes that the HNB is expected to overspend by £3m in 2023/24, increasing the cumulative overspend to circa £14m in total when prior year overspends are included based on the national accounting override issued by the Department of Education (DfE) and as part of which Lewisham is progressing a mitigation plan as part of the Delivering Better Value initiative (Phase 3);

### Early Years Block (EYB)

- 2.27 notes, and asks Council to note, the Dedicated Schools Grant allocation to the EYB of £40.225m;
- 2.28 notes, and asks Council to note that the Department for Education has increased hourly funding for 3 and 4 year olds from £6.33 to £7.24 (14.4%) and with respect to 2 year old disadvantaged funding, the hourly rate has increased from £7.52 to £10.64 (41.5%);
- 2.29 notes, and asks Council to note, the introduction of new funding from 1 April 2024 for 2 year old working parent entitlement of £10.64 per hour and new funding for under 2 year olds from 1 September 2024 at £14.52 per hour;
- 2.30 notes that the maintained nursery supplementary funding allocation for 2024/25 is subject to change but is expected to increase by circa £89k, subject to movement in pupil numbers;

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## Pupil Premium

- 2.31 notes, and asks Council to note, that the pupil premium will continue in 2024/25, that the per-pupil funding is expected to increase by 1% for primary and 2% for secondary, with the total quantum confirmed in summer 2024;

## Housing Revenue Account

- 2.32 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 2 November 2023, as attached at Appendix X2a and X2b;

- 2.33 notes, and asks Council to note, the consultation report on proposed service charge increases to tenants and leaseholders presented to the remaining tenants and leaseholders on 13 November 2023 as attached at Appendix X3.

- 2.34 agrees, and asks Council to agree, to set an increase in dwelling rents of 7.7% (an average of £8.57 per week) – as per the Governments formula rent increases to be applied to rents for 2024/25 and as outlined in section 9 of this report;

- 2.35 agrees, and asks Council to agree, to set an increase in the hostels accommodation charge by 7.7% (or £3.10 per week), in accordance with Governments direction for formula rent increases to be applied to rents for 2024/25;

- 2.36 approves, and asks Council to approve, the following average weekly increases/decreases for dwellings for:

- 2.36.1 service charges to PFI managed dwellings (Brockley) to ensure full cost recovery and 9.9% inflationary uplift for 2024/25;

• caretaking	9.9%	(£0.35)
• grounds	9.9%	(£0.21)
• communal lighting	9.9%	(£0.01)
• bulk waste collection	9.9%	(£0.15)
• window cleaning	9.9%	(£0.00)
• tenants' levy	0.00%	(£0.00)

- 2.36.2 service charges to Council managed dwellings:

• caretaking	7.70%	(£0.59)
• grounds	7.70%	(£0.10)
• window cleaning	7.70%	(£0.03)
• communal lighting	7.70%	(£0.10)
• block pest control	7.00%	(£1.80)
• waste collection	7.70%	(£0.07)
• heating & hot water	7.70%	(£1.23)
• tenants' levy	0.00%	(£0.00)
• bulk waste disposal	7.70%	(£0.05)
• sheltered housing	0.00%	(£0.00)

- 2.36.3 approves, and asks Council to approve, the following average weekly percentage changes for hostels and shared temporary units for;

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- service charges (hostels) – caretaking etc.; 7.70% or £5.92pw energy cost increases for heat, light & power; 10.0% or £0.71pw;
  - water charges increase; 7.70% or £0.02pw;
- 2.36.4 approves, and asks Council to approve, an increase in garage rents by 8.90% (£1.58 per week) for Brockley PFI and Council residents as outlined in Appendix X4;
- 2.36.5 notes, and asks Council to note, that the budgeted expenditure for the Housing Revenue Account (HRA) for 2024/25 is £224.3m, split £111.5m revenue and £112.8m capital, which includes the decent homes and new build programmes;
- 2.36.6 agrees the HRA Business Plan for 2024/25, as attached at Appendix X7;
- 2.36.7 notes the 2023/24 P8 HRA Capital Programme monitoring position and the Capital Programme potential future schemes and resources as set out in Section 11 of this report;
- 2.36.8 agrees to write-off 32 cases of Former Tenants' Arrears as set out in Appendix X5, totalling £561,449.14;

### **Treasury Management Strategy**

- 2.37 approve and recommend that Council approves the Treasury Management Strategy 2024/25 including the prudential indicators and treasury indicators;
- 2.38 approve and recommend that Council approves the Annual Investment Strategy and Creditworthiness Policy, set out in further detail at Appendix Z2;
- 2.39 approve and recommend that Council approves the Investment Strategy as set out in section 10 of this report, along with the operational boundary & authorised limit for the year as set out in tables D4 and D5 in this report;
- 2.40 approve and recommend that Council approves the Minimum Revenue Provision (MRP) policy as set out in section 10.27 of this report;
- 2.41 agrees and recommend that Council agree to delegate to the Executive Director of Corporate Resources the authority during 2024/25 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;
- 2.42 approve and recommend that Council approves the overall credit and counterparty risk management criteria, as set out at Appendix Z2, the proposed countries for investment at Appendix Z5, and that it formally delegates responsibility for managing transactions with those institutions meeting the criteria to the .

### **Capital Programme**

- 2.43 notes the capital programme position and recommends that Council approve the 2024/25 to 2027/28 Capital Programme of £558.0m as set out in section 11 of this report and Appendix W1;
- 2.44 agrees and recommends that Council agree to delegate to the Executive Director for Corporate Resources authority to amend the scheme mix within the Capital programme to respond to the risks as set out as long as this is done within the total programme parameters approved and that regular updates on the capital programme, reflecting any changes, are regularly reported back to Mayor & Cabinet.

## **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 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

### **Values**

3.3 Values are critical to the Council's role as an employer, regulator, 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 five core values:

- Ambitious;
- Inclusive;
- Collaborative;
- Accountable;
- Trustworthy.

3.4 The setting a balanced budget for 2024/25 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 2024/25 would align to the seven priorities set out above.

3.5 As noted in the 2023/24 budget, the Council's strong and resilient framework for prioritising action has served the organisation well in the face of reductions to local government spending, growth in demand for services with a growing population and increasing costs due to inflation. 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.

3.6 This joint endeavour helps work through complex challenges, such as the pressures faced by health and social care services and housing, 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.

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- 3.7 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. The Council's responses to this on-going pressure are addressed in this report; including further budget reduction proposals for 2024/25 and noting that the Autumn Statement suggested that Local Government funding from 2025/26 would be severely constrained. This is pending a long overdue reset of the Fair Funding arrangements and review of Council Tax and Business Rates as revenue raising mechanisms to fund local services.
- 3.8 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, principally for overspending services, additional significant inflationary pressures 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.
- 3.9 The cost of living crisis continues to impact our residents, businesses, and the Council alike and the proposed 2024/25 budget seeks to continue to best support the borough as a whole.

## **4. Structure Of the Report, Policy Context, And Background**

4.1 The 2024/25 Budget Report is structured as follows:

Section 1	Summary
Section 2	Recommendations
Section 3	Policy Context
Section 4	Structure of the Report
Section 5	Background
Section 6	General Fund Revenue Budget and Council Tax
Section 7	Future Years' Budget Strategy and Risks
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
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

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## 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 2023, the United Kingdom's economy was still in a period of recovery. Gross Domestic Product (GDP) growth for the for the last three months to December 2023 has been flat at around 0.6% as at December 2023. However, the growth outlook for 2024 is less positive with an expectation that the economy experiences GDP growth of 0.0% as at Q4 of 2024 based on the Bank of England forecast in November 2023.
- 5.3 The UK unemployment rate rose slightly to 4.3% in 2023, and this continues to be a pressure in terms of concerns for shortages of workers in the UK economy. Inflation rose to 11.1% in October 2022 and has now reduced to 4.0% in December 2023, but it is still above the long term target of 2%. The public sector often experiences a lag in inflation (through its retrospective agreement of inflation in contracts and wage negotiations) and it was the persistently high level of inflation which forced the Bank of England to increase interest rates to 5.25%. Based on the current Bank of England forecasts and recent escalating global uncertainties impacting trade, the expectation is that interest rates are likely to remain at or close to these levels for an extended period.
- 5.4 The cost of living crisis refers to the fall in "real" disposable incomes that the UK has experienced since the financial crash in 2008 but more acutely since late 2021. Most recently it is being caused predominantly by high inflation outstripping wage and benefit increases, and although the recent falls in inflation have helped to reduce the cost of living crisis, the situation for many persists.
- 5.5 Public debt remained high at around 101.2% of GDP in Q2 of 2023, and the intention of Government, as set out in the Chancellors Budget in March 2023 and unchanged in the Autumn Statement, is to reduce this over the next four years to 2027/28. The consequence of this, along with recent tax cuts, is a contributing factor to the expected reduction in public sector funding over this same period. With the recognition that, as an unprotected area for government spending, local government risks bearing a significant and disproportionate share of these reductions from 2025.
- 5.6 Overall, the UK economy in 2023 was slowly recovering from the global pandemic with low GDP growth rate. The challenge of the cost of living crisis, inflation above the Bank of England target, and high levels of public debt, are all issues which the UK Government and Bank of England still have to manage appropriately to reduce the risk of recession and rising unemployment. In addition, the wars in Ukraine and Gaza and uncertainty over the safety of trade routes through the Suez Canal all increase the overall risks to the UK economy.

### Local Government

- 5.7 The provisional Local Government Finance Settlement was announced on 18 December 2023, with the final settlement expected in February 2024. This is another one year only settlement pending the review of relative needs and resources (also known as the fair funding review).

- 5.8 The settlement has provided a potential increase of 6.6% in council core spending power in cash terms for Lewisham. Existing funding streams will continue including the Adult Social Care Market Sustainability and Improvement Funding and the Discharge Fund. 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 temporary accommodation and social care. The government's response to this has been to allow Councils to increase their council tax by the adult social care precept element and the overall social care grant funding.
- 5.9 Along with the settlement announcement, the Government confirmed the continuation and an increase of 2% to the Adult Social Care (SC) precept on Council Tax in 2024/25, created to give local authorities who are responsible for social care the ability to raise new funding to spend exclusively on Adult Social Care. Since 2016/17, when this was additional local tax burden flexibility was introduced, the Council has raised the SC precept. Applying the maximum precept of 2% for 2024/25 will generate an extra £2.698m of revenue for Adult Social Care services.
- 5.10 The Government also announced that the limit by which Councils can increase their core Council Tax (inclusive of levies) without a referendum, remains at a maximum level of 2.99%.
- 5.11 With 2024/25 effectively being another roll forward year with some growth on specific grants, the fundamental review of the way local government is financed has again been deferred until at least the 2026/27 financial year, and 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 as the current method is based on indices from 2013/14. Alongside this the overdue reform of the Business Rates Retention arrangements, which aims to reform the elements of the business rates retention system in England.
- 5.12 While this position is confirmed for one year only, officer's medium-term assumptions are that this recognises a higher funding baseline, including all the 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 and levelling up intentions of the government, the local government fair funding review, combined with the expectation that demand for services continues to grow, the Council fully expects to have to continue to seek savings to balance future year's budgets.
- 5.13 Last year the Council was able to set its budget without planning to use reserves. However, the 2023/24 forecast overspend position at £19.9m is such that it has been necessary to identify and implement both in year budget reduction proposals and bring forward new proposals for 2024/25. The Council has identified £7.945m of savings necessary to set a balanced budget, being £2.315m which were previously and a further £5.630m which have been identified for inclusion in the base budget for 2024/25. Even with these urgent measures, and anticipating the ongoing high levels of spending on children's social care and temporary accommodation are such that the Council is required to use reserves on a once off basis to support the setting of the budget. It was considered necessary to utilise £1.5m of reserves to support the setting of the 2024/25 budget, however the recent announcement on 24 January 2024 of additional 'top up' of Social Care grant of £500m nationally should enable the Council to utilise this on a once off basis instead of reserves.

### **Cost of Living Crisis**

- 5.14 The Cost of Living crisis is still having severe detrimental effects on households across the country, with Lewisham residents being particularly vulnerable due to their

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comparatively low income and high deprivation levels (Lewisham being ranked eighth in London and 63 nationally on the Indices of Multiple Deprivation).

- 5.15 On the 23 of November 2022, Council passed a motion to declare a Cost of Living emergency in the Borough. This called on the Government to use its powers to support people through the worst financial crisis to hit the country in decades. Following this, a programme of action was developed by Lewisham Council to support residents through the crisis by utilising existing resources, securing funding from identified sources to support delivery, and enhancing partnership work across the Borough with the voluntary community sector and anchor institutions.
- 5.16 The programme addresses the following areas in relation to the Cost of Living Crisis:
- Food justice,
  - Energy advice and fuel poverty,
  - Income maximisation,
  - Debt triage,
  - Warm Welcomes (more detail below), and
  - Communications.
- 5.17 In April 2023, Lewisham Council launched the food justice action plan in partnership with a range of local partners to combat food insecurity by:
- Reducing the risk of Lewisham residents experiencing food injustice;
  - Ensuring children and young people have access to nutritious, sustainable and culturally appropriate sources of food throughout the year;
  - Co-ordinating resources to maximise the support available to those in crisis;
  - Promoting and developing 'Money First' approaches where appropriate.
- 5.18 Since this action plan was published, almost £0.09m from the Community Food Justice Grants has been distributed to support 19 of the community food project providers in the Borough.
- 5.19 The Council has invested over £0.2m of Public Health and local area NHS funding into the food justice programme. This has helped to fund local food-giving projects such as social supermarkets and foodbanks.
- 5.20 Furthermore, during 2023/24 the Council has invested over £2.2m from the Household Support Fund to expand free school meals for all primary school children, including holiday activities, and a further £1m has been distributed to schools to contribute to feeding children via localised schemes and investment in school kitchens.
- 5.21 In line with energy advice and fuel poverty support, during 2022/23, the Council supported over 1,150 households in Lewisham and reprocured the South London fuel poverty advice service. To allow community energy partners to deliver practical support to households facing fuel poverty, the Council provided £0.3m of funding. In 2023/24 £0.2m of funding was provided for residential energy efficiency measures.
- 5.22 In line with income maximisation, Lewisham Council has supported over 1,150 residents with income gains of almost £0.5m as at December 2023.
- 5.23 In partnership with Policy in Practice, the Council have contacted over 1,200 households to increase uptake of Pension Credits of approximately £1.6m.
- 5.24 Following its success during 2022/23, Lewisham Council worked in partnership with Lewisham Local to relaunch Warm Welcomes during 2023/24. Warm Welcomes is an initiative which makes local places accessible for residents to stay warm, have some

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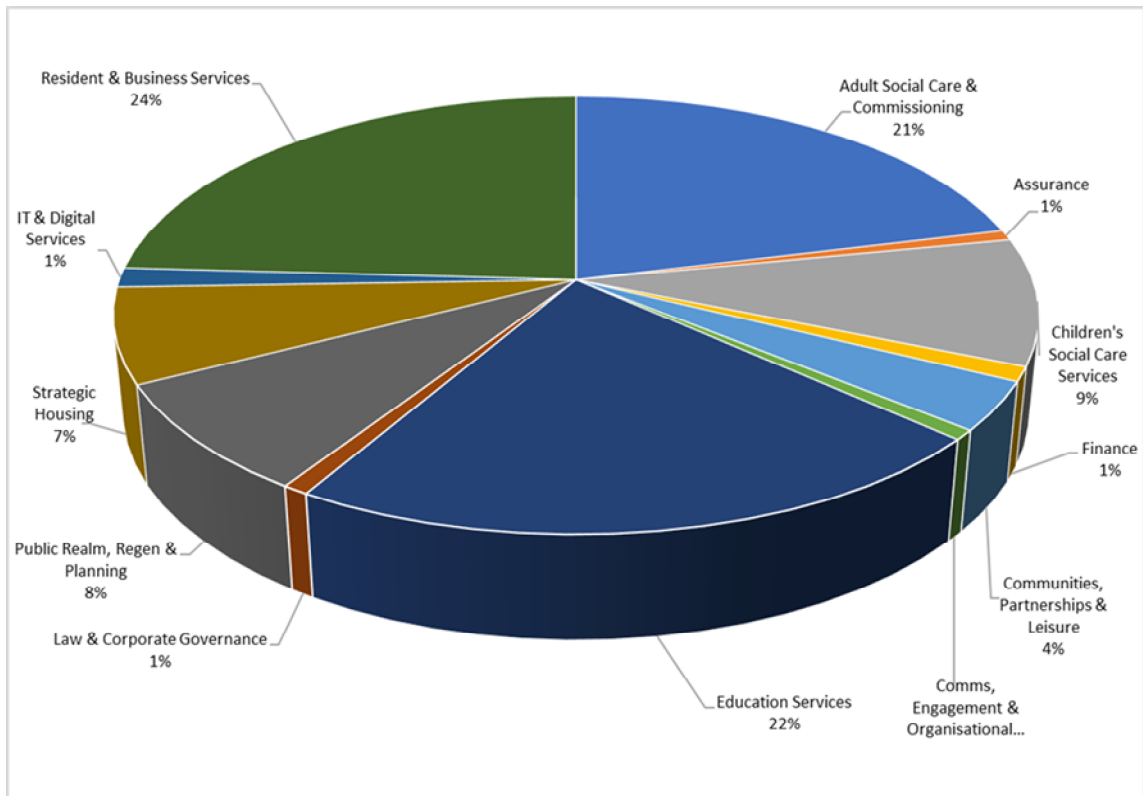
refreshments and find out about services in their area in light of the current Cost of Living crisis.

- 5.25 In collaboration with Citizens Advice Lewisham pop-up services across the Borough have been hosted on a weekly basis, to provide residents with Cost of Living support. The provision of advice outreach via Citizens Advice has also utilised funding from the Household Support Fund.
- 5.26 Lewisham Council has received four iterations of the Household Support Fund, of which the 2023/24 iteration totalled over £5.3m. The continuation of this Fund into 2024/25 has not been confirmed by central Government at this stage. If no longer provided this will negatively impact the supply of free school meals and Cost of Living payments, amongst other things.
- 5.27 The Council will also continue to support resident financially through income maximisation and debt triage to reduce the negative impact of this possible withdrawal of funding.
- 5.28 Lewisham Council has also provided support via Lewisham Works, the Council's directly delivered employment service. Through this service, the Council has already supported over 600 residents with bespoke 1:1 holistic employment and training support. This has led to 250 residents securing good work tailored to their needs, and 250 gaining new skills.
- 5.29 Councillors also resolve to continue working with partners to support local communities, particularly the most vulnerable, through the coming months, by:
- 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;
  - Driving increased social value outcomes and benefits from our supply chains and contractors via our procurement activities and practices.
- 5.30 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 for Cost of Living support can be found here: <https://lewisham.gov.uk/myservices/cost-of-living>
- 5.31 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**

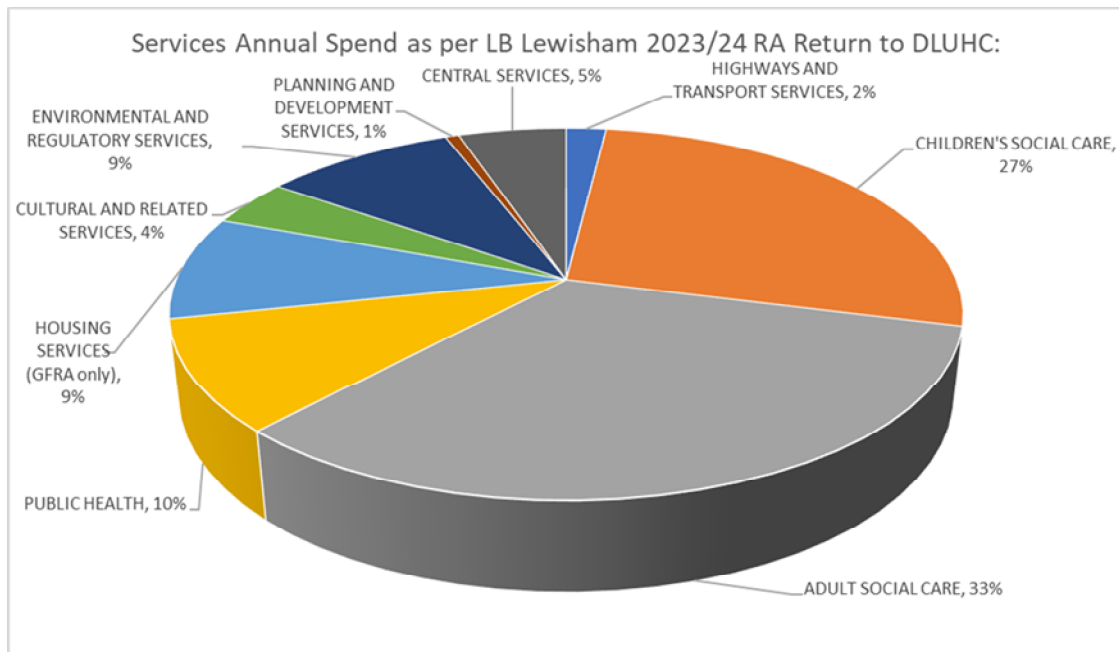
- 5.32 The Council spends over £1.32bn annually on services for residents. The gross expenditure budgets for each general fund service area (excluding the HRA) in the Council are as below:

2023/24 Gross Expenditure of £1.32bn



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

5.33 In respect of the services element of this annual spend, it is the gross spend built from the £264m general fund budget and income from grants, fees and charges, the money is directed as follows:



5.34 The Council serves a population of 300,553 people (census 2021) who live in 132,416 households. Residents of Lewisham are diverse, with 35.6% of the population born outside of the UK. The number of residents is also growing; and has grown by nearly



9% since the last census in 2011 which is higher than both the increase for London of 7.7% and the overall increase for England of 6.6%. As at the date of the most recent census, Lewisham now ranks 44<sup>th</sup> for total population out of 309 local authority areas in London, moving up one place in a decade, and is the 13<sup>th</sup> most densely populated of the 33 London boroughs. More information on the make-up of the borough can be found on the [Lewisham Observatory – Welcome to the Lewisham Observatory site](#).

- 5.35 The Council works hard to be available for residents when they need it. Through the Customer Services access point, the Council received 86,775 calls during 2022/23. In addition, through the registry office, the Council processed 8,516 births, deaths and marriages in 2022/23.
- 5.36 In addition to supporting a diverse and growing population, the budget contributes to the Council’s commitment to extend local democracy. In 2023, Lewisham Council undertook a second report as part of a series of surveys to better understand challenges facing Small to Medium Enterprises with ethnically diverse owners.
- 5.37 Lewisham continues to welcome more of those seeking asylum in the UK, including continuation of the 25% ‘sanctuary’ discount for Council Tax, which was introduced in 2023/24, 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 with Russia. In addition to specific support for refugees, the Council provided support for the cost of Council Tax to over 22,000 households.
- 5.38 The budget supports a wide range of age groups across more than 600 individual services.
- 5.39 For young people, the schools’ budget provides for 72 maintained schools from nursery level through to secondary. The Borough had the highest school attendance in inner London for primary and secondary. With 97% of pupils attending a “Good” or “Outstanding” school. Furthermore, the Council ran over 40 holiday programme days with free activities and lunches for school children and young people aged 4 to 16.
- 5.40 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 residents. As at the end of 2022/23, Lewisham Council were landlords of 11,953 general needs accommodation households, 484 sheltered accommodation households and 2,718 temporary accommodation households (including partnership placements). The Council made 1,045 social lets to households on the housing register in 2022/23. However, the number of individuals in temporary accommodation continues to rise, specifically in nightly paid services, partially due to the ongoing cost of living crisis. During 2022/23, work-on-site commenced for 328 social housing dwellings.
- 5.41 The Borough has over 11,500 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. During 2022/23, the Council supported 66 apprentices to undertake work and help another 37 employees upskill.
- 5.42 The Adult Social Care service provides a range of support to vulnerable users that helps them remain active and independent, with 1,461 older and vulnerable residents being supported to return to everyday life following a hospital stay during 2022/23. The service undertook 6,822 adult social care assessments and reviews and supported 3,558 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 national Social Care reforms which are in part being delayed will impact how we deliver services to resident. The provisional Local Government Finance Settlement includes further funding towards the implementation

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of these changes in 2024/25, although more will be required in future years as the full impact of the new legislation is understood and quantified.

- 5.43 The budget also maintains key universal services such as libraries, arts and entertainment centres and sports and recreation facilities. In 2022/23 the Council had 976,649 library visits and 1,332,539 leisure centre visits.
- 5.44 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 2022/23 the service collected 85,392 tonnes of household waste of which 19,367 tonnes of recycling was recycled, composted, or sent for reuse. The service also made 227,760 commercial bin and sack collections.
- 5.45 The Council is responsible for maintaining roads and footpaths within the Borough. During 2022/23, the Council delivered eight new school streets, 23 new cycle hangars and 35 new electric vehicle charging points. Lewisham Council also manages the parking service, including permits and enforcement, and within 2022/23 74,670 parking permits were approved. These are service areas which will play a significant part in supporting the delivery of a zero-carbon borough.
- 5.46 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 48 parks in the borough of which 23 parks (and green spaces) hold the coveted 'Green Flag' rating.
- 5.47 In 2023, the Council adopted the first Affordable Workspace Strategy for Lewisham, with a focus on the creative sector along with other key growth areas. We provided over £2.3m in grant funding to the expansion of Cockpit Arts, which opened in December 2023. This delivered over 15,000 sq ft of new and refurbished workspace for creatives.
- 5.48 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 2024/25;
  - Council Tax level for 2024/25;
  - Other Grants for 2024/25;
  - Dedicated Schools Grant (DSG) for 2024/25;
  - Housing Revenue Account (HRA) and level of rents for 2024/25;
  - Treasury Management Strategy for 2024/25; and
  - Capital Programme for 2024/25 to 2027/28.

## 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 2024/25, assuming a Council Tax increase of 4.99%, is £293.838m. Further details of the budget reduction measures included for 2024/25 are provided at Appendices Y1 and Y2.
- 6.2. It is structured as follows:
- Update on 2023/24 Revenue Budget;
  - The Budget Model, including:
    - Settlement Funding Assessment; Council Tax, Grants, and Budget Reduction Proposals;

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- Budget Pressures to fund;
- Overall Budget Position for 2024/25.

### **Update on 2023/24 Revenue Budget**

- 6.3. The Council's revenue budget for 2023/24 was agreed at Council on 1 March 2023. The general fund budget requirement was set at £263.680m.
- 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 are presented monthly to the Executive Management Team (EMT) and 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 November (period 8) budget monitoring report was reported to Mayor and Cabinet in January 2024. This report presented a pressure of £19.9m on General Fund budgets after the commitment of £11.5m from corporate provisions and reserves.,

### **Directorates**

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

**Table A1: Forecast outturn for 2023/24 as at end of November 2023**

General Fund	Net Budget 2023/24	Forecast Outturn 2023/24	Period 8 Forecast Variance 2023/24
	£m	£m	£m
Children & Young People	75.2	92.2	17.0
Community Services	85.6	88.7	3.2
Housing	.4	18.3	9.9
Place	19.4	20.2	0.8
Corporate Resources	38.0	35.9	(2.1)
Chief Executives	11.2	12.4	1.2
Salary Pay Award	0.0	1.5	1.5
<b>Directorate Totals</b>	<b>237.7</b>	<b>269.2</b>	<b>31.4</b>
Corporate Provisions and Reserves	0.0	(11.5)	(11.5)
Corporate Items	26.0	26.0	0.0
<b>Corporate Budget Totals</b>	<b>26.0</b>	<b>14.5</b>	<b>(11.5)</b>
<b>General Fund Totals</b>	<b>263.7</b>	<b>283.7</b>	<b>19.9</b>

- 6.8. The paragraph below explains the reported position at Period 8 in summary. The full detail is as reported to Mayor and Cabinet on the 24 January:

#### Children and Young People - £17.0m Pressure

- 6.9. *Children's Social Care*: The Projected overspend for Children's Social care in 2023/24 is £14.1m, an adverse movement of £5m since Period 4. This adverse movement is mainly due to an increase in spend on care placements (£10.8m). The number of high-

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cost children, with these children having longer stays than previously anticipated due to challenges moving them into suitable lower cost placements and the impact of a net increase in care being provided to other children looked after. Other smaller elements of the overspend include salary costs (£1.5m over) and various such as s17 and No Recourse to Public Funds payments (£31.8m over).

- 6.10. The Directorate continues to develop stronger prevention services and work towards more intervention and support strategies.
- 6.11. *Education Services*: The Projected overspend for Education services in Period 8 is £3.7m, an adverse movement of £0.9m since Period 4, due primarily to the level of demand on home to school transport and children with complex needs.
- 6.12. *Families, Qualities and Commissioning*: The projected underspend for Family, Quality and Commissioning for 2023/24 is £0.8m, an improvement of £0.3m on the Period 4 position due to mitigating actions taken by the service. The service is currently undergoing a period of transition and transformation as it works towards an intervention and support model, making best use of government grants, such as the Supporting Families Grant and funding from Public Health and the Integrated Care Board (formally CCG).

#### Community Services - £3.2m Adverse

- 6.13. *Adult Social Care and Commissioning*: There is a £3.5m forecast overspend at Period 8, an adverse movement of £2.5m since Period 4. The adverse movement is due to increases in the number of Learning Disabilities transition clients from Children's Social care, which are now reflected in the forecast. There is also an increase in Learning Disabilities supported accommodation costs for revised care packages and some higher spend on agency staff than anticipated to manage the hospital discharge process.
- 6.14. This position is after the commitment of some once off resources set aside corporately in the 23/24 budget for the impact of Fair Cost of Care reform. Reliance on these once off contributions must be addressed through savings in the 24/25 service plan, including delivery of the committed savings plans.
- 6.15. *Communities Partnerships & Leisure*: An underspend of £0.3m is expected within the service due to additional income across the service and a reduction in the general fund subsidy to the Adult Lewisham Learning Service.

#### Place - £0.8m Adverse

- 6.16. *Public Realm*: A balanced position is reported on the Division, an overall improvement of £1m since Period 4. Pressures remain on service areas such as Street Environmental Services due to operational costs in refuse collection. These are being offset in year by income overachievements and in-year once-off cost reduction measures within the Division.
- 6.17. *Planning*: There is a £0.6m pressure on the Planning division, which continue to experience staffing pressures and national delay in setting new planning application fees. Building Control are forecasting a £0.2m overspend due to a reduction in income levels.
- 6.18. *Regeneration*: £0.2m overspend due to unachieved income generation savings.

#### Housing - £9.9m Adverse

- 6.19. *Strategic Housing*: £9.9m pressure reported at Period 8, a £0.9m adverse movement since Period 4. At November 2023 there are 1,181 people in nightly paid services compared to 764 in April 2021 and 985 in April 2022. In addition, people are staying longer in Temporary Accommodation (TA) as the service is unable to move them out due to the lack of suitable alternative accommodation. The specific pressures were

presented in more detail in the Period 8 report to Mayor and Cabinet of the 24 January.

- 6.20. As well as the demand and supply pressures, they include the impact of the Housing Benefit limitation recharge, income arrears in the current economic environment, and the cost of repairs and incentive payments to help prevent homelessness. Various mitigations are being pursued to bring down these pressures, including incentives and acquisition of additional properties to meet the demand.

#### Corporate Resources - £2.1m Favourable

- 6.21. *Resident and Business Services*: £1m underspend due to the reduction in supported accommodation costs and additional income from debt collection activities.
- 6.22. *IT and Digital Services*: £0.3m underspend due primarily to vacancies being held within the team where recruitment continues to prove challenging.
- 6.23. *Finance and Assurance*: are broadly balanced.
- 6.24. *Concessionary Fares*: £0.7m underspend in respect of the payments due to the Greater London Authority (GLA) for those people travelling on public transport who are eligible for free or discounted travel. These costs are expected to rise in 2024/25 with fare increases and as demand continues to recover post pandemic.

#### Chief Executive - £1.1m Adverse

- 6.25. *Law and Governance*: £1.4m overspend based on a £1.8m pressure in Legal Services due to agency and external expenditure to deliver Social Care legal work (challenges recruiting in this area) and the level of workload. There are also cost pressures on property work as well as the more complex Capital development schemes, this includes disputes, contract drafting, advice on grants/structuring/tax VAT/grant regimes. Partially mitigated by a £0.4m underspend due to vacancies within Policy and Information Governance teams.
- 6.26. *People & Organisational Development and Communications and Engagement*: £0.3m underspend due to vacancies across the services, held to mitigate some of the Council's financial pressure.

#### Corporate Provisions and Reserves - £11.5m Adverse

- 6.27. Corporate Provisions are budgets held centrally for corporate purposes and 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 strain and voluntary severance.
- 6.28. It is planned that Corporate Provisions and Reserves will contribute £11.5m of funding to support the Council's inflationary pressures and to support service risks released against the overspend in line with the previously agreed budget reduction measures to reduce the forecast overspend.
- 6.29. Given that the forecast outturn position is a £19.9m overspend (after the planned use of provisions and reserves) the funding of this will fall to the remaining provisions budgets (if available) and then reserves, with the final position declared in the outturn report to Members.

#### The Budget Model

- 6.30. This section of the report sets out the construction of the 2024/25 base budget. This section is structured as follows:
- Budget assumptions, including:
    - Settlement Funding Assessment,

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- Council Tax,
  - Grants, and
  - Budget Reductions.
- Budget pressures to be funded.
- 6.31. The Council has made substantial reductions to its expenditure over the last thirteen years. Subject to the outcome of the future 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 (see section 7). This section of the report summarises a series of proposals that would enable the Council to set a balanced budget for 2024/25 as part of a sustainable financial strategy to 2027/28.

### **Settlement Funding Assessment (SFA)**

- 6.32. The provisional Local Government Finance Settlement of the 18 December 2023 confirmed the level of funding available to the Council for 2024/25, consisting of the Council's share of the Revenue Support Grant (RSG) and its Baseline Funding Level (BFL); collectively the Settlement Funding Assessment (SFA).
- 6.33. Pending the Fair Funding review, 2024/25 has effectively been a roll forward of 2023/24, with no amendments to the funding formula or approach. The RSG has been uplifted in-line with September 2023 Consumer Price Index (CPI) inflation of 6.7%. The approach to setting the BFL has also remained consistent with the small business rate multiplier again frozen for 2024/25 whilst the standard multiplier will increase with CPI. Local authorities are compensated for the income shortfall for the under indexation of the multiplier for the small business rate multiplier via the section 31 grant.
- 6.34. In addition to this compensation, Local Authorities have continued to receive section 31 grant to compensate for the previous change to uplifting the multiplier by the typically lower CPI rather than Retail Price Index (RPI). Whilst this change is not new, the recent high levels of inflation, coupled with the differential between RPI and CPI, has meant that the level of the s31 grant has grown substantially over the previous two years. The Council had not previously built this grant into base budget, holding it back as a contingency for in-year overspends. A change to this strategy was signalled in the July 2023 Medium term Financial Strategy (MTFS). This was to recognise the levels of service spending pressure requiring funding coupled with continuing significant overspends in-year. It is appropriate that £15m of this grant be injected when setting the base budget for 2024/25. This further increases the Council's reliance on Government grants which remain at risk of substantial change through the long awaited Fair Funding Review.
- 6.35. The percentage combined increase in the SFA for 2024/25 is 4.65%. The total increase is £6.091m for 2024/25 and brings the overall SFA level to £137.197m. This and the £15m of section 31 grant will be used to fund the base budget for 2024/25.

### **2024/25 Council Tax**

#### Collection Fund

- 6.36. 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.
- 6.37. 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 2023/24 of £2.638m.

This reflects the ongoing work of the Public Services team to carefully collect all monies owing to the Council and the prior adjustments made to the assumed collection rate given the impact of Covid-19.

- 6.38. 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, £2.043m 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 against potential future year deficits. The remaining balance of £0.595m is allocated to the GLA.

#### Council Tax Reduction Scheme

- 6.39. Members should note that the Council agreed on the 17 January 2024 that no changes are to be made to the Council Tax Reduction Scheme (CTRS) for 2024/25. Members agreed that the fixed percentage reduction in liability for the working age claimants of the scheme should remain at 75% for 2024/25. This means that everyone eligible and of working-age has to continue to pay a minimum of 25% of their council tax liability.

#### Council Tax Levels

- 6.40. Since 2016/17, the government has allowed councils with social care responsibilities to apply a percentage increase on council tax (the Adult Social Care precept). The additional income being 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 2024/25 of 2%. For 2024/25 this will generate £2.698m of additional income for ASC services.
- 6.41. This report proposes that Mayor and Cabinet approves and recommends that Council approve the 2% ASC precept for 2024/25 to obtain the maximum benefit permitted. 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.
- 6.42. The provisional Local Government Finance Settlement announced on the 18 December 2023 confirmed the intention for a core referendum principle of up to 3% (previously 2%) in 2024/25, as announced at the Autumn Statement on the 22 November 2023. This is in addition to the flexibility to raise the Adult Social Care Precept set out above.
- 6.43. The government's assumptions in the local government finance settlement 2024/25 include the raising of both Council Tax and the Adult Social Care precept in each and every year to meet the recognised funding pressures faced by the sector. This increase in core Council Tax of 2.99% (i.e. within the limit of the 3% referendum threshold) would provide additional funding of approximately £4.0346m.
- 6.44. 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 2024/25 and their general responsibilities to steward the Council's finances over the medium term.
- 6.45. 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 reserves in the short term and require additional cuts for the 2024/25 budget to be identified. 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.
- 6.46. In 2023/24, the Band D Council Tax in Lewisham is £1,926.27 on a base of 88,904.9 Band D equivalent properties. Of this, £434.14 relates to the activities of the GLA which the Council pays over to them on collection. Lewisham's element is £1,492.13.

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- 6.47. The GLA is consulting on a precept of £471.40 (Band D equivalent) for 2024/25, an increase of £37.26 or 8.58%, and a final decision is expected on or after the 22 February 2024.
- 6.48. For 2024/25, the Band D Council Tax in Lewisham is recommended to be £2,037.98 on a base of 90,414.0 Band D equivalent properties (the base was approved by Council on the 17 January 2024). Of this, £471.40 relates to the activities of the GLA which the Council will pay over to them on collection, an 8.58% increase. Lewisham's element will be £1,566.58, which includes a 2024/25 increase of £74.45 (4.99%).
- 6.49. Table A2 below shows, for illustrative purposes, the Council Tax payable by a Lewisham resident in a Band D property in 2024/25 under a range of possible Council Tax increases, and the financial implications of this for the Council. A Council Tax Ready Reckoner is also attached at Appendix Y4.
- 6.50. The starting point is for an assumed 4.99% increase in Lewisham's Council Tax for 2024/25, 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 2024/25 and the budget gap in future years.

**Table A2: Band D Council Tax Levels for 2024/25**

Amounts Payable by Residents - Band D					
Uplift in Lewisham Council Tax	Lewisham Element (inc. Precept)	GLA Element	Total Council Tax	Increase in Total Council Tax vs. 2023/24	Lewisham Annual Income Forgone vs. 4.99% Uplift
	£	£	£	%	£m
4.99% increase	1,566.58	471.40	2,037.98	5.80	-
3.99% increase	1,551.67	471.40	2,023.07	5.03	(1.35)
2.99% increase	1,536.74	471.40	2,008.14	4.25	(2.70)
1.99% increase	1,521.82	471.40	1,993.22	3.48	(4.05)
1.00% increase	1,507.05	471.40	1,978.45	2.71	(5.38)
0.50% increase	1,499.59	471.40	1,970.99	2.32	(6.06)
Council Tax Freeze	1,492.13	471.40	1,963.53	1.93	(6.73)

#### Levies

- 6.51. 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 assuming no change from the final 2023/24 values. The details of these levies are provided in Appendix Y6.

#### **2024/25 Grants**

- 6.52. This section of the report considers the other funding streams which the Council currently receives and relies on for 2024/25 and 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 additional pressure on the General Fund.
- 6.53. 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 2024/25;
- Discharge Fund;
- Public Health Grant 2024/25;
- Social Care Grant;
- Market Sustainability and Improvement Fund; and
- Services Grant.

#### New Homes Bonus

- 6.54. 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 Department for Levelling Up, Housing and Communities (DLUHC) pays 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 in line with local community wishes'.
- 6.55. In the provisional Local Government Finance Settlement statement, the Secretary of State announced that for 2024/25 the NHB would continue for one more year but without legacy payments.
- 6.56. The provisional allocation for 2024/25 in Lewisham is £1.993m, this is a significant increase on the £0.114mm received in 2023/24. Given the uncertain nature of this funding, or indeed the grant, the NHB is treated in the Budget as one off monies to be used to support both temporary accommodation and childrens' social care above the growth built into base, but not recurring spend, while the necessary savings are identified, agreed and implemented.

#### Better Care Fund and improved Better Care Fund

- 6.57. 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.
- 6.58. For Lewisham the value of the BCF in 2024/25 has not yet been announced although it is expected that this may increase by approximately 5%, or circa £600k more than the 2023/24 funding of £27,442m. The local plan must be agreed with the Integrated Care Board (ICB) which replaces the Lewisham Clinical Commissioning Group (CCG) and will require the approval of NHS England.
- 6.59. 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 will 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 2024/25.
- 6.60. In 2017/18, the government also introduced the improved Better Care Fund (iBCF) to work alongside the BCF. The iBCF in 2023/24 was £14.941m and this grant has not

been increased for 2024/25. It is intended to fund adult social care activity. Plans for its use in 2024/25 will also require the agreement of the local ICB. The grant is likely to be spent in substantially the same way as in 2023/24.

#### Discharge Fund

- 6.61. The provisional Local Government Finance Settlement contained a grant that was first provided in 2023/24, the Discharge Fund, ring fenced for ASC and intended to support capacity and discharge. This grant allocation for 2024/25 is £3.491m but is generally a like-for-like replacement of previous funding made available from the ICB for discharge pressures and is therefore passed to ASC in 2024/25 to meet the existing service commitment.

#### Public Health Grant

- 6.62. In 2023/24 the Council's allocation for Public Health Grant is £26.9m, there has not yet been an announcement of the allocation for 2024/25, although it is expected that this may be as little as c£400k (less than 2%), which would be half of the increase in 2023/24 and significantly below inflation.
- 6.63. 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

- 6.64. The provisional Local Government finance settlement in December 2023 committed £1.506bn more for Social Care grant nationally for 2024/25. This has increased Lewisham's grant from £23.4m in 2023/24 to £27.9m in 2024/25 (a 19% increase on top of a 60% increase last year). This grant comes with the discretion to spend it on both adults and children social care, although Government has since indicated that they expect c70% of the grant be used for ASC. The Budget proposes that the increase be used in 2024/25 to fund pressures within both Children's and Adults Social Care, including salary and non-salary inflation pressures, maintaining the 70% allocation to ASC.
- 6.65. On 24 January 2024 government announced an additional £500m nationally of funding for councils with responsibility for adults and children's social care, distributed through the Social Care Grant. The allocation of this will be made in the Budget on the 6 March 2024. This additional funding will replace the £1.5m planned once off use of reserves in 2024/25.
- 6.66. The detail is set out in the allocation of resources to pressures later in this section.

#### Market Sustainability and Improvement Fund (MSIF)

- 6.67. 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 be 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 2023/24 this was a grant allocation of £3.203m. This funding was ring-fenced for Adult Social Care pressures arising from the implementation of the reforms to support the care market.
- 6.68. While the ASC funding reforms have been pushed back to October 2025, the existing 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 has been distributed using the ASC relative needs formula, and for Lewisham this equates to £5.984m of funding, or £2.781m of new funding. However, the settlement has also rolled in the previous MSIF Workforce Fund, which reduces the net growth. The government expects this 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. There are reporting requirements against these objectives.

### Services Grant

- 6.69. 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 was a one-off funding source and will not be taken into consideration for transitional protection or as part of core funding when the Fair Funding Review takes place. 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 being carried. Whilst there has been a third year allocation of this grant, it has significantly reduced to £0.6m for 2024/25 (down from £3.7m in 2023/24). Again the Council will not rely on this grant for ongoing budget funding and will utilise it to support one off pressures funding for temporary accommodation and childrens' social care as set out in this section.

### **2024/25 Budget Reduction Proposals**

- 6.70. In previous years various budget reduction measures for 2024/25 were agreed in December 2020, February 2021 and February 2022 by Mayor and Cabinet and these total £2.315m. These proposals included both Executive and non-Executive decisions and a summary of these cuts is attached as Appendix Y1 to this report.
- 6.71. The Council published its Medium Term Financial Strategy (MTFS) on the 19 July 2023, utilising assumptions available at that time to forecast what the likely funding shortfall would be for the period 2024/25 – 2027/28. This analysis produced a cumulative budget gap over the four year period of circa £15m, but with no budget gap requiring new savings in 2024/25.
- 6.72. That position was updated and revised over the Summer, notably to reflect increased service pressures in childrens' and adults social care and temporary accommodation, as well as more stubborn than expected inflation. This culminated in a revised MTFS going to Public Accounts Select Committee in November 2023.
- 6.73. Given the increased costs seen in the overspending position, and the lack of expectation that Government would provide new or additional funding based on the Autumn Statement (and now confirmed in the provisional Local Government Finance Settlement), officers began the process to identify measures to reduce both the 2023/24 overspend and the resultant 2024/25 pressures requiring funding.
- 6.74. This process identified proposals totalling £7.523m for 2024/25. As part of this officers were also asked to provide a 'deliverability confidence' factor for each proposal. This reflected the potential risk to achieving the reduction in full, and in part mitigates the future risk of non-delivery of the initiative. After applying the deliverability factor the net savings figure is £6.305m for 2024/25. In addition, there were a number of items which were either capital savings or once off, which were excluded for base budget setting purposes, meaning that the figure utilised for the 2024/25 budget is £5.630m. This builds on the £2.315m of initiatives identified and approved in 2021/22 and 2022/23 for delivery in 2024/25.
- 6.75. Of the proposals put forward, £1.108m (£877m net) require Mayor and Cabinet approval and £7.315m (£5.428m net) are officer decisions for implementation. The proposals which require Mayor and Cabinet approval will be brought forward as required under the Council's Constitution, with many of these relating to the generation of income and therefore contained in the fees and charges report in Appendix Y8. These proposals are set out in detail in Appendices Y2a and Y2b.
- 6.76. These total net budget reduction measures of £7.945m (the £2.315m previously agreed and the £5.630m net new) have been included in the 2024/25 budget calculation. They

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must be achieved in order to maintain a balanced budget and manage the established 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.

### **Budget Pressures to be Funded**

#### 2023/24

- 6.77. In 2023/24, the funds set aside in the budget model to meet specific identified budget pressures and potential budget risks was £25.131m. This was supplemented by £10.102m of additional Social Care grant uplift, the £2.280m of the new Market Sustainability and Fair Cost of Care Fund grant and the ASC precept of £2.525m. Furthermore, the £0.114m of New Homes Bonus and £3.696m of Service Grant was utilised for once off pressures, totalling pressures and identified risks funding of £43.848m in 2023/24.

#### 2024/25

- 6.78. The MTFS presented to PASC in November set aside £31.01m for inflation, budget pressures and risks for 2024/25. This was based on the assumed increases in funding generated from the SFA, Council Tax and the £15m of section 31 grant supported by assumed budget reduction measures to further increase capacity to fund pressures. Following the announcement of the provisional Local Government Finance Settlement, and the finalisation of the budget reduction proposals, this level of funding has been revised to £35.405m, principally through the inflation allocated in the SFA.
- 6.79. To this it is recommended that the £1.950m of the £3.852m of additional social care grant which was received for 2022/23 but not taken into base budget, plus the £4.539m of additional social care grant for 2024/25 be used to address current pressures. It is also recommended that the £2.781m of growth in the ASC Market Sustainability and Improvement Fund (further netted off for the rolling in of the MSIF Workforce Fund) be included, though ring-fenced to ASC. In addition the uplift in the Discharge Fund of £1.397m will also be ring-fenced to ASC. These actions will provide £10.667m of funding for social care base budgets, with the risk remains that in the event that these are reduced or withdrawn in future years then additional pressures will fall directly onto the Council's service budgets via a greater call on Council Tax or the SFA.
- 6.80. To the funding of these pressures can be added the NHB of £1.993m, and a third year, although significantly reduced, allocation of the Services Grant of £0.604m for 2024/25. These can only fund once off pressures given the temporary nature of these grants.
- 6.81. Furthermore, when reviewing the 2023/24 forecast outturn overspend of £19.9m (after the planned application of £11.5m of provisions and reserves) and the assumption that these are established and to some extent systemic pressures, predominantly in childrens' social care and temporary accommodation, it is considered prudent to recognise this further Budget growth and allocate £1.5m of reserves on a once off basis to support setting a balanced budget in 2024/25. Early action will need to be taken during 2024/25 to identify measures to reduce the Council's reliance on reserves and ensure that this temporary funding will not be required again in 2025/26. The late announcement on 24 January 2024 of an additional £500m nationally of 'top up' Social Care grant should enable this to be substituted for reserves on a once off basis instead for 2024/25.
- 6.82. In terms of accounting for these elements of growth in the Budget, 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 £2.698m from the Adult Social Care precept to the relevant Directorates when determining their cash limits for 2024/25. These will be set out in the Budget book to be published before the start of the financial year.

- 6.83. Using cash budgets (in particular grants such as the Social Care Grant and ASC Market Sustainability and Improvement Fund) presents a structural risk for future years, although the medium planning assumptions are that this level of funding for 2024/25 from government is in recognition of the continuing funding pressures faced by local authorities and will effectively have to form part of any future baseline funding assessment.
- 6.84. The budget pressures anticipated in 2024/25 have been reviewed and it is recommended that the following identified pressures are funded now, set against the Corporate Strategy priorities. Table A3 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 A3: Summary of 2024/25 budget pressures to be Funded**

Description	£'000	£'000
Adult Social Care precept	2,698	2,698
<u>Ongoing</u>		
Inflation, Risk & Pressures budget available in 2024/25	35,405	
ASC Market Sustainability and Improvement Fund (net)	2,781	
2022/23 Social care grant uplift (taken in arrears)	1,950	
2024/25 Social care grant uplift (additional)	4,539	
2024/25 Discharge Fund (additional)	1,397	
		46,072
<u>Once-off</u>		
New Homes Bonus	1,993	
Services Grant	606	
Reserves*	1,500	
		4,099
<b>Total Resources Available for Risks and Pressures in 2024/25</b>		<b>52,869</b>
<b>Recommended Allocations</b>		
<b>Corporate Strategy priorities</b>		
Quality Housing	-10,993	
Children and Young People	-17,028	
Health and Wellbeing	-10,781	
<b>Total Corporate Strategy priorities</b>		<b>-39,302</b>
<b>Organisational value for money</b>		
Corporate Services		-2,006
Technology and Audit		

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<b>Salary inflation for 2024/25</b>		<b>-5,816</b>
<b>Salary uplift shortfall for 2023/24</b>		<b>-1,844</b>
<b>Non-pay inflation for 2024/25</b>		<b>-4,401</b>
<b>Grand Total Funded Pressures</b>		<b>-52,869</b>

\* On 24 January 2024 government announced an additional £500m nationally of funding for councils with responsibility for adults and children's social care, distributed through the Social Care Grant. The allocation of this will be made in the Budget on the 6 March 2024. This additional funding will replace the £1.5m planned once off use of reserves in 2024/25.

#### Temporary Accommodation (-£9.993m)

- 6.85. The costs and demand for temporary accommodation have increased significantly during 2023/24, growing beyond the £3.5m of budget growth allocated in 2023/24. This pressure is three fold in that the number of people in nightly paid accommodation has grown (from 764 in April 2021 to 985 in April 2022 to now 1,181 in November 2023). People are also staying longer in temporary accommodation as the service is unable to move them out due to the lack of suitable alternative accommodation and there is 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 not covered through the Department for Work and Pensions (DWP) Housing Benefit claim.
- 6.86. This is a recognised national pressure and there is therefore competition across London which further exacerbates this issue. Whilst there are a number of actions which the service are taking to reduce and minimise the budget pressure, given the persistent and systemic nature of this pressure it is prudent to ensure that this is fully funded in 2024/25. To note, the £1.993m of New Homes Bonus has been allocated to this pressure on a once off basis and will not be built into base budget and therefore action will need to be taken in 2024/25 to address this to ensure that the 2025/26 budget setting process is not reliant on this temporary funding.

#### Corporate Support for Delivery of Quality Housing (-£1.000m)

- 6.87. The Council's commitment to both the delivery of new housing supply in the borough and the necessary investment in its existing housing stock is both ambitious and necessary. The capital programme as set out in section 11 provides the detail of the level of investment and the funding sources for this. Whilst much of the programme can be funded via the use of grants and receipts, there is a large proportion of this which will be funded via the use of borrowing. This borrowing will have a revenue impact in terms of both the direct cost of borrowing (interest and principal repayment) as well as the requirement under the regulations to make a Minimum Revenue Provision (see section 10 for more detail). These will collectively increase the annual revenue costs to the Council and thus pressure funding must be allocated corporately to meet this.

#### Children and Young People (-£17.028m)

- 6.88. The funding provided to Children and Young People is intended to fund the established overspends in both children's social care and general fund education services.
- 6.89. In children's social care the main cost pressure is in placements. The placements pressure in 2022/23 was £4.4m, the increase since then (despite the number of children supported being relatively stable) is due to the cost per child, as the children receiving support have higher levels of need. A major problem is finding appropriate placements due to challenges in the national residential market as identified in last

year's national review of Children's Social Care. As a consequence more bespoke placements have had to be created which can be very expensive. One of the key drivers for cost is staff ratios, negotiations with providers often lead to the provider mandating much higher staffing levels than we would recommend in order for them to accept the placement.

- 6.90. The directorate have been working towards more intervention and support strategies, this involves improved commissioning work with the PAN London Commissioning Alliance to secure more favourable rates and work undertaken to create alternative capacity such as the Amersham and Northover in house provision as well as further support offered to parents and young people. Further opportunities similar to this are being sought, however these are medium to long term solutions.
- 6.91. As these actions embed, the expectation is for a stabilisation in placement numbers and costs with a focus in the longer term of working towards a reduction in the cost base. However, there is a risk this reduction will be offset by increased costs associated with early intervention and support work including staffing and section 17 intervention such as mental health, legal etc.
- 6.92. In education services the primary persistent overspend is in the cost of home to school transport for Special Education Need (SEN) pupils, this is after £1.5m of pressures funding was included in 2023/24.
- 6.93. Whilst there are a number of actions which the service are taking to reduce and minimise the budget pressure, given the persistent and systemic nature of this pressure it is prudent to ensure that this is fully funded in 2024/25. To note, the £0.606m of Services Grant and £1.5m of reserves have been utilised to support the pressures funding and is once off in nature and therefore action will need to be taken in 2024/25 to address this to ensure that the 2025/26 budget setting process is not reliant on this temporary funding. The late announcement on 24 January 2024 of an additional £500m nationally of 'top up' Social Care grant should enable this to be substituted for reserves on a once off basis instead for 2024/25.

#### Health and Wellbeing: Concessionary Fares (-2.500m)

- 6.94. The concessionary fares budget is held within Corporate Resources but is shown on a separate line reflecting that this is not expenditure that the service can influence. The expenditure is based on the number of people travelling on public transport who are eligible for free or discounted travel and is set annually by the Greater London Authority (GLA) and payable to it. It is expected that the expenditure in 2024/25 will be £2.500m more than the budgeted level based on information provided to the Council in September 2023.

#### Health and Wellbeing: Public Health Funerals (-£0.080m)

- 6.95. Under the Public Health (Control of Diseases) Act 1984, local authorities are responsible for organising public health funerals. This type of funeral arrangement happens where a person dies within the borough and when no relatives of the deceased can be found, or the relatives of the deceased cannot or will not arrange a funeral. A public health funeral cannot be 'applied for' as an alternative funeral arrangement choice by members of the public. There has been an increase in the number of referrals since 2021 and this trend has continued through 2023/24. Whilst the cause of the increase is inconclusive it is likely that the cost of living crisis is a factor. As this is a statutory function of the Council additional funding is needed to support this pressure.

#### Health and Wellbeing: Adult Social Care (-£8.201m)

- 6.96. As set out in the paragraphs above, there are a number of specific ring-fenced grants provided for specific elements of adult social care, including the ASC Market Sustainability and Improvement Fund and the Discharge Fund which are to be allocated to adult social care to meet the expected demand in services. This will enable

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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 essentially replaces existing funding available from the ICB. In addition to this the adult social care precept raised is to be applied to adult social care services.

- 6.97. The uplift in Social Care grant has also been utilised to support growth and pressures within the services, and whilst government states that this is to be utilised to support both adults and children's social care, there is an expectation that c70% of this is allocated to ASC. The growth and pressures funding provided in 2024/25 complies with this expectation.

#### Organisational value for money (-£2.006m)

- 6.98. In addition to the corporate strategy the Council is a large and complex organisation. Over the previous decade 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 ensure that the resourcing for some corporate services remains sufficient. 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.
- 6.99. In prior years savings were taken from the corporate insurance reserves to ensure that where these were deemed to be increasing beyond the levels required to prudently provide for potential claims that these were drawn down on to support front line service budgets. These savings were time limited and the reserve levels are now considered to be at the level where further contributions to revenue budgets can no longer be made.
- 6.100. Finally there is a £1.000m pressure in Legal Services due to agency and external expenditure to deliver Social Care legal work (challenges recruiting in this area) and the level of workload. There are also cost pressures on property work as well as the more complex Capital development schemes, this includes disputes, contract drafting, advice on grants/structuring/tax VAT/grant regimes. This reflects the pressures reported in 2023/24 and require funding to sustain the level of service required to support the Council.

#### Inflation

- 6.101. 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.
- 6.102. 2023 has seen CPI reduce from its 40 year highs in 2022, with the rate reducing from its highest point of 10.7% in November 2022 to a figure of 4.6% in October 2023. However, the reduction in inflation was slower than originally forecast and there is a lag between the rate of CPI and the level of inflation experienced by the Council through its contract inflation uplift obligations and salary negotiations and agreements.
- 6.103. This was reflected between the agreed Medium Term Finance Strategy in July 2023, where the Council was assuming to budget 3% for pay award and 2.5% for non-pay inflation, and the MTFs presented to PASC which provided for inflationary uplift to both pay and net non-pay budgets of 4%.
- 6.104. 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 2024/25 and/or 2025/26. This will be reviewed and reported to Members as part of the 2024/25 MTFs process and regular financial monitoring.

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- 6.105. 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.

Salary inflation 2024/25 (-£5.816m)

The 2024/25 assumed salary uplift has been based on a pay award of 4%. This reflects a judgement based on the final 2023/24 agreement which averaged to almost 6%, and the current and forecast levels of inflation anticipated for 2024/25.

Salary inflation 2023/24 unfunded (-£1.844m)

- 6.106. The 2023/24 budget growth of £7.120m for the pay award was equivalent to 5%, this was set based on the final 2022/23 agreement which averaged to almost 6%, and in the absence of an agreed position. The final agreed settlement for 2023/24 equates to an average uplift of circa 6%, which has created a forecast budget shortfall of £1.844m in 2023/24 which has been funded in year from reserves or corporate provisions. This increase needs to be permanently funded in 2024/25.

Non-pay inflation (-£4.401m)

- 6.107. The revised MTFS assumed a 4% uplift for net non-pay inflation which equates to £4.401m. 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.

**Summary of Budget Pressures and Investment**

- 6.108. 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.
- 6.109. 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 2024/25.
- 6.110. 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. However, due to the immediate spending pressures faced and unlike in previous years, we are unable to set aside any of the Budget to fund these risks should they emerge during 2024/25. As such, any further pressures will have to be met from corporate provisions and reserves pending action being taken to bring spending back in line with the available Council resources and Budget.

**Overall Budget Position for 2024/25**

- 6.111. For 2024/25, the overall budget position for the Council is an assumed General Fund Budget Requirement of £293.838m, as set out in Table A4 below:

**Table A4: Overall Budget Position for 2024/25**

Detail	Expenditure/ (Income) £m	Expenditure/ (Income) £m
Settlement Funding Assessment (SFA) for 2024/25	(137.197)	
Council Tax 2024/25 at 4.99% increase	(141.641)	
Section 31 grant	(15.000)	
<b>Assumed Budget Requirement for 2024/25</b>		<b>(293.838)</b>
Base Budget for 2023/24	263.680	
<b>Plus:</b> Additional Pay inflation 2024/25	5.816	
<b>Plus:</b> Pay Inflation 2023/24	1.844	
<b>Plus:</b> Non-pay Inflation	4.401	
<b>Plus:</b> Budget pressures to be funded	34.011	
<b>Plus:</b> Adult Social Care Precept	2.680	
<b>Less:</b> Uplift in Social Care Grant 2022/23	(1.950)	
<b>Less:</b> Uplift in Social Care Grant 2024/25	(4.539)	
<b>Less:</b> Net Market Sustainability and Improvement Fund	(2.781)	
<b>Less:</b> Discharge Fund	(1.397)	
<b>Less:</b> New overspend reduction proposals	(5.630)	
<b>Less:</b> Agreed cuts	(2.315)	
<b>Total</b>		<b>293.838</b>

**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.

6.112. The statutory calculation for the 2024/25 budget requirement is attached to this report at Appendix Y6.

6.113. At this time, on the budget assumptions for the General Fund set out above, no use of reserves to set the balanced base budget is required for 2024/25, although £1.5m of once off funding from reserves has been applied for the year 2024/25. However, On 24 January 2024 government announced an additional £500m nationally of funding for councils with responsibility for adults and children's social care, distributed through the Social Care Grant. The allocation of this will be made in the Budget on the 6 March 2024. This additional funding will replace the £1.5m planned once off use of reserves in 2024/25.

#### Fees and Charges 2024/25

6.114. 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.

6.115. 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

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report setting out the fees and charges for 2024/25 and the relevant service commentary are included at Appendix Y8.

#### Use of Provisions and Reserves

- 6.116. Initially it was assumed that £1.5m of reserves would be used to fund children's social care pressures on a temporary basis for 2024/25, however on 24 January 2024 government announced an additional £500m nationally of funding for councils with responsibility for adults and children's social care, distributed through the Social Care Grant. The allocation of this will be made in the Budget on the 6 March 2024. This additional funding will replace the £1.5m planned once off use of reserves in 2024/25.
- 6.117. 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.
- 6.118. 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 or do not deliver the anticipated benefits;
  - Capital programme overruns hit revenue; and
  - Further savings are not identified, putting strain on future budgets.
- 6.119. Further discussion of the use of reserves and planning for future budgets form part of the s151 officer's section 25 report at Appendix Y5 and will continue to be reviewed and brought back for Member consideration as part of the next Medium Term Financial Strategy in 2024.

## **7. Future Years Budget Strategy and Risks**

- 7.1. This section of the report considers the updated forecast Medium Term Financial Strategy for the Council, as amended in November 2023, and presented to PASC and the key financial risks associated with both the draft budget for 2024/25 and the longer term risks associated with the four year financial planning window.

### **Future Years Budget Strategy**

- 7.2. Utilising the information available at that time to form assumptions as to the likely income receivable and costs pressures to be funded, the Council forecast what the likely funding shortfall would be for the period 2024/25 – 2027/28. This analysis produced a base case cumulative budget gap over the four year period of circa £20m before allowing for any future demand pressures and service overspending.
- 7.3. Essentially the Council will require c£10m per annum to fund a combination of pay and no-pay inflation with some funding available for unavoidable cost pressures. This cannot all be recovered through increases in Council Tax with the difference being the budget gap. Depending on the timing and impact of the Fair Funding Review, the Council will need to identify savings of between £5m - £15m per annum. The amounts are 'spiky' due to the uncertainty of funding reforms and the risk higher due to some of the larger spending services' inability to stay within allocated budgets in recent years.

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- 7.4. For example; on the basis that the key pressure to be managed is that of general market inflation, the MTFS does not provide pressures funding of the scale currently funded in 2023/24 and 2024/25 to support systemic pressures and fragile markets as seen in children's social care and temporary accommodation.
- 7.5. If pressures such as these arise, or are not adequately managed and mitigated, the scale of reductions required will be equivalently larger.
- 7.6. This, coupled with the once off nature of the £4.099m of funding assumed to be needed in 2024/25, has resulted in EMT implementing a targeted approach to developing savings from strategic service changes over more than one year. This will also enable discussion of possible upfront investment required for those items which may be invest-to-save schemes linked to the transformation of service delivery and corporate effectiveness as opposed to budget and service reductions. These 'deep dives' into services such as children's social care, SEN transport, temporary accommodation and the HRA more generally will be required to ensure that the Council can reduce its reliance on the once off funding and keep spending within the forecast MTFS Budget resources allowances.
- 7.7. Existing governance arrangements will be utilised where appropriate to ensure that there is rigorous oversight of the programmes that are brought forward to support these reduction measures. In particular, EMT sitting as a strategic change board.

### **Risks**

- 7.8. The provisional Local Government Settlement again provided only a single year rollover settlement and the Autumn Statement suggested that the growth provided in the current spending round would be funded via reductions in spending in future spending rounds. Therefore, officers are reasonably confident in the forecasting for 2024/25, but have had to make their own assumptions for the remaining four year period in the MTFS. The modelling for 2025/26 – 2028/29 is heavily caveated based on this uncertainty.
- 7.9. The Funding Reforms to Business Rates and the Social Care funding reforms have been further delayed and are not expected until 2026/27 which introduces further risk and uncertainty. However, the new Non-Domestic Ratings Act introduced passed in October 2023 and is effective from 1 April 2024. It provides for separator multipliers to be applied to the small businesses compared to the standard rates and that these can be independently changed and increased. Government has confirmed that they will be freezing the small business multiplier and uplifting the standard rate multiplier by CPI, and that local authorities will be protected via section 31 funding. However, the detail to fully assess the impact of this is not yet available and the longer term impact of the decoupling may introduce increased risk in future years. It also means any return to the London collaboration around a business rate pool remains for the future.
- 7.10. The scale of social care funding is increasing and Local Government grows ever more reliant on both local taxes and the various social care grants (iBCF, BCF, PH, SCG, market sustainability with a combined value of c£100m) to support services. At £100m and growing these additional grants only committed from one year to the next represent over 33% of the core budget of £293m. Any significant changes to these will increase the risk to the Council which may have to make sudden and drastic changes to service delivery within social care or proportionately reduce other services. The mitigation to this risk would usually be to hold higher levels of reserves to give time to be able to respond but reserves are now declining as being used to support current levels of (over)spending. If this continues beyond the very short term it is not sustainable for the MTFS.
- 7.11. There also remains the significant risk that the general fund may be required to support both the ring fenced HRA and schools budget. The housing repairs and maintenance

costs required to meet the decent homes standard may be unable to be accommodated within the current HRA budget allocations, hence the importance of not overspending the HRA budget in 2024/25 and the request for budget savings of at least 10% on non-repairs HRA budgets. In addition to the SEN transport costs may in the general fund, the statutory override (which ringfences the current circa £14m unfunded SEN deficit to schools reserves) may be lifted, meaning that the general fund reserves would be required to meet this.

- 7.12. Apart from funding stream risks there are a number of other risks and issues which, although difficult to quantify with absolute certainty, could prove significant should they materialise.
- 7.13. 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:
- Legislative or policy changes
  - Service Investment
  - National / London Living Wage;
  - Redundancy;
  - Unachieved budget reduction;
  - Wider public service delivery failure; and
  - Further inflation.

#### Legislative or Policy Changes

- 7.14. 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. For example, the for drinks containers, where consumers will be incentivised to take their empty drinks containers to return points hosted by retailers.
- 7.15. Combined with 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.
- 7.16. 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, and the proposals for the free collection of garden waste and to provide separate collections for dry recycling.
- 7.17. 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.
- 7.18. 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 2023/24 but has recently been extended until 2025/26. However, the extension of the override is not permanent and the DSG deficit is forecast to be circa £14m by the end of

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2023/24. 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

- 7.19. 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

- 7.20. 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.
- 7.21. 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

- 7.22. 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

- 7.23. 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.
- 7.24. 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.

#### Wider public service delivery failure

- 7.25. There is risk from immediate cost of living pressures growing with the risk of future economic growth stalling with associated rising unemployment which sits alongside the risk of service pressures in other areas of the public sector driving need onto local authorities as the public provider of last resort. For example, the risks of failing infrastructure for energy, water and transport, rising health waiting lists and delays to treatment, withdrawal of financial support through the benefits system, and rising crime and anti-social behaviour increasing community tensions. These risks combine with a growing and longer living population in the Borough with greater needs and more vulnerabilities, all of which put demand on Council services at greater cost. Estimating these potential impacts is challenging.

#### Inflation

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- 7.26. In setting the 2024/25 budget, the Council has budgeted for salary inflation of 4% and (net) non-salary inflation of 4%. In order to remain within these funding parameters services are expected to seek to negotiate contract efficiencies to drive through better value where possible. However, for some contracts this will not be possible due to contractual inflation linked clauses within the contract or negotiation where allowed, e.g. linked to the London Living Wage rather than CPI. It is also possible that for contracts where inflation is held in 2023/24, that this will cause significant upward pressure on costs in 2024/25, in that it won't be possible to absorb inflation for more than one year. Furthermore, the Council only budgets for inflation uplift on a net basis, and if fees and charges are not raised by inflation (and this is possible where these are set by Government) or if the level of demand for the services means that less income is generated overall, this will also increase the inflationary pressure on budgets. Any additional pressures will be met in 2024/25 from reserves and require correction in the 2025/26 budget setting process, meaning that the inflation lag may outstrip current inflation within the economy.
- 7.27. The Council will ensure that it monitors these and any other risks materialising via the monthly financial monitoring to EMT, and the quarterly reporting to Mayor and Cabinet. These will inform the 2024/25 Medium Term Financial Strategy and the planned 'deep dive' processes will ensure that the reliance on reserves and other once off grants in 2024/25 is reduced and service pressures contained within the forecast budgetary allowances in order to ensure the financial robustness of the Council.

## 8. Dedicated Schools Grant and Pupil Premium

### Update on 2023/24 Dedicated Schools Grant

- 8.1. The 2023/24 Dedicated Schools Grant (DSG) grant allocation was advised by the Department for Education (DfE) in December 2022. The information provided at that time was the gross figure before academy recoupment, high needs adjustment and revision of the Early Years Block pending January census validation. The table below shows the projected outturn position for the DSG for 2023/24 against the revised funding available. Please note that the Early Years Block remains provisional and will not be confirmed until later in the Summer 2024 (i.e. post closure of accounts).

**Table B1: DSG Projected Outturn 2023/24**

DSG Projected Outturn	Schools Block	Central School Services Block	High Needs Block	Early Years Block	Total DSG Allocation
	£m	£m	£m	£m	£m
Gross Budget	231.0	3.3	76.9	24.8	336.1
In Year Virement	(0.7)	0	0.7	0	0.0
ESFA Holdback	(47.5)	0.0	(0.4)	0.0	(48.0)
<b>DSG Budget</b>	<b>182.8</b>	<b>3.3</b>	<b>77.1</b>	<b>24.8</b>	<b>288.1</b>
Expenditure	182.5	3.3	80.1	24.8	290.8
<b>Total Spend</b>	<b>182.5</b>	<b>3.3</b>	<b>80.1</b>	<b>24.8</b>	<b>290.8</b>
<b>Variance</b>	<b>(0.3)</b>	<b>0.0</b>	<b>3.0</b>	<b>0.0</b>	<b>2.7</b>

- 8.2. In the Schools Block there is an underspend in the Growth fund of £0.3m, which will be carried forward, and £0.7m has been agreed with School's Forum to be transferred to support the high needs block and is shown as an in year virement. This forms part of the regulations that enable a maximum transfer of 0.5% in agreement with Schools Forum.

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- 8.3. Whilst the Central Schools Block is forecasting a balanced position this is post the application of corporate support. This element has been decreasing over the previous three years and will continue to do so and therefore there is a risk that this will create a pressure in future years.
- 8.4. The High Needs continues to show a pressure against the available funding. Lewisham has been progressing a mitigation plan and is now working with the DfE as part of the Delivering Better Value initiative (Phase 3). Lewisham is awaiting the outcome of an application for a £1m, 18 month grant which support further initiatives to arrest the growth of the deficit.
- 8.5. In the Early Years Block the DfE has confirmed the final numbers for 2022/23 and there is an unused balance of £0.8m. Schools forum has agreed to the proposal to transfer £0.6m to the High Needs Block and £0.2m to support the pressure on the Inclusion Fund. The high needs block forecast includes this income.
- 8.6. In overall terms the DSG cumulative deficit is expected to be circa £14m at the end of 2023/24 reflecting the pressure on the High Needs Block (after allowing for support from Schools Block and Early Years).

### **Dedicated Schools Grant and Pupil Premium for 2024/25**

- 8.7. This section of the report considers the Dedicated Schools' Grant (DSG) and the Pupil Premium Grant for 2024/25.
- 8.8. 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). Funding is based on National Funding Formulae which determines each of the blocks and collectively determines the overall DSG. The gross allocation of DSG for 2024/25 is £363.126m, compared with £336.035m in 2023/24. Representing an increase of £27m.

**Table B2: Dedicated Schools Grant 2023/24 vs. 2024/25**

	Schools Block	CSSB	High Needs	Early Years	Total
	£m	£m	£m	£m	£m
2024/25	240.662	3.014	79.225	40.225	363.126
2023/24	231.030	3.309	76.852	24.845	336.035
Net Movement	9.632	(0.295)	2.373	15.381	27.091
% Increase/(Decrease)	4%	(10%)	3%	38%	7%

- 8.9. 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. Within the £15.381m increase for the Early Years Block is £11.381m of funding for national policy changes on the EY entitlement offer being extended, so is effectively linked to new responsibilities. The funding is not guaranteed as it is based on actual take up at specific census dates.
- 8.10. The Schools Block is the main basis to support the Schools Delegated budget share. Schools' forum met on the 18<sup>th</sup> January 2024 and agreed to a zero % increase in the Minimum Funding Guarantee (MFG), there are currently 33 schools on MFG. It is proposed that approximately £0.7m be transferred to support the pressure on the high needs block. Of the £9.6m uplift on this grant there is £7.5m of funding that schools currently receive via the Mainstream Additional Grant, as such this is not new money.
- 8.11. The High Needs Block, which supports SEND, remains under continued financial strain, the increase for 2024/25 is circa £2.373m (i.e. 3%). This is significantly lower than has been the case over the last few years, as such will result in continued



pressure on the HNB. 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, albeit not at the same cost as stated above. The work and initiatives proposed as part of the DfE Delivering Better Value initiative will further enable the Council to seek to stop the growth in the deficit.

- 8.12. The Central School Services Block has again been reduced in 2024/25, with a net reduction of £0.295m from 2023/24. There is an expectation that this will continue to reduce year-on-year. This reduces the funding available to support Local Authority Statutory functions.
- 8.13. The funding for Early Years remains provisional subject to a pupil data cleansing exercise based on January 2024, as such the final budget will not be known until the summer of 2024, which is in line with previous years.
- 8.14. The Early Years Block will be further complicated by changes in national policy which extends the Early Years offer:
  - 3 and 4 Year Old Offer (current offer at £7.24 per hour),
  - 2 Year Old Offer - disadvantage (current offer at £7.24 per hour),
  - 2 year old working parent entitlement (new offer as at 1st April 2024 at £10.64 per hour), and
  - Under 2 years old entitlement covering 9 months to 2 years (from 1st September 2024 at £14.52 per hour).

#### **Pupil Premium Grant for 2024/25**

- 8.15. The pupil premium will continue in 2024/25. Pupil premium is based on factor known as Free School Meals Ever 6. At the time of writing we have been advised of the following increase in the funding rates. The final allocation will not be known until the summer of 2024. The 2023/24 pupil premium figure is currently £15.167m:
  - Primary schools £1050, increase of £15 (1%),
  - Secondary schools £2570, increase of £40 (2%), and
  - Children Looked After £2570 increase of £40 (2%).

#### **Pupil Numbers**

- 8.16. The total changes in pupil numbers are as shown in Table B3 below. Overall, there is a net reduction in numbers of 251 pupils compared with 227 in 2023/24, this represents a net reduction of 0.7%. Whilst relatively small at present, this is the sixth consecutive year of fall and 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 B3: Total Changes in Pupil Numbers from 2023/24 to 2024/25**

	Primary Age Pupils	Secondary Age Pupils	Variance
2024/25	22,201	11,728	33,928
2023/24	22,552	11,628	34,179
<b>Variance</b>	<b>(351)</b>	<b>100</b>	<b>(251)</b>
<b>Variance (%)</b>	<b>(1.56)</b>	<b>0.86</b>	<b>(0.73)</b>

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## Potential Risks

8.18. 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.
- 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%.
- 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 a 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 full in the funding allocations, and schools may struggle to meet these costs over the coming year.
- 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.
- Early Years National Policy - as described in this report, there is significant changes in the provision of the Early Years Entitlement offer. The implementation will be over a period of 2 years. The figures provided in this report are based on DfE estimate of take up but will be finalised post census. The under 2's element provides a more specific risk as the funding is allocated for 12 months, whilst the implementation is due from September 2024. There is further complexity arising from the timing of the implementation which has been raised with the DfE.
- The funding allocation for high needs is significantly lower than in previous years and is likely to result in a larger overspend for 2024/25.

## 9. Housing Revenue Account (HRA)

9.1. The budgeted expenditure for the HRA in 2024/25 is £224.5m, including the capital and full new build programme.

9.2. It is structured as follows:

- Update on the HRA financial position for 2023/24;
- Update on the HRA Business Plan; and
- Future Years' Forecast.

### Update on the HRA Financial Position for 2023/24

9.3. The HRA is budgeted to spend over £118m in 2023/24. The latest forecast on the HRA for 2023/24, is that net expenditure cannot be contained within budget by the year end.

Revenue Repairs and Maintenance is forecast to overspend by £4.7m as at P6 and Major Works recovery is expected to be lower than budget by approximately £7.9m. Overall the HRA is forecasting a deficit of £6.5m as at P8 after taking management action. This will be mitigated by the use of once-off contingencies, reserves and revenue working balances.

### **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.
- 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 cost-of-living crises and 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.

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- 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% in 2023/24, without additional funding to housing providers.
- 9.13. For financial year 2024/25, Government has not sought to reduce or cap the forecast rent increases which are based on CPI + 1%. The CPI data for September 2023 was 6.7% and therefore rent will increase by 7.7% based on the government's formula rent calculation. This results in an average increase of £8.57pw 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 2023) from £111.33pw to £119.91pw.
- 9.14. The HRA financial model has therefore been updated with current government formula rent calculations at a maximum of 7.7% for financial year 2024/25. Long term rental forecasts are based on the assumption of rent increases based on CPI + 0.5%.
- 9.15. Our top priority is to make our blocks safe; we also want to get all of our 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 5% for 2024/25. Non-pay inflation such as R&M, materials and contract costs are forecast at 6.7% 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 though increased efficiencies and reprioritisation of investment requirements across stock condition and/or development plans.
- 9.21. A review of current investment needs and priorities continues to be refreshed, 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 7.7% rent increase estimates

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for 2024/25. 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).

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**Table C1: Update on the HRA Business Plan**

HRA Income & Expenditure Estimates - 5 year Forecast	2024/25	2025/26	2026/27	2027/28	2028/29
	£m	£m	£m	£m	£m
<b>Income:</b>					
Rental income	(87.7)	(89.9)	(94.5)	(99.5)	(101.2)
Tenants service charge income	(7.3)	(7.4)	(7.5)	(7.5)	(7.6)
Leasehold service charge income	(6.6)	(6.7)	(6.8)	(7.0)	(7.1)
Hostel charges and grant income	(1.5)	(1.5)	(1.6)	(1.6)	(1.6)
Major Works recoveries	(6.3)	(6.4)	(6.5)	(6.7)	(6.8)
Other income	(1.7)	(1.8)	(1.8)	(1.8)	(1.8)
Interest earned on balances	(0.4)	(0.4)	(0.4)	(0.4)	(0.4)
<b>Total Income</b>	<b>(111.5)</b>	<b>(114.1)</b>	<b>(119.1)</b>	<b>(124.5)</b>	<b>(126.5)</b>
<b>Expenditure:</b>					
Management costs	48.2	47.9	49.5	52.9	55.4
Repairs & maintenance	18.2	18.5	18.7	19.9	21.0
PFI Costs	6.8	6.8	6.9	1.7	0.0
Interest & other finance costs	6.6	9.4	12.6	15.5	17.1
Depreciation	26.7	27.2	27.7	28.2	28.6
Revenue Contribution to Capital	5.0	4.1	3.1	5.9	4.3
<b>Total Expenditure</b>	<b>111.5</b>	<b>113.9</b>	<b>118.5</b>	<b>124.1</b>	<b>126.4</b>
<b>Surplus/(deficit):</b>					
<b>Surplus/(deficit)</b>	<b>0.0</b>	<b>(0.2)</b>	<b>(0.6)</b>	<b>(0.4)</b>	<b>(0.1)</b>
<b>HRA Reserves:</b>					
Opening HRA reserves	9.6	9.6	9.8	10.3	10.8
Contribution to/(Drawdown) from reserves	0.0	(0.2)	(0.6)	(0.4)	(0.1)
<b>Closing HRA Reserves</b>	<b>9.6</b>	<b>9.8</b>	<b>10.3</b>	<b>10.8</b>	<b>10.9</b>
<b>Forecast Capital Programme &amp; Funding:</b>					
Capital programme (including decent Homes)	90.1	70.5	55.1	55.1	59.4
New Build construction & on-going costs	22.7	84.0	118.0	49.5	16.4
<b>Total Capital Expenditure</b>	<b>112.8</b>	<b>154.5</b>	<b>173.1</b>	<b>104.6</b>	<b>75.8</b>
<b>Capital Programme Funded By:</b>					
MRR Opening Balance	0.0	0.0	0.0	0.0	0.0
Revenue Contribution to Capital	(5.0)	(4.1)	(3.1)	(5.9)	(4.3)
Depreciation	(26.7)	(27.2)	(27.7)	(28.2)	(28.6)
GLA Grants	(14.6)	(36.1)	(17.3)	(7.4)	0.0
RTB Receipts	(3.7)	(16.7)	(24.3)	(10.3)	(3.2)
Sale Receipts	(1.0)	(1.0)	(16.4)	(17.1)	0.0
Other Receipts	0.0	0.0	0.0	0.0	0.0
Borrowing	(61.8)	(69.4)	(84.3)	(35.7)	(39.7)
<b>Total Capital Funding</b>	<b>(112.8)</b>	<b>(154.5)</b>	<b>(173.1)</b>	<b>(104.6)</b>	<b>(75.8)</b>
<b>Capital shortfall</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>
<b>HRA Actual Debt Level (Forecast)</b>	<b>188.4</b>	<b>257.9</b>	<b>342.3</b>	<b>377.9</b>	<b>417.5</b>

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

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- 9.23. As can be seen from the above table, the expected total expenditure, before financing, for the HRA in 2024/25 is £224.3m, comprising £111.5m operational costs and £112.8m capital and full new build costs.
- 9.24. The HRA capital forecasts in the Table C1 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 Lewisham Homes ALMO was in-sourced on 1<sup>st</sup> October 2023 as agreed by Mayor & Cabinet in their meeting of 9th December 2022. Consequently, there is a half year of management fees paid to Lewisham Homes and a half year of direct costs within the HRA budget allocation for 2023/24. Budget allocations will be updated in 2024/25 to reflect the full in-sourcing of the ALMO.
- 9.26. Work is ongoing to assess the once-off costs of the in-sourcing 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 will be further developed and implemented in 2024/25. 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 management costs in 2024/25 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 Council housing residents are attached at Appendix X2a & X2b and Appendix X3, 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.
- 9.31. In line with the formula rent calculation policy, rents for 2024/25 will increase by 7.7% based on CPI of 6.7% (as at September 2023) + 1% for 2024/25 and CPI + 1% up until 2025.
- 9.32. A 7.7% increase in average rents for HRA dwelling stock 2024/25 equates to an average increase of £8.57pw over a 52-week period. This will increase the full year average dwelling rent for the London Borough of Lewisham from £111.33pw to £119.91pw. The proposed increase will result in additional income of £6.140m for the HRA against 2023/24 income levels.

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- 9.33. 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.
- 9.34. 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 5% for 2024/25. Non-pay inflation such as R&M, materials and contract costs are forecast at 6.7% for 2024/25.
- 9.35. 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.
- 9.36. 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 Council tenants. Full details of residents' feedback, additional comments received, minutes of meetings and the response to the additional comments received are contained in Appendix X1.
- 9.37. The main comments received from Council 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.
- 9.38. Council residents comments regarding affordability and value for money concerning the proposals for rents, garages and service charges.
- 9.39. Details of the options for the rent and service charge changes for 2024/25 were presented to the Housing Select Committee on 28<sup>th</sup> November 2023. The committee noted the contents of the report.
- 9.40. Having regard to the outcomes of the consultations held in November 2023 as set out above (and with more detail in Appendices X2, X3, and X4), Mayor and Cabinet is asked to make a recommendation to full Council that a 7.7% rent increase be agreed as per the Governments formula rent calculation for 2024/25. The new average rent for 2024/25 is likely to be in the region of £119.91pw, an increase of approximately £8.57pw from 2023/24 levels .

### **Other Associated Charges**

- 9.41. 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 2024/25 are set out in detail in Appendix X4 and Appendix X6.

### Former Tenant Arrears Write Offs

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- 9.42. The HRA self-financing of 2012 means that the Council now has considerably greater control over the long term planning of its Housing Revenue Account, and this longer term focus has allowed excellent progress to be made in delivering investment into new Council homes for the first time in 30 years.
- 9.43. As part of the annual review of the HRA and the setting of associated budgets, this long term focus also requires officers to review both the assumptions that underpin long term plans and the operational performance of delivering that plan. In that regard it is important for officers to consider at this time the likelihood of recovering all of the income to which the Council is due.
- 9.44. The service has improved the way its income collection processes work and has addressed the majority of historic arrears cases. The percentage of rent collected in 2022/23 was over 98% and at the latest update, approximately 99% had been collected in the current financial year. This high-income collection rate strengthens the performance of the HRA and enables greater levels of investment for both existing residents and to build the new Council homes Lewisham so desperately needs.
- 9.45. However, there remains a limited number of historic bad debt cases in which officers, despite exhausting all possible options, have been unable to collect. In total there are 32 such cases, which in total constitute outstanding arrears of £561,449.14. A summary of these cases is set out at Appendix X5. It is proposed that these are now written off.

### **Summary**

- 9.46. The gross budgeted expenditure for the HRA in 2024/25 is £224.3m, £111.5m revenue and £112.8m capital. Mayor and Cabinet is asked to recommend that Council approve a rent increase of 7.7% having considered tenant's feedback following consultation held in November 2023. The current average weekly rent is £111.33 in 2023/24. This will increase to £119.91pw in 2024/25.

## **10. Treasury Management Strategy 2024/25**

- 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. Chartered Institute of Public Finance and Accountancy (CIPFA) defines treasury management as: “The management of the local authority’s borrowing, investments and cash flows, including 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. 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.
- 10.7. During 2023/24 the Council has not exceeded its Prudential or Treasury indicators. Council investments are managed within the guideline parameters however on 21 November 2023 an investment of £10m was made in Close Brothers Bank for a twelve-month term and this exceeded the guidelines which recommend a maximum of six months term. By 21 May 2024 the Council will be back inside its investment guidelines.

#### **Treasury Management Strategy for 2024/25**

- 10.8. The strategy for 2024/25 covers two main areas:

##### 10.8.1. Capital issues:

- The output of the capital expenditure plans is reflected in the prudential indicators, which are designed to assist members’ overview and confirm capital expenditure plans are prudent, affordable, and sustainable;
- The minimum revenue provision (MRP) policy.

##### 10.8.2. Treasury management issues:

- The current treasury position;
- Treasury indicators which limit the treasury risk and activities of the Authority;
- Prospects for interest rates;
- The borrowing strategy;
- Policy on borrowing in advance of need;
- Debt rescheduling;
- The investment strategy;
- Creditworthiness policy; and
- The policy on use of external service providers.

- 10.8.3. There is a requirement to produce Investment Management Practices for Service and Commercial Investment.

## Capital Strategy

- 10.9. 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.
- 10.10. 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.
- 10.11. 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)

- 10.12. The Council's capital expenditure plans are the 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 are prudent, affordable and sustainable.
- 10.13. 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.
- 10.14. Forward projections for borrowing as at 31 March 2024 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

- 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**

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Capital Expenditure Forecast	2023/24 Forecast	2024/25 Estimate	2025/26 Estimate	2026/27 Estimate
	£m	£m	£m	£m
Non-HRA	57.3	95.0	57.1	9.2
HRA	88.0	112.7	134.2	88.8
<b>Total</b>	<b>145.3</b>	<b>207.7</b>	<b>191.3</b>	<b>98.0</b>

10.16. Table D2 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	2023/24 Forecast	2024/25 Estimate	2025/26 Estimate	2026/27 Estimate
	£m	£m	£m	£m
Grants	12.7	29.5	14.4	3.7
S106 & CIL	6.5	98.4	4.5	0.3
Capital Reserves	4.1	2.6	0.8	0
Corporate Reserves	6.4	6.2	0.9	1.7
Capital Receipts	0.1	0.9	1.2	0.5
Right to Buy Receipts	3.9	8.2	4.3	0
Revenue Contribution	0.1	0	0	0
Prudential Borrowing	23.5	39.1	31.0	3.0
<b>General Fund</b>	<b>57.3</b>	<b>94.9</b>	<b>57.1</b>	<b>9.2</b>
Grants	4.4	1.7	18.1	13.8
Major Repairs Reserve	26.2	26.7	27.2	27.7
Right to Buy Receipts	1.4	3.2	13.6	7.6
Revenue Contribution	5.9	2.0	2.2	2.9
Prudential Borrowing	50.1	79.2	73.1	36.8
<b>HRA</b>	<b>88.0</b>	<b>112.8</b>	<b>134.2</b>	<b>88.8</b>
<b>Total</b>	<b>145.3</b>	<b>207.7</b>	<b>191.3</b>	<b>98.0</b>

10.17. Other long-term liabilities - the above financing need excludes other long-term liabilities, such as PFI (Private Financing Initiative) and leasing arrangements that already include borrowing instruments.

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

10.18. 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 Authority'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.

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**Table D3: External Debt Projections**

	2022/23 Actual	2023/24 Forecast	2024/25 Forecast	2025/26 Forecast	2026/27 Forecast
	£m	£m	£m	£m	£m
External Debt at 1 April	224.7	223.5	264.6	372.5	459.7
Expected change in External Debt	(1.1)	41.1	107.9	87.3	19.6
PFI and other Long-Term Liabilities	203.4	182.4	180.7	169.7	158.7
<b>Gross Debt at 31 March</b>	<b>426.9</b>	<b>447.0</b>	<b>553.1</b>	<b>629.4</b>	<b>638.0</b>
CFR - HRA	99.5	148.6	224.5	292.0	322.1
CFR – General Fund PFI and other Long-Term Liabilities	461.8	480.5	512.7	534.5	526.0
<b>Total Capital Financing Requirement at 31 March</b>	<b>561.3</b>	<b>629.1</b>	<b>737.2</b>	<b>826.5</b>	<b>848.0</b>
<b>Borrowing – over/(under)</b>	<b>(134.4)</b>	<b>(182.1)</b>	<b>(184.1)</b>	<b>(197.2)</b>	<b>(210.1)</b>

Treasury Indicators: 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 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 D4 below.

10.23. IFRS 16 will come into effect in financial year 2024/25 and operating leases will be recognised on the balance sheet as a liability. The lease finance is a form of debt, so a provision has been included in other long-term liabilities.

**Table D4: Operational Boundary**

	2023/24	2024/25	2025/26	2026/27
	£m	£m	£m	£m
Maximum External Debt as at 31 March	264.6	372.5	459.7	479.3
PFI and other Long-Term Liabilities	182.4	180.7	169.7	158.7
Provision for Non-Receipt of Expected Income	56.0	56.0	56.0	56.0
<b>Operational Boundary for Year</b>	<b>503.0</b>	<b>609.1</b>	<b>685.4</b>	<b>694.0</b>

The Authorised Limit for External Debt

10.24. This is a key prudential indicator represents a control on the maximum level of borrowing. This represents the legal limit beyond which external debt is prohibited, and this limit needs to be set or revised by Full Council. 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.

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10.25. 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. The authorised limits are as set out in the Table D5.

**Table D5: Authorised Limits for External Debt**

	2023/24	2024/25	2025/26	2026/27
	£m	£m	£m	£m
<b>Operational Boundary for Year</b>	<b>503.0</b>	<b>609.1</b>	<b>685.4</b>	<b>694.0</b>
Additional 10% Margin*	50.3	60.9	68.5	69.4
<b>Authorised Limit for Year</b>	<b>553.3</b>	<b>670.0</b>	<b>753.9</b>	<b>763.4</b>

\* The authorised limit is obtained by adding 10% to the Operational Boundary.

Ratio of Financing Costs to Net Revenue Stream

10.26. This indicator identifies the trend in the cost of capital, (borrowing and PFI and other long-term obligation costs), against the net revenue stream.

**Table D6: Ratio of Financing Costs to Net Revenue Stream**

	2022/23 Actual	2023/24 Estimate	2024/25 Estimate	2025/26 Estimate	2026/27 Estimate
Ratio of Financing Costs to Net Revenue Stream	12.1%	11.5%	10.0%	11.1%	12.1%

10.27. A prudential indicator is required for the net income from commercial and service investments as a proportion of the net revenue stream.

10.28. The Council does not invest in commercial or service investments primarily for a return therefore there is nothing to report for this indicator.

**Liability Benchmark**

10.29. The Council is required to estimate and measure the Liability Benchmark (LB) for the forthcoming financial year and the following two financial years, as a minimum.

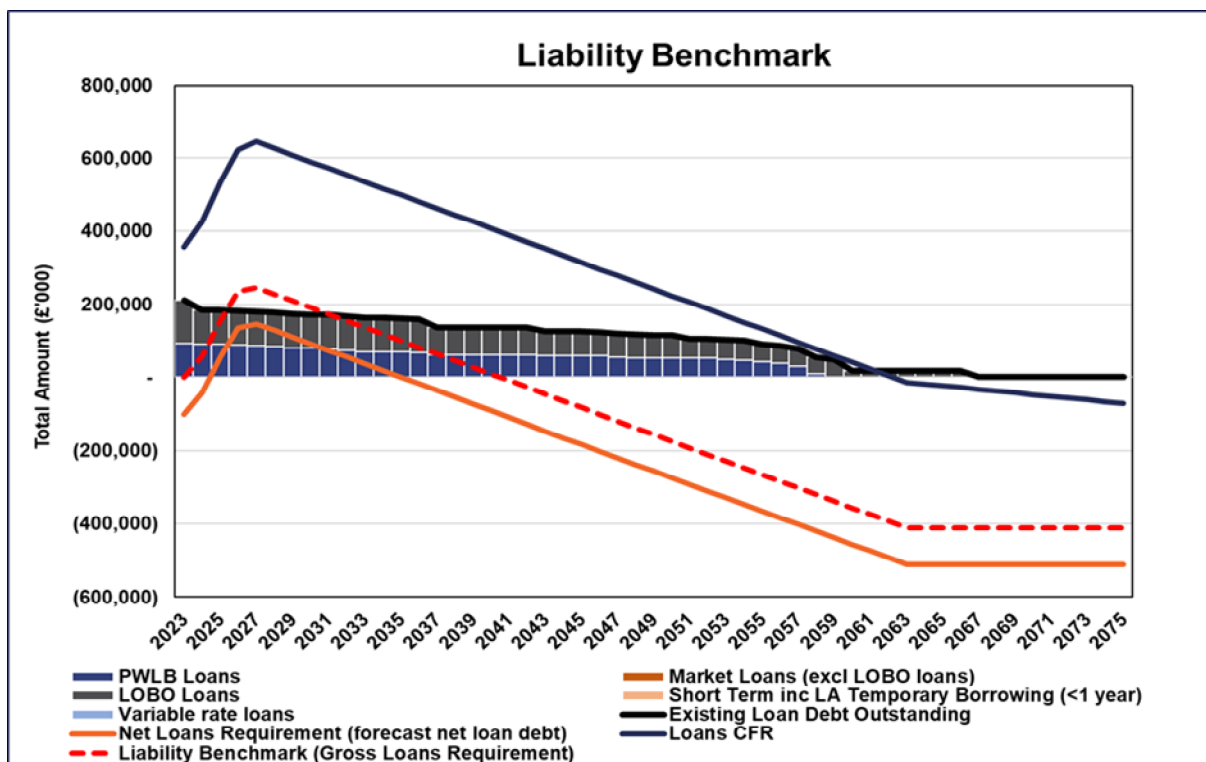
10.30. There are four components to the LB:

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 (the liquidity allowance is cash that is kept as working capital for day to day expenses of the council).

**Graph D1: Liability Benchmark**

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### Minimum Revenue Provision (MRP) Policy Statement

10.31. 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) Statutory Guidance on Minimum Revenue Provision.

10.32. 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.

10.33. 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).

10.34. 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.

10.35. 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

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calculations and a reconciliation to the CFR to identify any potential efficiencies. The review was undertaken by the Council's treasury advisors, Link Group.

- 10.36. 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.
- 10.37. 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.
- 10.38. 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.
- 10.39. 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.
- 10.40. 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.
- 10.41. 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 Strategy**

- 10.42. The Council's external debt as at 31 March 2024, gross borrowing plus long term liabilities, is expected to be £447.0m. The Council's borrowing strategy is consistent with last year's strategy.
- 10.43. The Council is currently maintaining an under-borrowed position. This means that the capital borrowing need, (the Capital Financing Requirement), has not been fully funded with loan debt as cash supporting the Council's reserves, balances and cash flow has been used as an alternative funding measure. This strategy is considered prudent while investment returns are lower than the cost of borrowing and counterparty risk remains an issue to be considered.
- 10.44. 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.
- 10.45. 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.

### Policy on Borrowing in Advance of Need

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10.46. 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

10.47. Rescheduling of current borrowing in our debt portfolio is more likely to occur now that interest rates have risen to the same level as some of our current loans. 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).

10.48. The Council will continue to explore rescheduling opportunities as appropriate in respect of the financing of its PFIs and external loans.

10.49. During 2023/24 two LOBO loans to the value of £25m were repaid and this will leave the Council with LOBO loans to the value of £104m nominal value as at 31 March 2024 of which £25m will be in their call period in 2024/25 for fixed rate LOBO loans, along with £14.9m 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.

10.50. 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.

#### Sources of Borrowing

10.51. 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. UK Infrastructure Bank.
8. Insurance companies.
9. investors in capital market bonds and retail bonds issued by the Council.
10. 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

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conducted by the platform.

11. investors in capital market bonds and retail bonds issued by the Council.

10.52. 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.

## **Investment Strategy & Creditworthiness Policy**

### Policy – Management of Risk

10.53. 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 Management Team); non-financial investments, essentially the purchase of income yielding assets, are summarised at the end of this report, and covered in Investment Management Practices (IMPs) and within the separate Capital Strategy.

10.54. The Council’s investment strategy 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.

10.55. 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 with regard to the Council’s risk appetite.

10.56. In the current economic climate, it is considered appropriate to maintain a degree of liquidity to cover cash flow needs to meet the day to day needs of the Council and to meet its obligations. The Council invests its surplus cash in Money Market Funds it makes investment for periods up to 12 months with high credit rated financial institutions.

10.57. The Council uses Link Group, Treasury Services Limited 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.

10.58. It also recognises that there is value in employing external providers of treasury management services 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.

10.59. The Guidance and CIPFA Treasury Management Code places 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

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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 Z2.
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 Z2 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 or have less than a year left to run to maturity, if originally they were classified as being non-specified investments solely due to the maturity period exceeding one year; and
  - **Non-specified investments** are those with less high credit quality, may be 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 Z2.
6. **Interest rate limits** are set out in Table D8 below and place restrictions on the exposure to variable and fixed rate investments.
7. The Council Council has placed a limit on the amount of its investments which are invested for **longer than 365 days** see Table D9.
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 31/03/23. More recently, a further extension to the over-ride to 31/03/25 has been 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.

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- 10.60. 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.
- 10.61. 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

- 10.62. The Council's Treasury Management Team applies the creditworthiness service provided by the 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.
- 10.63. 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 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 equivalent 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 and LVNAV's in Money Market Funds.*

#### Country Limits

- 10.64. 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

- 10.65. 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.
- 10.66. 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.
- 10.67. 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.

### Treasury Investment

- 10.68. Investment returns are likely to reduce during 2024/25 as interest rates begin to fall. Inflation has fallen to below 5% and is expected to continue to fall over the next 12 months. In September 2023 the Bank of England paused the increase in the Bank Rate. We have already seen the investment market rates fall in expectation that the Bank of England will bring down rates in the future. The war in Ukraine and the conflict in the Middle East leads to uncertainty as they could cause economic damage to the UK and economies around the world with increased oil and gas prices which will lead to increased inflationary pressures in 2024/25.
- 10.69. 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 gradual fall in the Bank Rate during 2024/25. The UK economic is expected to grow very slowly over the next few years. Given this uncertainty, suggested fixed investment returns are expected to fall and money market funds for short term cash investment will provide a lower return.
- 10.70. In light of uncertainty in the market the Council will continue to invest in fixed term deposits of 3-12 month duration. The Council will review, with support from its advisors, investments for 2-3 years so that it may be able to fix into a good rate of return if the interest rates are expected to fall in 2024/25.
- 10.71. The Council's investments 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.
- 10.72. Money Market Fund (MMF) yields have also increased in line with the increases in the Bank of England base rate during 2023/24. The cash held for cash flow purposes can still earn a good return, but it is expected that the Bank of England will reduce the base rate during 2024/25 which will reduce the interest earned from the cash held in the MMF.
- 10.73. A more extensive table of interest rate forecasts for December 2023 onwards, including Public Works Loan Board (PWLb) borrowing rate forecasts, is set out in Appendix Z1.

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### Non-Treasury Investments

- 10.74. 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.
- 10.75. 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. It is also included in the Investment Management Practises. 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. The Code of Practice does not allow this type of investment.\*

*\*The Council will not be making investments primarily for a financial return.*

- 10.76. 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 and Joint Ventures**

- 10.77. 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.

#### Lewisham Homes Limited

- 10.78. Lewisham Homes was 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.
- 10.79. On 1 October 2023 Lewisham Homes was taken back into the Council and the management of approximately 19,000 homes is now carried out by the Council. However, Lewisham Homes continues to own or lease 253 properties (which are managed on their behalf by the Council) and the Council has to date agreed two separate loan facilities with Lewisham Homes Ltd, the first on commercial terms financed from internal borrowing and the second on cost-neutral terms financed through the PWLB for these properties. Both loans will continue to be serviced by Lewisham Homes Ltd and will be repaid on set maturity dates.

- 10.80. As at 31 March 2024 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)

- 10.81. 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.

10.82. 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 2024 the Council expects the outstanding loan principal to be approximately £16.1m.

#### Besson Street Joint Venture

10.83. 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.

10.84. 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.

#### **Performance as at 1 January 2024**

10.85. 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 2023 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.

**Table D7: Full List of Outstanding Investments Held as at 31 October 2023**

Counterparty	Duration	Value	Interest Rate	Interest
	(Days)	£m		£
<b>Fixed Rate Investments – Banks and Building Societies</b>				
Standard Chartered Bank	185	20.0	4.95%	£501,781
Bank of Montreal	364	10.0	4.68%	£466,718
Close Brothers Ltd	183	10.0	5.00%	£252,054
Close Brothers Ltd	183	10.0	5.00%	£252,054
Toronto-Dominion Bank	364	15.0	4.85%	£725,507
Royal Bank of Canada	367	25.0	4.82%	£1,211,603
Australia and New Zealand Banking Group Ltd.	186	10.0	5.96%	£300,449
DBS Bank Ltd	186	10.0	5.87%	£297,520
Bank of Montreal	364	15.0	5.00%	£747,945
National Westminster Bank PLC (RFB)	364	20.0	5.15%	£1,027,178
Toronto-Dominion Bank	364	5.0	5.22%	£260,285
Toronto-Dominion Bank	364	5.0	5.34%	£266,268
Canadian Imperial Bank of Commerce	364	15.0	6.50%	£972,329
OP Corporate Bank plc	364	25.0	6.13%	£1,528,301
DBS Bank Ltd.	183	15.0	5.58%	£419,647
Canadian Imperial Bank of Commerce	364	10.0	5.70%	£568,438
<b>Certificates of Deposit</b>				
Skandinaviska Enskilda Banken AB	364	25.0	5.06%	£1,252,037
Commonwealth Bank of Australia	364	10.0	5.16%	£471,926
Lloyds Bank Corporate Markets Plc (NRFB)	183	10.0	5.64%	£280,822
DNB Bank	364	10.0	5.83%	£578,103
<b>Variable Rate Investments – Money Markets</b>				
BlackRock	N/A	14.3	5.27%	N/A
Federated Hermes	N/A	30.0	5.35%	N/A
Insight	N/A	28.7	5.30%	N/A
<b>Total Investments</b>		<b>348.0</b>		

10.86. The current investment counterparty criteria are set out in the Credit Worthiness Policy and included at Appendix Z2 of this report.

### Treasury Indicators

10.87. 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.

10.88. The debt related indicators are:

- 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.

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10.89. The treasury indicators and limits are set out in Table D8.

**Table D8: Limits of Interest Rates**

Limits on Interest Rate Exposures	2024/25	2025/26	2026/27
	Upper	Upper	Upper
<b>Limits on fixed interest rates:</b>			
• Debt	100%	100%	100%
• Investments*:	80%	80%	80%
<b>Limits on variable interest rates</b>			
• Debt	15%	15%	15%
• Investments*	80%	100%	100%

\* For this calculation short term investments (less than 12 months) are treated as fixed interest rates. Money Market Funds and Certificates of Deposit are included as variable interest investments.

**Limits on Maturity Structure of Fixed Interest Rate Borrowing 2024/25**

	Lower	Upper
Under 12 months	0%	20%
12 months to 2 years	0%	20%
2 years to 5 years	0%	20%
5 years to 10 years	0%	25%
10 years to 20 years	0%	35%
20 years to 30 years	0%	25%
30 years to 40 years	0%	50%
40 years to 50 years	0%	50%

**Limits on Maturity Structure of Variable Interest Rate Borrowing 2024/25**

	Lower	Upper
Under 12 months	0%	5%
12 months to 2 years	0%	5%
2 years to 5 years	0%	5%
5 years to 10 years	0%	5%
10 years to 20 years	0%	5%
20 years to 30 years	0%	5%
30 years to 40 years	0%	15%
40 years to 50 years	0%	10%

**Long Term Investments Indicator**

10.90. 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

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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.

10.91. The indicator is set out in the table below. As at 31 March 2024, the Council is not expected to hold any investments for longer than 365 days.

**Table D9: Treasury Indicators and Limits**

Maximum Principal Sums Invested for Longer than 365 days			
	2024/25	2025/26	2026/27
	£m	£m	£m
Limit on principal sums invested for longer than 365 days	50.0	50.0	50.0

### Training

10.92. 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.

10.93. The Code state that they expect “all organisations to have a formal and 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.

10.94. The scale and nature of this will depend on the size and complexity of the organisation’s treasury management needs. Organisations should consider how to assess whether treasury management staff and board/ council members have the required knowledge and skills to undertake their roles and whether they have been able to maintain those skills and keep them up to date.

10.95. As a minimum, authorities should carry out the following to monitor and review knowledge and skills:

- Record attendance at training and ensure action is taken where poor attendance is identified;
- Prepare tailored learning plans for treasury management officers and board/council members;
- Have regular communication with officers and board/council members, encouraging them to highlight training needs on an ongoing basis.

10.96. The training needs of treasury management officers are periodically reviewed.

10.97. The following training has been undertaken by members of Public Accounts Select Committee on 21 September 2023;

- Link Group ‘Introduction to Treasury Management’ and further training will be arranged as required.

## 11. Capital Programme

11.1. This section highlights the 2023/24 Capital Programme position as at November 2023 and also presents the proposed Capital Programme for 2024/25 to 2027/28.

### Update on 2023/24 Capital Programme

11.2. Progress in delivering the 2023/24 Capital Programme has been reported to Mayor and Cabinet and the Public Accounts Select Committee throughout the year. The latest position reported to Mayor and Cabinet was as part of the P8 Budget Monitoring Report which went to Mayor & Cabinet on 24th January 2024.

11.3. The revised capital programme budget allocation for the year 2023/24 is now £145.3m, of which £57.3m relates to GF schemes and £88.0m to (HRA) schemes. This is summarised in Table E1.

**Table E1: Current position of the 2023/24 Capital Programme**

Directorate	Project/Programme	Spend to 30 November 2023	Revised 2023/24 Budget
		£m	£m
<b>GF:</b>			
Directorate of Corporate Resources	ICT - Tech Refresh	0.0	0.0
Directorate of Community Services	Safer Communities	0.2	0.3
Directorate of Community Services	Parks, Sports and Leisure	0.3	0.6
Directorate of Community Services	Beckenham Place Park (Inc. Eastern Part)	0.3	0.8
Directorate of Community Services	LUF Programme - Cultural Hub	0.2	0.3
Directorate of Children & Young People	CYP - Other	0.0	0.0
Directorate of Children & Young People	Education Services - School Places Programme	1.4	1.8
Directorate of Children & Young People	Education Services - School Minor Works Programme	2.4	3.6
Directorate of Children & Young People	Children's Social Care	0.1	1.6
Directorate of Children & Young People	Families, Quality and Commissioning - Youth Service	0.0	0.5
Directorate of Place	Highways & Bridges – TfL	0.2	0.8
Directorate of Place	Highways & Bridges – LBL	1.7	4.8
Directorate of Place	Asset Management Programme	1.3	3.1
Directorate of Place	Corporate Estates Maintenance Programme	1.0	2.2
Directorate of Place	Strategic Regeneration - Lewisham Gateway	2.1	4.2
Directorate of Place	Strategic Regeneration - Catford Programme	0.7	3.1
Directorate of Place	Planning	0.0	0.1

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Directorate of Place	Public Realm	0.0	0.1
Directorate of Place	Climate Resilience	0.0	0.0
Directorate of Place	LUF Programme - Public Realm	0.0	0.9
Directorate of Housing	General Fund Housing	2.2	27.0
Directorate of Housing	Housing Services	0.8	1.5
	<b>Total GF</b>	<b>14.9</b>	<b>57.3</b>
<b>HRA:</b>			
Building for Lewisham Programme - HRA	Building for Lewisham Programme - HRA	8.1	21.4
HRA Capital Programme (Inc. Decent Homes)	HRA Capital Programme (Inc. Decent Homes)	30.4	65.6
Housing Management System - HRA	Housing Management System - HRA	-0.1	0.5
Aids & Adaptions	Aids & Adaptions	0.3	0.5
	<b>Total HRA</b>	<b>38.8</b>	<b>88.0</b>
	<b>Total Capital Programme</b>	<b>53.7</b>	<b>145.3</b>

- 11.4. The current in-year expenditure across all projects is 37%. If spend is consistent across the year, we would expect spend at Period 8 to be 66%. This pattern of low spend in the early periods of the year is expected for numerous reasons such as lag times on setting up purchase orders and receiving invoices from suppliers.
- 11.5. There are also certain projects with large current years budgets, where the spend is forecast to be spent in the latter half of the year. An example of this is the Housing Acquisition Programme which has an in-year budget of £22m yet current spend of £0m.
- 11.6. As the programme has recently been re-profiled, the budget 2023/24 figures are based on up-to-date cash flow figures. Therefore, barring any major changes to the capital programme, we are expecting to spend close to the budgeted amount of £145.3m.
- 11.7. The following section outlines what the capital programme will look like over the remainder of 2023/24, and how the spend is expected to pick up to the forecast level:
- 11.7.1. **CYP** – There are a number of large schemes that have recently started on site, so subject to further delays these will pick up greatly in spend during the last quarter of the year.
- 11.7.2. **Place** – A large amount of work has been done on a number of these schemes which is yet to be recharged. There are also a number of schemes that are completed in tranches, with the spend coming on the completion of these tranches.
- 11.7.3. **GF Housing** – The large majority of the remaining 2023/24 spend relates to the Housing Acquisition Programme. This scheme is poised to complete on over 50 purchases in the latter part of the financial year.
- 11.7.4. **BfL** – In response to ongoing build cost inflation, several schemes have been delayed or put on hold; resulting in significant reprofiling slippage. There are however a number of schemes currently on site or progressing to planning submission and/or contractor tender with spend increasing over the coming months.
- 11.7.5. **HRA** – Spend has been reasonably consistent over the year, although there has been some slippage against the original budget profile due to issues with

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suppliers. The spend in the remaining months will likely increase due to a backlog of works to be paid and a number of large internal recharges.

- 11.8. The financing of the 2023/24 Capital Programme is set out in the Table E2. This shows the sources of funding used to finance the £57.3m General Fund programme, with the majority coming from capital reserves and grants and the £88.0 HRA programme.

**Table E2: 2023/24 Capital Programme Financing**

	2023/24
	£m
<b>GF:</b>	
Capital Receipts	0.1
Capital Reserves	4.1
CIL	0.0
Corporate Reserves	6.4
Grants	12.7
Prudential Borrowing	23.5
Revenue Contribution	0.1
RTB Receipts	3.9
S106	6.5
<b>Total GF</b>	<b>57.3</b>
<b>HRA:</b>	
Major Repairs Reserve	26.2
Revenue Contribution	5.9
RTB	1.4
Grants	4.4
Prudential Borrowing	50.1
<b>Total HRA</b>	<b>88.0</b>
<b>Total Capital Programme</b>	<b>145.3</b>

**Proposed Capital Programme 2024/25 to 2027/28**

- 11.9. The proposed Capital Programme budget for the General Fund and Housing Revenue Account for the four years from 2024/25 to 2027/28 is £558.0m. This is split into £171.0 for the General Fund and £387.0m for the Housing Revenue Account. Of this programme, £207.7m is allocated into 2024/25; £94.9m with the General Fund and £112.8m with the Housing Revenue Account. This is detailed in Table E3.

**Table E3: Capital Programme 2024/25 – 2027/28**

	2024/25	2025/26	2026/27	2027/28	Total
	Budget	Budget	Budget	Budget	Budget
	£m	£m	£m	£m	£m
<b>GF:</b>					
<u>Directorate of Corporate Resources</u>					
ICT - Tech Refresh	0.6	0.0	0.0	0.0	0.6
<b>Directorate Total</b>	<b>0.6</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.6</b>
<u>Directorate of Community Services</u>					
Safer Communities	0.2	0.0	0.0	0.0	0.2
Parks, Sports, and Leisure	0.1	0.0	0.0	0.0	0.1
Beckenham Place Park (Inc. Eastern Part)	0.4	0.0	0.0	0.0	0.4
LUF Programme - Cultural Hub	2.7	4.8	0.2	0.0	7.7
<b>Directorate Total</b>	<b>3.4</b>	<b>4.8</b>	<b>0.2</b>	<b>0.0</b>	<b>8.4</b>

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<u>Directorate of Children &amp; Young People</u>					
CYP - Other	0.3	0.0	0.0	0.0	0.3
Education Services - School Places Programme	4.6	3.8	0.2	0.0	8.6
Education Services - School Minor Works Programme	3.2	0.0	0.0	0.0	3.2
Children's Social Care	0.3	0.0	0.0	0.0	0.3
Families, Quality and Commissioning - Youth Service	0.7	0.0	0.0	0.0	0.8
<b>Directorate Total</b>	<b>9.2</b>	<b>3.8</b>	<b>0.2</b>	<b>0.0</b>	<b>13.3</b>
<u>Directorate of Place</u>					
Highways & Bridges – TfL	0.0	0.0	0.0	0.0	0.0
Highways & Bridges – LBL	0.7	0.0	0.0	0.0	0.7
Asset Management Programme	3.8	1.3	0.5	0.5	6.1
Corporate Estates Maintenance Programme	2.8	0.0	0.0	0.0	2.8
Strategic Regeneration - Lewisham Gateway	2.7	0.0	0.0	0.0	2.7
Strategic Regeneration - Catford Programme	11.4	1.2	1.0	0.7	14.4
Planning	0.2	0.0	0.0	0.0	0.2
Public Realm	0.1	0.1	0.1	0.0	0.2
Climate Resilience	0.2	0.0	0.0	0.0	0.2
LUF Programme - Public Realm	8.8	6.4	0.0	0.0	15.2
<b>Directorate Total</b>	<b>30.5</b>	<b>49.0</b>	<b>1.6</b>	<b>1.2</b>	<b>42.5</b>
<u>Directorate of Housing</u>					
General Fund Housing	48.1	35.7	3.3	7.3	94.4
Housing Services	3.1	3.7	3.9	1.2	12.0
<b>Directorate Total</b>	<b>51.2</b>	<b>39.4</b>	<b>7.2</b>	<b>8.5</b>	<b>106.4</b>
<b>Total GF</b>	<b>94.9</b>	<b>57.1</b>	<b>9.2</b>	<b>9.7</b>	<b>171.0</b>
<b>HRA:</b>					
Building for Lewisham Programme - HRA	22.3	63.7	34.4	0.0	120.4
HRA Capital Programme (Inc. Decent Homes)	82.5	66.3	50.8	50.7	250.4
Housing Management System	0.5	0.4	0.0	0.0	0.9
Aids & Adaptions	0.5	0.5	0.5	0.5	2.0
HRA Allowances for Buybacks & Brockley PFI	6.9	3.1	3.2	0.0	13.3
<b>Total HRA</b>	<b>112.8</b>	<b>134.2</b>	<b>88.9</b>	<b>51.2</b>	<b>387.0</b>
<b>Total Capital Programme</b>	<b>207.7</b>	<b>191.3</b>	<b>98.0</b>	<b>60.9</b>	<b>558.0</b>

- 11.10. The HRA figures in the above table differ from the figures presented in Appendix X7 in the HRA Business Plan. This is because the above table only includes schemes that have been approved by Mayor & Cabinet, whereas Appendix X7 includes both approved development schemes and unapproved pipeline development schemes.
- 11.11. Although the value of the overall Capital Programme will remain largely the same, the Capital Programme is subject to change for various reasons:

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- New schemes may be agreed and added to the programme throughout the remainder of 2023/24 and into future years, reflecting the work of ongoing capital re prioritisation.
  - The General Fund capital programme will need to adapt to reflect the priorities of the corporate strategy and the pressures of the Council’s building stock condition.
  - 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 2024/25 budget will be amended to include any 2023/24 outturn slippage.
- 11.12. 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.
- 11.13. The Financing of the 2024/25 to 2027/28 Capital Programme is set out in Table E4 below.

**Table E4: Proposed Capital Programme Financing 2024/25 to 2027/28**

	2024/25	2025/26	2026/27	2027/28	Total
	£m	£m	£m	£m	£m
<b>GF</b>					
Capital Receipts	0.9	1.1	0.5	1.8	4.3
Capital Reserves	2.7	0.8	0.0	0.0	3.5
CIL	1.3	2.5	0.0	0.0	3.8
Corporate Reserves	6.2	0.9	1.8	1.5	10.4
Grants	29.5	14.4	3.7	0.9	48.4
Prudential Borrowing	39.1	31.1	3.0	5.5	78.7
Revenue Contribution	0.0	0.0	0.0	0.0	0.0
RTB Receipts	8.2	4.3	0.0	0.0	12.5
S106	7.1	2.0	0.3	0.0	9.4
<b>Total GF</b>	<b>94.9</b>	<b>57.1</b>	<b>9.2</b>	<b>9.7</b>	<b>171.0</b>
<b>HRA</b>					
Major Repairs Reserve	26.7	27.2	27.7	28.2	109.8
Revenue Contribution	2.0	2.2	2.9	5.8	12.9
RTB	3.2	13.6	7.6	0.0	24.4
Grants	1.7	18.1	13.8	0.0	33.6
Prudential Borrowing	79.2	73.1	36.8	17.2	206.3
<b>Total HRA</b>	<b>112.8</b>	<b>134.2</b>	<b>88.8</b>	<b>51.2</b>	<b>387.0</b>
<b>Total Capital Programme</b>	<b>207.7</b>	<b>191.3</b>	<b>98.0</b>	<b>60.9</b>	<b>558.0</b>

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- 11.14. The financing breakdown for the General Fund is 54% internally, from either current reserves, anticipated receipts, and grants or contributions (including s106 & CIL) with the remaining 46% to be funded externally from borrowing.
- 11.15. The financing breakdown for the Housing Revenue Account is 47% internally, from either Grants, Right to Buy Receipts, HRA Revenue Contributions and the Major Repairs Reserve with the remaining 53% to be funded externally from borrowing.
- 11.16. The financing profile of the Capital Programme is flexible and may change as the Council is constantly looking for external funding opportunities such as additional grants and contributions.

### **Key Risks to the Capital Programme**

- 11.17. There are many risks to the Capital Programme, some of the key ones are listed below:
- Contractors going into administration and being unable to complete work on projects. This risk has become heightened due to some of the factors listed below. This risk has recently materialised in a number of schemes, most notably the Home Park & Edward Street housing schemes which have now been aborted for this reason, causing losses to the council.
  - Increased cost pressures caused by rising inflation rates, which may cause further change to scheme scope to meet with funding availability and could lead to contractors looking to renegotiate scheme costs.
  - Delays to projects caused by supply chain disruptions, labour shortages and other factors, which may cause costs to increase due to inflation or additional costs such as storage.
  - Council may need to make additional savings meaning certain schemes may need to be paused/aborted. This risk may become more prevalent as the Council is currently forecasting an overspend, and therefore will look to make savings to combat this.
  - A project may not deliver the expected benefits.
  - A project may not meet the criteria laid out in its funding requirements (for example grant funding with conditions attached), leading to a potential repayment of this funding. If this materialises then there is a possibility some or all of the funding would need to be repaid.
  - Competing priorities for limited resources requires statutory requirements (for example Health & Safety works or changes resulting from 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 recommendations to pause or abort schemes or for potential new schemes.
- 11.19. Mitigations, particularly around BfL programme, include:
- seeking opportunities to diversify product type (e.g. increasing number of shared ownership homes) and delivery approach (e.g. pursuing acquisitions and investment partnerships in place of direct delivery); and
  - continuing to seek additional funding opportunities such as the ability to combine RTB receipts with AHP funding as to reduce pressure on capital programme whilst securing greater delivery.



## Capital Programme Highlights

- 11.20. The paragraphs below set out further details on some of the major capital projects / programmes in the capital programme by directorate.

### Directorate of Corporate Resources

- 11.21. *ICT – Tech Refresh*: The Resources Directorate’s capital programme currently has a small allocation of approximately of approximately £0.6M earmarked to fund the completion of the Tech refresh project. The capital programme does not include any allocation for further ICT or Tech refreshes within the current MTFS period.

### Directorate of Community Services

- 11.22. *Levelling Up Fund – Cultural Hub*: In June 2022 Mayor and Cabinet approved the submission of a bid to the Government’s Levelling Up Fund for Lewisham Town Centre. In early 2023 the Government approved the bid for £19m of Levelling Up Fund with match funding of £5m from the Council. All £24m is capital funding. The bid consists of three projects, one of which is the transformation of Lewisham Library into a Culture and Business Hub. This project has funding of £8m and is currently in planning with works due to start in 2024/25.

### Directorate of Children and Young People (CYP)

- 11.23. The CYP capital programme comprises a range of projects across two main programme areas – Pupil Places Programme and Schools Minor Capital Works Programme. Both programmes are largely funded through grants.
- 11.24. *School Minor Works Programme*: The School Minor Works Programme is an annual programme of urgent capital infrastructure projects carried out across the borough’s school estate. Works in 2023/24 took place at eleven different school sites and included roof replacements; drainage works; heating and hot water system upgrades, and toilet refurbishment. A new programme of works for 2024/25 will be developed early in 2024 and will include any historic carry forward of unspent allocation plus the 2024/25 allocation.
- 11.25. *Pupil Places Programme*: The focus of this programme is now on provision of Special Educational Needs and Disabilities places across the borough. In 2023/24 works are being carried out to incorporate SEND ‘Resource Bases’ into five existing mainstream schools, and the permanent Watergate expansion project is currently in the design stage and due to start onsite early in 2024. An estimated £8.6m of spend is forecast for the MTFS period, the majority of which will cover the Watergate School expansion works.

### Directorate of Place

- 11.26. The Place element of the capital programme includes a number of projects / programmes across the core areas of Highways, corporate assets and strategic regeneration. The section below provides a summary narrative of some of the core projects within the Place directorate.
- 11.27. *Highways*: The Highways programme delivers works covering carriageway resurfacing, bridges and footway works. A new programme of works will be worked on in early 2024 and will include an annual allocation from TfL, as well as other works which will be funded through earmarked reserves.

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11.28. *Asset Management Programme (AMP) (Reactive / Unplanned Works)*: Funding from the Asset Management Programme (AMP) has continued to support reactive and much needed capital works across the operational corporate estate of 85 buildings including buildings in the Catford complex. Reactive works are undertaken by the Facilities Management team covering three key areas: fabric, mechanical and engineering (M&E) and residual or H&S related.

11.29. *Corporate Estate Management Programme (CEMP) (Planned Works)*: A new programme of planned lifecycle capital works across the operation estate began in 2021/22 following a condition survey of the estate. The programme, Corporate Estate Maintenance Programme (CEMP), is designed to ensure that the council's assets are invested in and are fit for purpose. Benefits include less interruptions to critical operations due to building or equipment failure, longer asset life, improved efficiency and energy performance, increased safety and compliance, and reduced repair costs. The current programme will deliver improvements to around 32 assets; covering a vast array of repairs and improvements, all of which seek to ensure the buildings are safe, watertight, and fit for purpose for the services being delivered from them. This includes new roofs, new windows, damp and drainage work, improved working conditions for frontline staff, mechanical and electrical improvements, and general decorations.

There is a requirement for a further £5.1m ((2024/25 – £1.8M; 2025/26 – £0.8M; and 2026/27 – £2.4M) funding for the CEMP for the current MTFs (through to 2027/28) to enable continued planned maintenance across the council's corporate estate, however this has not currently been included in the proposed Capital Programme above. We are funding these from reserves so does not impact wider financing considerations.

11.30. *Strategic Regeneration - Catford Town Centre*: In July 2021 Mayor and Cabinet endorsed the Catford Town Centre Framework, which sets out the council's regeneration aspirations for the town centre. This includes a number of early deliverables which form 'phase 1' and plans to redevelop council assets, including Laurence House, the Old Town Hall and Civic Suite, Milford Towers and the shopping centre.

The realignment of the A205 and improvements to the A21 also form part of phase 1. The council has secured £10M Housing Infrastructure Fund grant to support the road scheme and is expecting to make a contribution of up to £3.7m from Community Infrastructure Levy. This contribution will be match funded by TfL. The remaining funding of c. £44M is anticipated to come from Department for Transport's Major Road Network fund, for which TfL are currently progressing a business case application. The council forecasts spend of c.£2M in 23/24 funded via the HIF.

The road realignment creates significant open space in the town centre which will be owned by the council. Initial design work will be paid for by the HIF but further capital expenditure of c.£4.5m will be required to develop the design and deliver the public realm scheme once the road completes. Further funding will need to be identified to cover these costs.

11.31. *Levelling Up Fund – Lewisham Town Centre*: As mentioned in section 1.22.1, in June 2022 Mayor and Cabinet approved the submission of a bid to the Government's Levelling Up Fund for Lewisham Town Centre. In early 2023 the Government approved the bid for £19m of Levelling Up Fund with match funding of £5m from the Council. All £24m is capital funding. The Place elements of this programme will deliver a revitalisation of Lewisham Street Market and improvements to the public. These two elements of the bid have a budget of £16m and are currently in the planning stage, with works anticipated to start in 2024/25.

Directorate of Housing

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- 11.32. *Housing Services - Disabled Facilities Grant (DFG)*: The DFG is a capital grant contributing to the cost of home adaptations, to enable eligible disabled people to continue living safely and independently. The Council carried forward £2.1m of unspent grant into 2023/24 and was also awarded an additional £1.6m. The forecast spend for 2023/24 is £1m, meaning that the forecast carryover is £2.7m. This carryover combined with an anticipated further £6m allocated across the MTFS period, means the council has budget over £8m worth of spend across the next 4 years.
- 11.33. *General Fund Housing*: The General Fund housing scheme delivers temporary accommodation for the Building for Lewisham Programme and facilitates regeneration schemes through land assembly. So far 54 temporary new homes have been created under the scheme and a new scheme was approved by Cabinet in March 2023, to purchase 300 properties for temporary accommodation to deal with pressures in the service. Six additional temporary accommodation homes are also in the planning phase.

### HRA

- 11.34. *BfL*: The Building for Lewisham Programme was agreed by Mayor and Cabinet in January 2020. Since that time the programme has slipped and been adversely affected by COVID 19, high build cost inflation, contractor insolvency and increased interest rates. For schemes in planning and pipeline phases, there has been a review to put some schemes on hold due to viability issues. Delivering the programme as a whole has involved a change of tenure mix to improve viability. The HRA is in need of additional capacity and therefore the -£20m NPV previously agreed for the Building For Lewisham Programme will need to reduce to -£10m NPV to ensure that the HRA has sufficient reserves. For the HRA, 262 new homes have been delivered and a further 97 are on site. Schemes in the planning and pipeline phases amount to a further 851 new homes and will be required to reduce the NPV within the revised limit.
- 11.35. *HRA Capital Programme (Inc. Decent Homes)*: This budget is for works to ensure council owned stock is brought up to and maintained to a decent level, covering both internal and external works. This includes works for damp & disrepair, building safety, refurbishment, and others.
- 11.36. Further detail on the HRA Capital Programme can be found in Section 9 of this report, along with Appendices X1-X7.

### **Capital Strategy**

- 11.37. The Council's Capital strategy and priorities drive the Proposed Capital Programme set out in this section of the report. The Capital Strategy & suggested Capital Programme beyond the current MTFS period are detailed in Appendix W1.

### **Recommendation**

- 11.38. It is recommended that M&C note the Capital Programme position and recommend that Council approve the 2024/25 to 2027/28 Capital Programme of £559.5m.

## 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 representatives. A meeting on the 13<sup>th</sup> of November 2023 presented tenant and leasehold representatives with an opportunity to consider the position and to feedback any views to Mayor & Cabinet. Tenant representatives of Brockley attended a meeting on 2<sup>nd</sup> of November 2023 to consider the proposals and feedback comments to Mayor & Cabinet.
- 12.3. Details of comments from the residents' meetings, and officers responses to these, have been set out in Appendices X1 and X2.

### **Business Ratepayers Consultation**

- 12.4. Representatives of business ratepayers were consulted online on the Council's indicative net revenue budget between 1 December and 31 December 2023. This consultation was open to all of the over 10,000 businesses registered in Lewisham.
- 12.5. There were 26 respondents, of which 25 answered a few simple questions to better understand the nature of their business operations. They then provided feedback on the Council's corporate priorities, on what the Council does well and on what the Council could do better.
- 12.6. Of the 26 responses to the consultation, 20 confirmed that they were paying business rates. Most of the respondents also provided information on specific details as outlined in Table F1 below.

**Table F1: Information Provided by Business Ratepayer Consultation Respondents**

	Number of Respondents
<b>Type of business operated</b>	
Large Enterprise	0
SME*	11
Micro-enterprise**	12
Charity/Community/Voluntary Sector Organisation	2
<b>Total respondents</b>	<b>25</b>
<b>Business rates relief</b>	
Receiving business rates relief	19
Not receiving business rates relief	6
<b>Total respondents</b>	<b>25</b>

\* Small to medium sized enterprises.

\*\* Including sole traders and partnerships.

- 12.7. When asked which of the Council's seven priorities they valued the most, most of the respondents answered this and a strong local economy was voted as the most valued. The priorities are outlined in more detail in Section 3 of this report. Table F2 below shows how the respondents voted in more detail.

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**Table F2: Rankings of the Corporate Priorities by Business Ratepayer Consultation Respondents**

Corporate Priority	Number of Respondent Votes			Overall Ranking
	Most Valued Priority	Second Most Valued Priority	Third Most Valued Priority	
A Strong Local Economy	10	4	2	1st
Children & Young People	2	5	2	5th
Cleaner & Greener	2	6	2	4th
Health & Wellbeing	2	6	4	3rd
Open Lewisham	1	0	1	7th
Quality Housing	2	0	1	6th
Safer Communities	5	2	10	2nd
<b>Total Votes</b>	<b>24</b>	<b>23</b>	<b>22</b>	

- 12.8. See Appendix Y3 to show how each of the corporate priorities are being supported within the Council's budget.

#### **What Lewisham Does Well**

- 12.9. The consultation asked business ratepayers what they believe the Council does well. Of the respondents, 17 provided feedback to this question.

##### Public Realm – Waste

- 12.10. Several respondents gave positive feedback regarding the Council's waste services. One particular respondent wrote that commercial waste collection is always on time and that the Council refuse teams 'go the extra mile' to ensure no waste is left behind during their collections.

##### Inclusive Regeneration

- 12.11. Positive feedback was given around project growth within the Borough. The respondents made comment towards the Council's investment in Lewisham High Street, and how this allows local businesses to thrive, therefore promoting a strong local economy.
- 12.12. One respondent also advised that the strong communication channels of the Council with local businesses has made them aware of opportunities for their business.

##### Community, Partnerships & Leisure

- 12.13. A number of respondents give positive feedback regarding the green spaces within the Borough. In particular, one respondent commented that our green spaces are valued and well maintained, whilst another positively commented on how these spaces are redeveloped when unused or of poor quality.
- 12.14. Other areas mentioned within the feedback to this question included environmental policies, diversity, recycling, and the arts.

#### **What Lewisham Could do Better**

- 12.15. The consultation asked business ratepayers what they think the Council could improve on. Of the respondents, 21 provided feedback to this question.

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### Public Realm – Waste

- 12.16. A number of respondents raised concerns related to Waste Services within the Borough.
- 12.17. More specifically, one respondent raised the concern of a lack of public litter bins around Deptford High Steet and New Cross Station.
- 12.18. The Director for Public Realm notes these comments and advises that the areas will be reviewed, and action will be taken if needed.
- 12.19. A number of concerns were raised relating to the cleanliness of the streets around the Borough, as well as around fly tipping, graffiti and public park rubbish collection.
- 12.20. The Director for Public Realm notes these comments also. The Council will continue to clean streets and take action on fly-tipping when identified or when reported via the Council's website. The Council regularly sweeps the streets and is also currently reviewing the public bin provision around the Borough. The presence of fly-tipping, along with other street-cleaning issues, can also be reported via the Love Clean Streets website or app. Further information on this can be found on the Council's website; <https://lewisham.gov.uk/myservices/recycling-and-rubbish/cleaner-lewisham>

### Public Realm – Highways & Streetscene

- 12.21. Feedback was given related to the current level of road traffic within the Borough and the negative impact this is having on client footfall in central Lewisham. Respondents also suggested the need for more cycling routes and more emphasis on the safety of cyclists. They would also like to see more encouragement from the Council for residents to choose cycling or walking where possible over other transportation options.
- 12.22. The Director for Public Realm notes these comments. The Council continues to encourage more sustainable transport through investment in cycling and walking schemes, with cycling facilities and cycle routes, and schemes to reduce traffic dominance. The Council is also investing in agreements with dockless bicycle hire operators.
- 12.23. Programmes such as the Sustainable Streets programme are aimed at addressing concerns such as these. More information on this programme can be found on the Council's website; <https://lewisham.gov.uk/myservices/roads-and-transport/sustainable-streets-programme>

### Public Realm – Parking

- 12.24. One particular respondent suggested the idea of a local trader permit when providing feedback to the question. This respondent feels they lose revenue appealing penalty charge notices.
- 12.25. The Director for Public Realm notes these comments. The Council has been working with its parking contractor to allow local businesses to take cash for short term parking, and the council has a programme to review all current controlled parking zones which will also help with business needs.

### Inclusive Regeneration – Business & Partnership

- 12.26. The respondents addressed support for creative businesses, support for local SMEs, attracting new businesses, working with businesses and organisations which are Black and Multi-Ethnic led and how we fill vacant shops and offices in the Borough.

- 12.27. The Executive Director for Place notes these comments. There is support for growing a thriving business base in the Borough and for providing support to Lewisham based businesses to grow and succeed. The Council's UK Shared Prosperity Fund grant programmes were launched in September 2022 and are live on the Council's website. These include our Empty Property Grants that businesses can apply for when signing a new lease for a vacant high-street unit and aims to encourage less vacant commercial premises on our high streets. We have also launched a fund aimed specifically at creating more affordable workspace for arts and creative businesses. We also continue to support the Borough's Creative Enterprise Zone through 'SHAPESLewisham'. The website can be found here; <https://www.shapeslewisham.co.uk/>
- 12.28. In January 2022 the Council undertook a survey of 550 independent high-street businesses. It was the first survey of this kind to look at the ethnicity of business owners to best support the diversity of our high streets. We continue to deliver a support package for local businesses looking to grow or make those first steps, and will continue to provide support which champions a business base as diverse as our residents. The high street survey showed us that seven in ten independent business owners rate Lewisham as an excellent place to do business and there is long term confidence. We hope this message attracts more businesses to the Borough. We are pleased to see that there have been 4,000 more jobs registered in the Borough of Lewisham since 2020.

#### Community, Partnerships & Leisure – Arts Funding

- 12.29. A number of comments were made relating to arts businesses in the Borough and the hope for more funding in this area.
- 12.30. The Director for Communities, Partnerships & Leisure notes these comments. Lewisham's annual reign as the London Borough of Culture enabled an investment of approximately £4m in arts and culture in Lewisham and the legacy is wide reaching, including a 5-year Cultural Strategy named 'We Are Lewisham – A Cultural Strategy for Lewisham 2023-2028'. A Lewisham Cultural Partnership has been formed to oversee the action planning linked to this strategy.
- 12.31. The Council continue to invest in multi-year core funding through its Main Grant programme (2022-2025) and it directly funds to 12 arts organisations that tackle inequality and barriers to participation in arts and culture, allowing further investment through organisations individual fundraising capabilities. The Main Grant programme also funds Fundraising Development Manager posts, managed by the sector, one of whom has an arts fundraising specialism and supports inward investment for Lewisham based organisations.

#### Planning – Housing

- 12.32. Feedback was given by respondents in relation to the creation of new affordable homes and "ensuring housing investors are controlled".
- 12.33. The Interim Director for Planning notes these comments. For new housing developments, developers are required to provide new affordable homes as part of the scheme. This is enshrined in planning policy including the latest Local Plan which has been formally submitted to the Secretary of State (through the Planning Inspectorate) for Examination in Public. The council maintains a brown field register which identifies sites suitable for development which includes a considerable number of smaller sites. This list is updated and published annually.
- 12.34. Developers are required to comply with current national planning policy and local planning policy. Each planning application is assessed on whether the scheme is

acceptable in policy terms and development schemes are vetted to establish whether there is a need to improve elements such as affordable homes, transport and highway infrastructure, air quality, open space and school improvements. The scale of this will depend on the nature of the development and developers are encouraged to engage the local community at the early stages of the development prior to a planning application being submitted as well as engaging the local planning authority who can guide the development and establish the level of community benefits. The requirements identified are then controlled by planning conditions and/or by way of a legal agreement with the developer.

#### Resident & Business Services

- 12.35. Feedback was given around the difficulties some respondents have in contacting the Council.
- 12.36. The Director for Resident and Business Services notes these comments. The Revenue and Benefits Service has limited telephone access, but this is in line with the potential number of clients, outstanding work, and demand. The service currently has open telephone lines for 12 hours per week, these being Monday, Tuesday, Thursday, and Friday between 9.00am and 12.00pm. The contact number is 020 8314 6150.
- 12.37. Performance is significantly above target with the service answering 93% of 330 calls and 94% of 294 calls received in the last two months. Summons surgeries are also offered all day on Wednesdays. In addition, there are a number of on-line options available where customers can access information to help them with enquiries but are also offered the option to submit enquiries for information.

#### Business Rates

- 12.38. Finally, respondents suggested that business rates should be reduced generally and there should be more access to grants.
- 12.39. 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 is 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](http://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**

- 12.40. The consultation was available to all of the businesses registered in Lewisham and 26 responses were received.
- 12.41. 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.
- 12.42. There were also a number of comments provided on the General Fund services affecting businesses in the form of street cleansing, safe streets, housing and arts and culture 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 strong local economy.

### **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. The setting of the budget is a matter for the Council, having considered recommendations by Mayor and Cabinet. The Council's budget-setting process is set out in its Constitution.
- 14.2. The Council is obliged by section 151 of the Local Government Act 1972 to make proper arrangements for the management of its financial affairs. It must set and maintain a balanced budget each year. The Local Government Act 2003 introduced a prudential system of financial control whereby the Council is free to borrow or invest so long as its capital spending plans are affordable, prudent, and sustainable. The Council must determine and keep under review how much it 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 must consider affordability, prudence, and sustainability, value for money, stewardship of assets, service objectives, and practicality. Members are also 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. Furthermore, section 3 of the Local Government Act 1999 places the Council under a duty to secure continuous improvement in the way its functions are exercised, having regard to a combination of economy, efficiency, and effectiveness. Members must have regard to this duty in making decisions in relation to this report.
- 14.3. Where a service is provided pursuant to a statutory duty, the Council cannot fail to discharge it properly. Where there is discretion as to how to discharge duties, that discretion should be exercised reasonably.
- 14.4. The Council is required by section 33 of the Local Government Finance Act 1992 to calculate for each financial year the basic amount of its Council Tax. The basic amount of Council Tax must be calculated from the Council Tax base. This base is created by applying a prescribed formula under the Local Authorities (Calculation of Council Tax Base) Regulations 2012. The Council is required to submit its Council Tax base to the GLA between 1 December and 31 January in the financial year preceding the financial year for which the calculation of Council Tax base is made. If it fails to do so, then the GLA is required to determine the calculation for itself, in the manner prescribed in the above Regulations. The amount of Council Tax must be sufficient to meet the Council's legal and financial commitments, ensure the proper discharge of its statutory duties and lead to a balanced budget.
- 14.5. Members should have regard to s106 of the Local Government Finance Act 1992 which provides that members who are in arrears on their Council Tax for two or more months may not vote on matters concerning the level of Council Tax or the administration of it.
- 14.6. Under sections 74 and 75 of the Local Government and Housing Act 1989, the Council is obliged to maintain a separate HRA and prevent a debit balance on that account. Rents must therefore be set to avoid such a debit. Section 24 of the Housing Act 1985 allows the Council to make such reasonable charges as they determine for the tenancy

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or occupation of their houses. The Council must review rents from time to time and make such charges as circumstances require. 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; provide sufficient information to explain the variation and give tenants an opportunity to serve a Notice to Quit ending their tenancy

- 14.7. The Council has carried out budget consultation as set out in this report. Members must consider consultation responses with an open mind before making any decision. The Council should also consider how its decisions will contribute towards meeting its equalities duties, against other relevant circumstances such as economic and practical considerations. Directorates should undertake detailed impact assessments of major proposals to ensure that any proposals for savings are reasonable and meet Equality Act duties.

## 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; and
  - 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 <https://www.equalityhumanrights.com/guidance/public-sector>
- 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 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/guidance/public-sector-equality-duty-psed>
  - 15.7. The EHRC has also issued Guidance entitled “Making Fair Financial Decisions”. It appears at Appendix Y10, 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.
  - 15.11. In considering the formation of the 2024/25 Budget it is important to consider how this has changed from the 2023/24, both the impact of each individual budget reduction and budget growth proposal, as well as the cumulative impact of these changes on those with protected characteristics. For each reduction and growth proposal an initial equalities analysis assessment has been undertaken, and a fuller equalities impact assessment where required. The detail of each of these is contained in Appendices Y2a and Y2b, and the summary assessments in Appendices Y9a and Y9b.

## **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 services funded either from agreed reductions or pressures funded. The environment considerations for any reductions were specifically considered as part of those proposal. The environment considerations for the pressures to be funded in 2023/24 are generally considered to be positive.

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## 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

Short Title of Report	Date	Location	Contact
Medium Term Financial Strategy	19 July 2023 (M&C)	1 <sup>st</sup> Floor Laurence House	David Austin
Medium Term Financial Strategy Update	30 November 2023 (PASC)	1 <sup>st</sup> Floor Laurence House	David Austin
Council Tax Base	17 January 2024 (Council)	1 <sup>st</sup> 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.

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## 21. Report Author and Contact

David Austin – the Executive Director for Corporate Resources  
([david.austin@lewisham.gov.uk](mailto:david.austin@lewisham.gov.uk))

Katharine Nidd – Director of Finance ([katharine.nidd@lewisham.gov.uk](mailto: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.

## 22. Appendices

### Capital Programme

W1 Capital Strategy

### Housing Revenue Account

X1 Brockley Residents Feedback and Queries Relating to the Rent and Service Charges Proposed Increase for 2024/25

X2a Brockley Rent Increase Proposal Report 2024/25

X2b Regenter Service Charge Proposal Report 2024/25

X3 Rent and Service Charge Increase Proposal Report LBL 2024/25

X4 Garage Rent Increase 2024/25

X5 Former Tenant Arrears Write Offs

X6 Other Associated Charge 2024/25

X7 HRA Business Plan

### General Fund

Y1 Summary of Previously Agreed Budget Reduction Proposals for 2024/25

Y2a Budget Reduction Proposals for 2024/25 (Member Decisions)

Y2b Budget Reduction Proposals for 2024/25 (Officer Decisions)

Y3 2024/25 Budget by Corporate Priority

Y4 Ready Reckoner for Council Tax 2024/25

Y5 Chief Financial Officer's Section 25 Statement

Y6 Council Tax and Statutory Calculations

Y7 Summary of Proposed Budget Pressures to be Funded in 2024/25

Y8 2024/25 Proposed Fees and Charges

Y9a 2024/25 Budget Reductions and Growth Equalities Impact Assessment (EIA): Budget Reductions EIA

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Y9b 2024/25 Budget Reductions and Growth Equalities Impact Assessment (EIA):  
Budget Growth EIA

Y10 Making Fair Financial Decisions

### **Treasury Management**

Z1 Interest Rate Forecasts 2024-2026

Z2 Extract from Credit Worthiness Policy

Z3 Benchmarking Extract

Z4 Economic Update from Link Asset Services

Z5 Approved Countries for Investment

Z6 Requirement of the CIPFA Treasury Management Code of Practice

### APPENDIX W1: Capital Strategy 2024/25

#### Capital Strategy

- 1.1. The Council's Capital strategy and priorities drive the Proposed Capital Programme set out in this section of the report. The Capital Strategy & suggested Capital Programme consider Capital requirements beyond the current MTFs period.
- 1.2. The purpose of the Capital Strategy is to drive the authority's capital investment ambition whilst also ensuring appropriate capital expenditure, capital financing and treasury management within the context of the sustainable, long-term delivery of services. The Capital Strategy supports the Corporate Plan, which sets out the Council's ambitions and how we will achieve them. The Capital Strategy in turn is informed by a range of strategic Council documents, which include the Infrastructure Delivery Plan to the Draft Local Plan, the Asset Management Strategy, the Housing Strategy, and the Climate Emergency Action Plan.
- 1.3. The Capital programme's ability to respond to the Council's strategic objectives will require prioritisation of funding and financing, supported by robust business cases. The Capital Strategy will seek to ensure that the Capital Programme is optimised to ensure alignment of spend to address pressures on General Fund revenue resource. This will also require a prioritisation of the use of grant, s106 and Strategic Community Infrastructure Levy where appropriate.
- 1.4. The narrative below sets out key considerations for the Council's capital programme beyond the MTFs period. Similarly to the Capital Strategy, the HRA section of the Capital Programme is determined by the HRA business plan. This is detailed in Section 11 of this report.

#### Asset Base:

- 1.5. The Council owns a diverse range of land and property assets that make an important and positive contribution to the borough. These are mainly used in the delivery of day-to-day council services and housing, while others are held for investment or future regeneration opportunities, or as contributors of value to the provision of public services. Altogether, the Council's fixed asset base, made up of property, plant and equipment, is currently valued at £2.844billion of which £1.475billion are housing assets.
- 1.6. The property asset base is generally accounted for in two core areas: Housing Revenue Accounts (HRA) or housing portfolio and General Fund (GF) or non-housing portfolio. There are approximately 19,800 individually tenanted units within the HRA portfolio and 870 assets in the General Fund or non-housing portfolio. This is in addition to approximately 1900 garage units across the portfolio.
- 1.7. The non-housing portfolio includes assets mainly used to deliver the Council's civic functions (offices, libraries, depot, hostels etc), help discharge statutory obligations (e.g., schools), generate revenue income stream (retail units, light industrial sites etc) and help deliver specific corporate objectives. These assets are held and accounted for by the various services and directorates using them.
- 1.8. In addition to the land and property assets, the Council is also responsible for managing and maintaining 392km of public road network. The Council's responsibilities include

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ensuring highway assets are compliant, fit for purpose and fulfil their functions in an efficient and sustainable manner.

1.9. The asset base is a major resource that is integral to the Council's Corporate Strategy objectives and the delivery of services. To that end, work is ongoing to develop a cross directorate Asset Management Strategy (AMS) to provide a framework for the effective use and management of the Council's property assets. The framework will support the Council in achieving the key priorities set out in the Corporate Strategy 2022-26 by providing a structure and understanding of what role the Council's property portfolio can play. It is intended to be an agile framework to support future service needs, whilst ensuring that priorities for investment, maintenance or rationalisation of assets are identified.

1.10. Amongst other things, the strategy aims to:

- ensure property and land assets support the borough's Corporate Strategy 2022-2026.
- Provide greater understanding of the Council's asset base, its challenges and opportunities.
- to create a strategic framework for asset management to enable sound decision-making about the future use of Council assets.
- to ensure Council assets are fit for purpose, compliant, low or zero-carbon and accessible.
- to maximise income opportunities and reduce financial liability of Council assets.
- to adopt a One Public Estate approach to ensure wider use of the public sector estate for public good.
- provide context and support decisions about prioritising capital investment and development of a Capital Strategy.
- to support decision-making about investment and disposal of Council land and property, to rationalise the estate and deliver Council priorities and services.
- to support the Council in ensuring sufficient land to deliver housing and supported housing programmes.
- to support economic growth and regeneration across Lewisham.

1.11. In parallel to the development of the strategy, is ongoing work on the delivery of a Corporate Estate Maintenance Programme (CEMP) which seeks to invest in and maintain the Council's operational asset base to support longer asset life, improve efficiency and energy performance, increase safety and compliance, reduce repair costs and reduce interruptions to critical operations due to building or equipment failure. This programme is in response to a 2019 asset condition survey of the operational estate. A new condition survey will be undertaken in 2025/26 to capture a more detailed understanding of the condition of all assets including operating cost over a 10-year period for both building fabric and mechanical and electrical components.

1.12. The CEMP is also closely aligned with the Asset Review process which looks to identify prioritised opportunities for better utilisation of the Council's assets, land supply for housing development and to enable service transformation. This is necessary because, as the requirements of the Council evolve, there will undoubtedly be significant opportunities to rationalise land and property as improvements in service design and

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delivery are realised. Rationalisation may also give rise to opportunities for disposal and generation of capital receipts for reinvestment in the capital programme and furtherance of other Council objectives.

- 1.13. The Council's asset base is in need of transformation and rationalisation to ensure it is fit purpose and support the effective and efficient delivery of services. This transformation will occur during this Capital Strategy period and it likely to require a level of investment in the Council's assets that exceeds that which is currently allowed for in the budget Capital programme. Much of this investment is likely to need to be focussed on the Council's civic campus in Catford, where there remains an ambition to realise a new facility mix as part of the town centre framework. As yet, the Council has not made a decision on the delivery mechanism for this. The estimated capital programme, set out below, recognises that there is not yet a Council adopted delivery strategy for its civic assets but does recognise the existing asset base to require life cycle investment over the strategy period.

### Placemaking and Town Centre Regeneration:

- 1.14. The ambition proposed in the Catford Town Centre Framework is expected to be delivered over the next 20 years or so. The council has procured advice to support the review of delivery options for the council's landholdings within the Framework area. This work is highlighting a number of additional workstreams it would be prudent for the council to undertake, including further work on the proposed public sector campus which includes new council and civic offices.
- 1.15. The delivery of the Framework will create requirements for additional Council financial capacity, including land assembly, managing of the outstanding CRPL debt, meeting the costs of new civic accommodation and the resourcing and consultancy costs to support the chosen delivery route. The value of these asks will be dependent on the delivery route which the council chooses to take in due course. As the programme will likely be 20 years or so, many of these costs will sit beyond the current MTFS period, however, it is expected that resource and consultancy costs of c.£2m will be required in the next few years to support delivery.
- 1.16. The Council's town centre framework sets ambitious objectives for the delivery of affordable housing and civic provision, which present viability challenges in current market conditions. Therefore, there is a risk that the delivery of the framework ambition has implications limits the Council's ability to recover the current loan to CRPL. There are outstanding land assembly challenges to the delivery of the framework objectives. These impacts are not assumed within the Council's current budget and will be the subject of separate Mayor and Cabinet consideration as the Catford delivery business case is further developed.
- 1.17. The realignment of the A205 and improvements form part of the existing capital programme and the majority funding is anticipated to come from Department for Transport's Major Road Network fund, for which TfL are currently progressing a business case application. However, the road realignment creates significant open space in the town centre which will be owned by the Council. An interim scheme will be delivered shortly after the closure of the existing A205 which has an estimated cost of c.£2.5m.

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Further funding will need to be identified to cover these costs. A further permanent scheme will be delivered following the completion of the Civic Suite and Laurence House sites. High level estimates show further capital expenditure of £4.5m would be required. It is expected this would be funded through s106 contributions.

### Housing Development:

- 1.18. The Council's Housing development programme has been significantly impacted by cost inflation, increases in the cost of borrowing and supply side constraints over the recent period. As a result, the capacity for continued delivery will be driven by HRA capacity and the investment needs of the existing housing stock. Therefore, alternative delivery approaches and additional funding sources will continue to be explored. As will opportunities to diversify delivery approaches, using grant fund and land to create new capacity that is less reliant on HRA capital capacity. This approach will continue to need to reflect market conditions.
- 1.19. Delivery of the existing programme of new builds and acquisitions will support HRA revenue realisation and the ability to provide decant capacity for any stock that reaches end of life.
- 1.20. Wider considerations for future new housing delivery are set out in the HRA business plan.

### Net Zero Carbon:

- 1.21. Lewisham Council published a Climate Emergency Action Plan in 2020 setting out plans to deliver on the ambition for the borough to be net zero by 2030. This Action Plan was informed by a consultancy study (Aether 2019) identifying the actions required to achieve net zero in Lewisham, which calculated a requirement for an additional £1.6bn expenditure up to 2030. This estimate is caveated in that many of the technical solutions remain undefined or under-developed and therefore cannot be reliably costed. In addition, since 2019 construction and other costs have increased significantly. It is therefore likely that this estimate of £1.6bn is a considerable under-estimate. London Councils Climate Programme Implementation Plan (2023) identified a cost of £49bn to retrofit all of London's 3.8 million properties to EPC B. Nationally the Office for Budget Responsibility has estimated it will cost the UK £1.4tn by 2050 to eliminate all domestically produced greenhouse gases, or 0.6% of GDP per year (£417b by 2050) once the financial benefits to households are factored in.
- 1.22. Local authorities have no capacity to meet these costs, and Lewisham Council has made no commitment to deliver net zero regardless of cost or be the funder of last resort where mechanisms do not currently exist. The Council is working with partners regionally and nationally to call for more investment from the public and private sector and in addition Lewisham is seeking to find creative solutions to unlock funding opportunities including government grants, new investment models to attract external finance, the climate action investment fund and other opportunities.
- 1.23. Although the Council does not have responsibility for meeting the additional costs of decarbonisation, responding to the ambition for the borough to be net zero carbon has the potential to achieve a range of benefits alongside decarbonisation, such as reduced operational costs through reduced energy consumption, improved performance of

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buildings for staff and service users, the creation of local economic opportunities and reduced pressures on the public sector through improved health outcomes.

- 1.24. There are a wide range of emission sources in the borough, and for the large part, the Council's role is to work in partnership to influence and encourage action. However, the Council is directly responsible for around 15% of the scope 1 and 2 emissions as measured by the Government's local emissions data, with the sources of this being corporate buildings, schools, fleet, and the housing owned and managed by the Council. The total capital cost of decarbonising each of these sources is extensive and subject to ongoing work to develop clearer costs, business cases and funding models. The forthcoming revisions to the Climate Emergency Action Plan commit the Council to developing a costed plan for each source. All current external funding requires significant contributions of match funding and without dedicated support from the Council's own capital programme there will be a growing gap between the stated ambition of net zero by 2030 and the Council's ability to translate that into operational action.

### Estimated Capital Programme 2024/25 to 2033/34

- 1.25. The below table shows a current best estimate for the Capital Programme over the MTFS period & for the 5-year period beyond this. Note that the estimated budget values for the current MTFS period differ from those in the Proposed Capital Programme 2024/25 to 2027/28 in E4. This is because the below table includes pipeline schemes as well as schemes using anticipated, but not yet confirmed, funding such as the Schools Minor Works Programme and the Highways & Bridges – TfL schemes.

**Table W1.1: Capital Programme 2024/25 to 2033/34**

	2024/25 Budget	2025/26 Budget	2026/27 Budget	2027/28 Budget	2028/29 Budget	2029/30 - 2033/34 Budget	Total Budget
	£m	£m	£m	£m	£m	£m	£m
<b>GF:</b>							
<b>Resources</b>							
ICT - Tech Refresh	0.6	0.0	0.0	0.0	0.0	0.0	0.6
<b>Total Resources</b>	<b>0.6</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.6</b>
<b>Community</b>							
Safer Communities	0.2	0.0	0.0	0.0	0.0	0.0	0.2
Parks, Sports, and Leisure	0.1	0.0	0.0	0.0	0.0	0.0	0.1
Beckenham Place Park (Inc. Eastern Part)	0.4	0.0	0.0	0.0	0.0	0.0	0.4
LUF Programme - Cultural Hub	2.7	4.8	0.2	0.0	0.0	0.0	7.7
<b>Total Community</b>	<b>3.4</b>	<b>4.8</b>	<b>0.2</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>8.4</b>
<b>CYP</b>							
CYP - Other	0.3	0.0	0.0	0.0	0.0	0.0	0.3
Education Services - School Places Programme	4.6	3.8	10.2	11.0	0.0	0.0	29.6
Education Services - School Minor Works Programme	3.2	4.0	4.1	4.1	4.2	21	40.6

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Children's Social Care	0.3	0.0	0.0	0.0	0.0	0.0	0.3
Families, Quality and Commissioning - Youth Service	0.7	0.0	0.0	0.0	0.0	0.0	0.7
<b>Total CYP</b>	<b>9.1</b>	<b>7.8</b>	<b>14.3</b>	<b>15.1</b>	<b>4.2</b>	<b>21.0</b>	<b>71.5</b>
<b>Place</b>							
Highways & Bridges – TfL	1.0	1.0	1.0	1.0	1.0	5.0	10.0
Highways & Bridges – LBL	1.6	2.5	2.5	2.5	2.5	12.5	24.1
Asset Management Programme	3.8	1.3	0.5	0.5	0.5	2.5	9.1
Corporate Estates Maintenance Programme	2.8	1.5	1.7	1.9	3.6	16.5	28.0
Strategic Regeneration - Lewisham Gateway	2.7	0.0	0.0	0.0	0.0	0.0	2.7
Strategic Regeneration - Catford Programme	11.4	3.0	3.3	0.7	1.8	2.5	22.7
Planning	0.2	0.0	0.0	0.0	0.0	0.0	0.2
Public Realm	0.1	0.1	0.1	0.0	0.0	0.0	0.3
Climate Resilience	0.2	0.0	0.0	0.0	0.0	0.0	0.2
LUF Programme - Public Realm	8.8	6.4	0.0	0.0	0.0	0.0	15.2
<b>Total Place</b>	<b>32.6</b>	<b>15.8</b>	<b>9.1</b>	<b>6.6</b>	<b>9.4</b>	<b>39.0</b>	<b>112.5</b>
<b>Housing</b>							
General Fund Housing	48.1	35.7	3.3	7.3	0.0	0.0	94.4
Housing Services	3.1	3.7	3.9	1.2	0.0	0.0	11.9
<b>Total Housing</b>	<b>51.2</b>	<b>39.4</b>	<b>7.2</b>	<b>8.5</b>	<b>0.0</b>	<b>0.0</b>	<b>106.3</b>
<b>Total GF</b>	<b>96.9</b>	<b>67.8</b>	<b>30.8</b>	<b>30.2</b>	<b>13.6</b>	<b>60.0</b>	<b>299.3</b>
<b>HRA:</b>							
Building for Lewisham Programme - HRA	22.3	84.0	118.0	49.5	16.4	87.1	377.3
HRA Capital Programme (Inc. Decent Homes)	82.5	66.5	51.4	54.6	58.9	232.7	546.7
Housing Management System	0.5	0.4	0.0	0.0	0.0	0.0	0.9
Aids & Adaptions	0.5	0.5	0.5	0.5	0.5	2.5	5.0
HRA Allowances for Buybacks & Brockley PFI	6.9	3.1	3.2	0.0	0.0	0.0	13.2
<b>Total HRA</b>	<b>112.7</b>	<b>154.6</b>	<b>173.1</b>	<b>104.5</b>	<b>75.9</b>	<b>322.3</b>	<b>943.1</b>
<b>Total Capital Programme</b>	<b>209.6</b>	<b>222.4</b>	<b>203.9</b>	<b>134.7</b>	<b>89.5</b>	<b>382.3</b>	<b>1,242.4</b>

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## APPENDIX X1: Brockley Residents Feedback and Queries Relating to the Rent and Service Charges Proposed Increase for 2024/25

### 1 Meeting held at St Andrew’s Church, 2nd November 2023.

#### Resident Feedback/Queries and Responses:

1.	<p>(TK) How is the cost of the garages distributed in terms of repairs to these garages?</p> <p>(SS) Lewisham has a pot for repairing garages.</p> <p>(TK) within the current Section 20 Rydon asked for a contribution from leaseholders for garages.</p>
2.	<p>(AF) The water bill is now more expensive than when it was paid to the council.</p> <p>(SS) The water company has taken back the responsibility to collect charges from Lewisham Council, you now have a direct link to them and can challenge the difference with your water suppliers.</p> <p>(SRus) The council had an arrangement to collect on behalf of the water board. The water board now collects directly. The council has no influence towards water prices.</p> <p>(AF) Concerned about paying the water and other bills from Universal Credit</p> <p>(SRus) Explained the council does not have control. Certain elements of Service Charge qualify under certain benefits. If you think you’ve been over charged, you can challenge the Water Board</p> <p>(SS) Pinnacle have provided welfare officers to help with support and guide individuals. Advised to make contact. Some parts of Service Charge can be paid by UC. Income recovery team is responsible for the collection of Charges for Leaseholders and Tenants, they are available to talk issues through. Tuesday’s and Wednesday’s there is surgery at Brockley which anyone can make a booking to discuss money issues by emailing <a href="mailto:Brockley.customerservice@pinnaclegroup.co.uk">Brockley.customerservice@pinnaclegroup.co.uk</a></p>
3.	<p>(SR) Is the increase only for the estimated bill?</p> <p>(SS) yes, adding the RPI, it gives an idea how much items go up for the coming year. You will be charged on the Estimates, this is then adjusted in the Actuals. The Actual is the bill regardless of inflation.</p> <p>(SR) The Service Charge increases of RPI +1% are above inflation increases.</p> <p>(SR) Is the 9.9 % negotiable?</p> <p>(SS) The rate is in line with inflation, this is what it will cost for the new financial year. It is not negotiable.</p>
4.	<p>(TR) The contract goes up by RPI+ X which gives a higher percentage therefore we keep it at just +1% to make the increase. When the RPI is higher on the Service Charge account, we try to minimise the deficit. No control over RPI, its fixed until the contract finishes.</p>
5.	<p>(MB) After rubbish collection, some items are left on the floor where the job appears incomplete by the bin men.</p> <p>(SRus) Suggested reporting it on the website.</p> <p>Fly-tipping is an offence, residents can contact 101 or log the issue on ‘Love Lewisham’ website</p>

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

6.	<p>(ET) Lewisham tenants fund is charged 15p, the charge goes into a fund to encourage the formation of TRA's who can then apply for grants each year, for equipment/training etc..</p> <p>It is managed by a board of Directors and is a registered controlled company.</p> <p>There is training for Chairs, Treasurers etc..</p> <p>Sam can help with setting up TRA's.</p>
7.	<p>I don't feel these charges are justified when there are no means of communicating with Lewisham Council officers, councillors or contractors and there are systemic problems with "appealing and substandard" work.</p>
8.	<p>This is the second consecutive year in which Pinnacle is imposing an almost double digit percentage increase (9.9%) on the cost of the service charge. This will place additional pressures on household finances during the cost of living crisis, and also, when many leaseholders are facing bills of (literally) thousands of pounds to contribute towards Regenter B3's major works programme. The paper is silent on these very real and specific financial pressures on leaseholders arising from the current major works round, which suggests Pinnacle did not consider these pressures in the round when determining this year's annual service charge increase. This is short sighted.</p> <p>We are always told that the increase of RPI + 1% on the service charge is mandated by the PFI contract that the council has signed with Regenter B3 (which requires the service charge to increase by RPIX). This gives leaseholders, and indeed the Council, no recourse to challenge any of these costs and "bakes in" <b>above inflation</b> increases over which no discretion appears to be able to be made. This seems fundamentally wrong.</p> <p>Many residents are wondering what will happen to the service charge after 2027, when the PFI contract with Regenter B3 expires, and we understand the management of the properties in the Brockley PFI area will return to council management. I request that the Housing Committee seeks clarity on the future plans in this area (are the properties to return to council management?) And also, what will the consequences of this be for the future of the service charge and its calculation? Any proposed changes must be consulted upon fairly and transparently - particularly if they were to result in any further increases in service charge costs. I would ask that the Council responds on this point and provides residents with some reassurance.</p>
9.	<p>1 – The document states “residents are invited to consider this report .....” but as Pinnacle and 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.</p> <p>2.7 – Was the heating and hot water charge changes report shared with residents? If not, why not?</p> <p>3.1 Policy Context – The huge increase in service charges may be detrimental to Corporate Strategy Objectives and may mean that a decent home is not secure or affordable and may lead to an increase in homelessness. It is unclear how the action of an increase will help to develop the objectives.</p> <ul style="list-style-type: none"> <li>• How is success measured and what were the results and impact of last year's increase?</li> </ul>

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3.2 – How does the rent increase directly contribute to the 4 bullets and how is this measured?

How does raising charges help deliver Council objectives?

- If Lewisham Council states there are no direct efficiencies or savings and there is no value for money indicators to assess effectiveness how 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 24/25 – No examples are provided, only generic paragraphs. What 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. There is no evidence that value for money is being considered and that 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?
- 5.2- what are the referred to savings and targets? Were these met in previous years?
- 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?

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? Without knowing this how can Lewisham Council and residents test if the contract delivers value for money?

Last year's rent increase proposal documents included additional sections on crime and disorder, equalities, and environmental implications. Are these no longer council objectives? If they are please providing the documentation highlighting where Pinnacle is held to account to deliver these through service charges?

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### 2 Lewisham Council Housing Service: Rent and Service charge meeting (TRA Chairs and Leasehold Forum)

Meeting held via Microsoft Teams, Monday 13<sup>th</sup> November 6:30-8:00pm.  
Rents and Service Charges Feedback:

<b>Property Services:</b>	
Communication	TRAs and residents cannot report communal repairs and leaks on the online system
Communication	There needs to be communication with residents about the cyclical maintenance programme
Communication	There is a lack of coordination and communication between departments.
Cost	Is there any correlation between increase in rent and increased service to residents – i.e. no maintenance
Investment	A lot of disrepair, even though decent homes were done ten years ago, it has not addressed the problems. Leaks are a huge issue and cause mould and condensation.
Investment	Pipes are failing, and causing leaks, because there is no cyclical maintenance programme
Investment	Legal fees for disrepairs could be reduced if there was investment in existing assets to repair leaks, etc. These aren't often addressed quickly enough which makes it more costly long term
Investment	Repairs system and capital programme system need to improve Kitchens and bathrooms changed every 15 years, but other works externally and communal areas have not been done in 25 years.
Repairs & Investment	What causes the huge delay for getting works done for leaseholders? Big delay for leak repair works – 2 years.
Compliance	Concern about security at independent living scheme – people coming in and no one knows who they are
<b>Resident Services:</b>	
Consultation	Want LBL to take on board their (TRA/ Resident's views and ideas) and possible solutions i.e. for flytipping
Housing Management	Encourage TRAs to set up Tenant management Organisations (TMOs).
Housing Management	Independent living officer – given considerably more work, no change in amount of service charge for this reduced service
Environment	Gardening – not happening at Vineries
Environment	Environment is poor, need improved litter-picking
Environment	Appalling upkeep of the estate. Need to improve the basics and ensure the areas are well maintained Fly-tipping – can be resolved, put in a covered space, and put bins away from the road. If estates look good, people are less likely to litter.
<b>Other:</b>	
Communication	There should be a road map for change with the Housing Services now they're in the council. How things will move forward.

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

Finance	Surprised that the council have gone with the maximum increase. It's misleading to say we are going with government advice, as the government say we can go up to 7.7%
ICT/ Home ownership/ Finance	There should be investment in a software upgrade to better predict and monitor service charges. There are currently many errors with the service charge billing

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### 3 Garages

Feedback:
Garages don't have electricity, so enable to store electric cars. What are the plans for electric charging points? Can use a lamppost which already has an electricity supply
It should be clearer what the spend is on garages overall and not just the repairs costs.

### 4 Lewisham Tenants Fund (LTF)

- No questions or comments on report;
- Shirley - Chair of LTF asked to clarify that the LTF is a separate company;
- LTF requested a meeting with Gillian to discuss LTF.

### 5 Response to feedback – Chair, Gillian Douglas (Executive Director of Housing)

#### Rent and Service Charge:

- We are working on asset management strategy;
- Have been impressed by the caretaking and environment teams, and believe they are doing a good job. They are not well resourced, and it's an aging workforce with sickness that needs to be covered;
- We need to set clear expectations for staff;
- We will see if we need to look at transferring resources between estates.
- Fly-tipping is an issue that requires solutions.
- Investment in the stock is needed;
- ACTION - Gillian asked for details of estates she should visit where residents have concerns;
- ACTION - Gillian requested David (Colonnade) email her directly about the roof at Colonnade.

#### Garages:

- ACTION - David Lee to seek update from Martin O'Brien on plans for electric car charging point installation in the Borough.

#### Final comments and next steps:

- Comments from this meeting will be presented to the Housing Select Committee (HSC) meeting, to help inform their discuss and inform their recommendations;
- Any additional comments following the meeting will go to Mayor & Cabinet (M&C) for a decision in February 2044;
- The report goes to full council at end of February 2024;
- Residents will then be advised of the decision that is made.

#### Actions:

- Arrange for Gillian to visit Tanners Hill, Jerningham and the Pepys estate (as requested by residents at meeting);
- David Lee to seek update from Martin O'Brien on plans for electric car charging point installation in the Borough;
- Follow up on LTF request for a meeting with Gillian to discuss LTF;

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- Lewisham Housing to discuss concerns raised at Vineries with independent living team (staff time/ resource available, and security).

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## APPENDIX X2a: Brockley Rent Increase Proposal Report 2024/25

Lewisham Council Dwelling Rents 2024/25	
<b>Report Title</b>	Housing Revenue Account (HRA) – Rent Setting
<b>Contributors</b>	Director Resident Engagement and Housing Service/Executive Director for Corporate Resources
<b>Class</b>	Part 1 <span style="float: right;">Date: November 2023</span>

### 1 Purpose of the Report

To outline the proposed rent increase of 7.7% for Lewisham Council Dwellings in 2024/25. Residents are invited to note this report and provide comments on the proposals.

### 2 Context

- 2.1 During the period from April 2015 to April 2019, the Government mandated for all registered providers of social housing (including local authorities) to reduce dwelling rents by 1% per annum. The financial impact of this was significant which meant that maintaining service levels throughout this period was challenging as a direct result of the loss of income.
- 2.2 From April 2020 the Government published a new Rent Policy which permitted Registered Providers to return to the pre- 2015 methodology for increasing rents annually, up to at least 2025. This method of rent increase is based on CPI + 1%. Lewisham Council has been applying this approach since April 2020.
- 2.3 The exception to this was for the year 2023-24, when all Registered Providers were required to cap the rent increase to a maximum of 7%, in light of the high inflation and the resulting 10.1% CPI as announced in September in 2022. This resulted in a real-terms loss of £3.0m to the HRA.
- 2.4 CPI at September 2023 has recently been confirmed at 6.7%. In adopting the Government's Rent Policy as described in 2.2 above, this results in an allowable rent increase of 7.7% (6.7% + 1.0%). So far there has been no indication from Government that there will be a cap on the increase as there was in 2022, and the proposed increase takes this assumption into account.
- 2.5 The maximum increase is required to be able to deliver against its objectives in relation to the management, maintenance and investment in its housing stock and deliver its wider corporate objectives for housing in the Borough, as detailed in Point 3 below.
- 2.6 The report below sets out the resulting impact on rents.
- 2.7 The potential average service charges and heating and hot water charge changes for 2024/25 are contained in a separate report.

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- 2.8 No proposals have been received to vary the current levy for the Tenants' Fund contribution. The detail is covered in a separate report and summarised below.
- 2.9 The proposed increase to garage rents is covered in a separate report and summarised below.
- 2.10 Residents are invited to comment on the proposals. Residents' comments will be included in the Mayor and Cabinet budget report due in February 2024. Mayor and Cabinet will be requested to approve the increase of 7.7%.

### 3 Policy Context

- 3.1 The contents of this report are consistent with the Council's policy framework. It supports the achievements of the following corporate strategy objective:
- Tackling the housing crisis – Everyone has a decent home that is secure and affordable.
- 3.2 The contents of this report also support the objectives of the Housing Strategy 2020-26, as ensuring an appropriately funded HRA will work towards the delivery of the following objectives:
- Delivering the homes that Lewisham needs
  - Improving the quality, standard and safety of housing
  - Supporting our residents to live safe, independent, and active lives
  - Strengthening communities and embracing diversity.

### 4 Proposal for rent Increases

- 4.1 In line with the formula rent calculation policy, rents for 2024/5 will rise by 7.7% based on CPI of 6.7% (as of September 2023) + 1%, as allowable under the Government's Rent Policy.
- 4.2 A 7.7% increase in average rents for HRA dwelling stock 2024/25 equates to an average increase of £8.57pw over a 52-week period. This will increase the full year average dwelling rent for the London Borough of Lewisham from £111.33pw to £119.91pw. The proposed increase will result in additional income of £6.140m for the HRA.
- 4.3 It should be noted that the HRA cost base for management and maintenance, materials and capital investment will be inflated based on increases similar to or based on the CPI output data. Supply chain and labour supply remains challenging due to the difficult economic climate and the ongoing impact of Brexit and the geopolitical situation in the world. There are also additional cost pressures associated with the zero-carbon agenda and the increased regulatory burden arising from the Social Housing Regulation Act 2023 and other legislative changes such as the Building Safety Act 2022. In addition, debt interest charges will also increase based on the need to borrow for HRA investment needs and the increase in interest rates applied to debt.
- 4.4 The following table provides details of the 7.7% average rent rise by bedroom numbers for housing stock in the HRA as at 1<sup>st</sup> April 2023. Service charges are not

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included in this table – please refer to the Services Charges Proposal Report, as referred to in Point 6 below.

Bed size	Average Rent 2023/24	Average Rent 2024/25	£ Change	% Change
Bedsit	£83.30	£89.72	£6.42	7.7%
1	£97.70	£105.23	£7.53	7.7%
2	£110.20	£118.69	£8.49	7.7%
3	£128.61	£138.51	£9.90	7.7%
4	£144.51	£155.64	£11.13	7.7%
5	£164.40	£177.06	£12.66	7.7%
6	£170.61	£183.75	£13.14	7.7%
7	£175.73	£189.27	£13.54	7.7%
<b>Average Total</b>	<b>£111.33</b>	<b>£119.91</b>	<b>£8.57</b>	<b>7.7%</b>

4.5 For the purpose of business and financial planning, it is assumed that rental charges for the period 2024/25 to 2025/26 will be increased in line with the previous guidance of CPI + 1%.

4.6 At the present time, the financial models used by the council forecast CPI to be an average of 4% for 2025/26 and 2% for 2026/27. It reverts back to the bank of England target of 2.0% annually from 2026/27. This will be constantly monitored and updated when necessary.

### 5 Efficiencies & Savings Proposals for 2024/25

5.1 The HRA strategy and self-financing assessments are continually updated and developed, to ensure resources are available to meet costs and investment needs for 2024/25 and future years.

5.2 There are ongoing discussions regarding appropriate savings and target management and maintenance costs per unit across all council-owned housing. Any savings and efficiencies that are delivered against the current financial budget will be reinvested back into the HRA.

5.3 An update of the HRA Strategy and proposed rent & service charge increases 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.

### 6 Service Charges & Garage Rents

6.1 The agreed policy on Service Charges is that charges should reflect full cost recovery for the type of service undertaken. Heating and hot water costs are also recovered by a charge to tenants and leaseholders.

6.2 A separate report to residents giving further details of the increase to be applied for 2024/25 is provided.

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- 6.3 Garage rents are proposed to rise by 8.9%. This represents an average increase of £1.58pw and would raise the average basic charge from £17.70pw to £19.28pw. The proposed increase will raise an additional £150,000 of revenue income after blue badge discounts have been applied.
- 6.4 The authority continually reviews rental values across the garage stock to ensure they remain on a sound commercial footing and reflect market rents. Any additional changes are likely to be consulted on and implemented for financial year 2025/26 onwards.
- 6.5 Property Estates Services have provided a separate consultation report giving further details of the increase to be applied for 2024/25.

### 7 Tenants' Levy

- 7.1 As part of the budget and rent setting proposals for 2005/06 an allowance was 'unpooled' from rent as a tenant service charge in respect of the Lewisham Tenants' Fund. The current levy is £0.15pw.
- 7.2 No proposals have been put forward by the Tenants Fund Committee to vary this levy for 2024/25. Therefore, the charge will remain at £0.15pw for 2024/25.
- 7.3 The tenants' fund has provided the panels with an update report regarding the accounts of the fund and budget proposals for 2024/25.

### 8 Housing Select Committee

- 8.1 Housing Select Committee will consider the proposals on 28th November 2023.

### 9 Conclusion

- 9.1 From April 2020, councils were able to return to the previous method of rent increases, which was CPI plus 1%.
- 9.2 Whilst Lewisham Council implemented this method to determine the rent rises from that date, Government capped rent increases for 2023/24 at 7%. Rents for 2024/25 are not currently subject to capping from government and will rise by CPI + 1%. CPI as of September 2023 was 6.7%. Therefore, using the formula increase, rent will rise by 7.7% resulting in an average increase of £8.57 per week.
- 9.2 The budget report will be presented to Mayor and Cabinet on 8<sup>th</sup> February 2024.

**If you require any more information about this report, please contact Simone Russell via email: [Simone.Russell@lewisham.gov.uk](mailto:Simone.Russell@lewisham.gov.uk)**

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## APPENDIX X2b: Regenter Service Charge Proposal Report 2024/25

Committee	<b>Brockley Residents Meeting</b>		Item No	
Report Title	<b>Service Charges 2024/25</b>			
Contributor	<b>Regenter Brockley Operations Manager</b>			
Class	<b>Information</b>	Date	<b>2<sup>nd</sup> November 2023</b>	

### 1 Purpose of Report

- 1.1 The report sets out proposals for resident's service charges in 2024/25.
- 1.2 The report requests Brockley Residents to note the proposals to increase the service charges for leasehold and tenanted properties in 2024/25. Resident's comments will be fed back to Mayor and Cabinet as part of the Council's overall budget setting process.

### 2 Recommendations

- 2.1 To inform Brockley Residents on the service charge proposals and feedback comments to 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 The service charges will be increased in line with the September 2023 RPI (Retail Price Index) of 8.9% plus 1% (uplift under RegenterB3 contract) making a total increase of 9.9%. This percentage will be applied to the actual cost of each service element of the 2022/2023 figures. These costs have been audited and the actual cost of each service arrived at.
- 3.3 Each year a review of the actual service charge costs is undertaken as part of the budget setting process and recommendations made to the Council in respect of proposed charges.
- 3.4 Last year the increased cost of living and the energy crisis pushed the retail price index figures into double figures, we are pleased that this year the figure has reduced to single figures. The audit of actual costs completed every year, ensures that any necessary adjustments are undertaken to ensure full cost recovery.
- 3.5 In the current economic environment, it must be recognised that for some residents these service charge increases 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 315 live HB claims and

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

approx. 374 tenants on Universal Credit. We say approx. because there are many tenants who are in receipt of UC but manage their finances themselves paying bills and rent directly. Pinnacle, have a Welfare benefits and financial inclusion team available to support all Regenter Brockley residents. Officers determine the need, whether it be benefit/Income maximisation, help with benefit awareness and eligibility, amongst many other financial support areas. This service is offered to all residents.

### 4 Leasehold Service Charges

- 4.1 The basis of the leasehold management charge has been reviewed and externally audited this summer to reflect the actual cost of the service.
- 4.2 The following table sets out the current average weekly charge and the proposed increase for the current services provided by Regenter B3.
- 4.3 The proposed service charges for 2024/25 have been aligned to the 2022/23 actual service charges costs.
- 4.4 The data in the table for leaseholders has been calculated to reflect the charge applied for inflation as allowed for within the contract at a rate of 9.9% (September 2023 RPI of 8.9% + 1.0%) Overall, charges are suggested to be increased by an average of £1.93 per week which would move the current average weekly charge from £19.48 to £21.41.

Service	Leasehold No.	Actual Weekly Amount (End of Year 2022/2023)	Increase (9.9%)	weekly increase	New Weekly Amount at 9.9%
<b>Caretaking</b>	429	£3.56	9.90%	£0.35	£3.91
<b>Grounds Maintenance</b>	435	£2.17	9.90%	£0.21	£2.38
<b>Communal Lighting</b>	397	£1.84	9.90%	£0.18	£2.02
<b>Bulk Waste</b>	429	£1.47	9.90%	£0.15	£1.62
<b>Window Cleaning</b>	237	£0.03	9.90%	£0.00	£0.03
<b>Resident Involvement</b>	584	£0.29	9.90%	£0.03	£0.32
<b>Customer Services</b>	584	£0.47	9.90%	£0.05	£0.52
<b>Ground Rent</b>	568	£0.00	9.90%	£0.00	£0.00

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<b>General Repairs</b>	584	£3.35	9.90%	£0.33	£3.68
<b>Technical Repairs</b>	401	£0.87	9.90%	£0.09	£0.96
<b>Entry Phone</b>	140	£0.66	9.90%	£0.07	£0.73
<b>Lift</b>	242	£1.76	9.90%	£0.17	£1.93
<b>Management Fee</b>	584	£3.01	9.90%	£0.30	£3.31
<b>Total</b>		£19.48		£1.93	£21.41

### 5 Tenant Service Charges

- 5.1 Tenant service charges were separated out from rent (unpooled) in 2003/04. Tenants pay service charges for caretaking, grounds maintenance, communal lighting, bulk waste collection and window cleaning.
- 5.2 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.
- 5.3 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 2024/25 will be set in November 2023 to be applied from 1st April 2024. Pinnacle review service charges on a regular basis to ensure they are appropriately set and will continue to do so.
- 5.4 The data in the table for tenants as shown below, has been calculated to reflect the charge applied for inflation as allowed for within the contract at a rate of 9.9% (September 2023 RPI of 8.9% + 1.0%) Overall, charges are suggested to be increased by an average of 0.72 pence per week which would move the current average weekly charge from £7.53 to. £8.25.

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Service	Current Weekly Charge based on the Actuals for 2022/23	Increase (9.9%)	weekly increase	New Weekly Amount at 9.9%
Caretaking	£3.56	9.90%	£0.35	£3.91
Grounds Maintenance	£2.17	9.90%	£0.21	£2.38
Communal Lighting	£0.14	9.90%	£0.01	£0.15
Bulk Waste	£1.48	9.90%	£0.15	£1.63
Window Cleaning	£0.03	9.90%	£0.00	£0.03
Tenants fund	£0.15		£0.00	£0.15
<b>Total</b>	<b>£7.53</b>		<b>£0.72</b>	<b>£8.25</b>

Feedback received from residents at the meeting on 2<sup>nd</sup> November will be included in the Housing Select Committee Report. Other comments received to the end of November 2023 will be included in the Mayor and Cabinet Report.

Please ensure all comments are sent to Brockley Customer Services by email at [brockley.customerservice@pinnaclegroup.co.uk](mailto:brockley.customerservice@pinnaclegroup.co.uk) or by post to Brockley Customer Services, 111 Endwell Rd, Brockley, SE4 2PE.

If you require any further information on this report, please contact: Kenneth Gill, Area Manager or Sandra Simpson, Project Manager-Leasehold [Brockley.customerservice@pinnaclegroup.co.uk](mailto:Brockley.customerservice@pinnaclegroup.co.uk) (020 4 518 1447).

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## APPENDIX X3: Rent and Service Charge Increase Proposal Report LBL 2024/25

Briefing for TRA Chairs and the Leaseholder Forum Lewisham Council Rents and Service Charge increase proposal 2024/25 and proposal for the Tenants Fund and Garage charges		
<b>Report Title</b>	Housing Revenue Account (HRA) – Rent, Service Charge and Garage Rent Setting	
<b>Contributors</b>	Director Resident Engagement and Housing Service/Executive Director for Corporate Resources	
<b>Class</b>	Part 1	Date: 13 <sup>th</sup> November 2023

### 1 Purpose of the Report

- 1.1 To set out and explain the proposed rent increase of 7.7% for Lewisham Council Dwellings in 2024/25. This reflects the Government’s Rent Policy and the Regulatory Rent Standard, which allows registered providers to increase rents by the annually reported CPI + 1%.
- 1.2 To set out and explain the proposed service charge increase of 7.7% for both Lewisham Council tenants and leaseholders.
- 1.3 To confirm that the Tenants Fund contribution will remain at 15 pence per week.
- 1.4 To summarise the proposed 8.9% increase to garage rents.
- 1.5 TRA Chairs and members of the Leaseholder Forum are asked to note, comment, and provide feedback on these proposals. Feedback will be reported to the Housing Select Committee at its meeting on 28th November 2023 and to the Mayor and Cabinet in February 2023.

### 2 Context

#### Dwelling rents

- 2.1 Lewisham Council is a Registered Provider (RP) of social housing and is required to comply with the Government’s Rent Policy. The Rent Policy stipulates the maximum increase which may be applied each year.
- 2.2 The current Rent Policy permits RPs to increase rents by a maximum of CPI (Consumer Price Index) + 1%. The CPI figure is taken from the nationally published CPI figure each September for the year preceding the rent increase.
- 2.3 The CPI figure for September 2023 was 6.7%. This means that the Council can increase rents for 2024-25 by 7.7% (6.7% + 1%).
- 2.4 Last year the Government ruled that rent increases for 2023-24 must be capped at 7%, even though the CPI figure was 10.1%, during a year of exceptionally high

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

inflation. The aim of the cap was to reduce the burden on households. The effect of this though was to move the burden to RPs, who were still impacted by high inflation in funding their service delivery.

- 2.5 The Government has not so far indicated that it intends to cap the increase for 2024-25. The Council recognises the fact that tenants still face high living costs, however the Council will need to apply the maximum allowable increase of 7.7% for 2024-25, to be able to afford to continue to deliver services to residents, maintain and invest in the housing stock and make sure that the Housing Revenue Account is sustainable in the medium and long term.

### Service charges

- 2.6 Service charges are payments made by residents for services received in connection with the occupation of their homes. Examples include the management and upkeep of communal areas, health and safety functions and repairs to/investment in the fabric of flat blocks. It also includes a range of services to estates. This may include communal heating and lighting.
- 2.7 Some of these services are required to be delivered for tenants as part of the tenancy agreement and/or the landlord's legal obligations. Where this is the case, the costs will be included as part of the weekly rent charge. Some additional services are 'de-pooled' from dwelling rents, which means they are payable on top of the rent charge. Leaseholders are required to contribute to the costs as set out in their individual Lease Agreement.
- 2.8 The Council is legally required only to pass on charges which are reasonably incurred. To make a reasonable assessment of what the charges should be, the Council calculates estimated service charges for the following year by looking at the actual charges which were incurred during the full previous year for which they have audited accounts and adding on an inflationary amount. For 2024-5, it is proposed the increase will be 7.7%. Actual charges can only be fully determined at the end of the year once the services have been delivered. Once the actual charges are determined, Leaseholders will either receive a credit to their accounts for any overpaid monies or will receive a bill to make up the difference, where the estimated charges were less than the actual costs.
- 2.9 The Regulator of Social Housing does not govern service charge increases in the same way as it governs rent increases. However, its guidance within the Rent Standard is that registered providers should endeavour to limit service charge increases for tenants within the limit of the increase it applies to rent. As explained above, this is currently CPI + 1%.
- 2.10 Where the service charges include repairs and maintenance costs, the Council has used an average of the past three years' costs, to help eliminate any unusual fluctuations in costs. The inflationary uplift is added to this. For services such as asbestos surveys, fire risk assessments and pest control, these costs will be charged in line with the contract values, as charged at the time.
- 2.11 Due to the high cost of procuring and delivering these services in recent years, the ongoing cost of living pressures and the current high CPI figure when compared to previous years, the Council is not passing on the full cost of all works to tenants

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

through its service charges. However, this will be reviewed in future years when inflation (CPI) comes down.

### Tenants' fund contribution

- 2.12 The Tenants' Fund was set up more than 20 years ago to provide financial support for residents' associations and other activities. The Fund is administered by an independent Tenants' Group which has registered as a business with Companies House. All tenants contribute 15p per week to the fund, from their rent payment. No proposals have been received to vary the current levy for the Tenants' Fund contribution. The detail is covered in a separate report.

### Garage Rents

- 2.13 Garage rents are set by the Council's Estates Team. Garage rent increases are not included in the Regulator's Rent Standard nor the Government's Rent Policy as they are not dwellings.
- 2.14 It is proposed that garage rents are increased by 8.9%. This represents an average increase of £1.58 per week. The proposed increase will raise an additional £150,000 after blue badge discounts have been considered.
- 2.15 The income goes into the Council's General Fund and not the Housing Revenue Account. The proposed increase to garage rents is covered in a separate report.

## 3 Policy Context

- 3.1 The contents of this report are consistent with the Council's policy framework. It supports the achievements of the following corporate strategy objective:
- Tackling the housing crisis – Everyone has a decent home that is secure and affordable.
- 3.2 The contents of this report also support the objectives of the Housing Strategy 2020-26 and ensuring a properly funded HRA.
- Delivering the homes that Lewisham needs
  - Improving the quality, standard and safety of housing
  - Supporting our residents to live safe, independent, and active lives
  - Strengthening communities and embracing diversity.
- 3.3 In order to deliver on its Housing Strategy, the Council must produce a balanced HRA Business Plan, which by law is not permitted to go into deficit. As outlined above, it should be noted that the HRA cost base for management and maintenance, materials and capital investment will be increased due to inflationary pressures. Supply chain and labour costs remain challenging due to the difficult economic climate and the ongoing impact of Brexit and the geo-political situation in the world. There are also additional cost pressures associated with delivering on the zero-carbon agenda and the increased regulatory burden arising from the Social Housing Regulation Act 2023 and other legislative changes such as the Building Safety Act

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

2022. In addition, debt interest charges will also increase based on the need to borrow for HRA investment needs and the increase in interest rates.

### 4 Proposal for rent increases

- 4.1 In line with the formula rent calculation policy, rents for 2024-25 will rise by 7.7% based on CPI of 6.7% (as of September 2023) + 1%, as allowable under the Government's Rent Policy.
- 4.2 A 7.7% increase in average rents for HRA dwelling stock 2024/25 equates to an average increase of £8.57pw over a 52-week period. This will increase the full year average dwelling rent for the London Borough of Lewisham from £111.33pw to £119.91pw. The proposed increase will result in additional income of £6.140m for the HRA.
- 4.3 The following table provides details of the 7.7% average rent rise by bedroom numbers for housing stock in the HRA as of 1<sup>st</sup> April 2023.

Bed size	Average Rent 2023/24	Average Rent 2024/25	£ Change	% Change
Bedsit	£83.30	£89.72	£6.42	7.7%
1	£97.70	£105.23	£7.53	7.7%
2	£110.20	£118.69	£8.49	7.7%
3	£128.61	£138.51	£9.90	7.7%
4	£144.51	£155.64	£11.13	7.7%
5	£164.40	£177.06	£12.66	7.7%
6	£170.61	£183.75	£13.14	7.7%
7	£175.73	£189.27	£13.54	7.7%
<b>Average Total</b>	<b>£111.33</b>	<b>£119.91</b>	<b>£8.57</b>	<b>7.7%</b>

### 5 Proposal for Service Charge Increases

- 5.1 The Council will increase services charges by 7.7%, in line with the rent increase.
- 5.2 The table below sets out the estimated service charges for 2024-25, when compared to the current charges for 2023-4.

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

Existing Service	Tenant(T)/Leaseholders(LH)	2022/23 Actual		2024/25 Estimate		Increase from 2022/23 actual(%)
		Weekly Charge	Actual 2022/23	Weekly Charge	Estimate 2024/25	
Asbestos surveys	LH	£0.06	£12,219.92	£0.12	£46,814.43	Budget Estimate
Bulk waste	T & LH	£1.65	£373,032.73	£1.77	£401,756.25	7.7
Caretaking	T & LH	£7.74	£1,677,294.49	£8.33	£1,806,446.17	7.7
Drying room rents	LH	£1.35	£140.00	£1.45	£150.78	7.7
Entryphone	LH	£0.20	£22,307.87	£0.22	£24,025.58	7.7
Fire risk assessment	LH	£0.24	£58,245.06	£0.23	£178,269.02	Budget Estimate
Grounds maintainance	LH	£1.38	£313,573.09	£1.48	£337,718.22	7.7
Ground rent	LH	£0.19	£50,563.74	£0.19	£50,563.74	N/A
Insurance	LH	£0.78	£207,736.33	£0.84	£223,732.03	7.7
Lift	LH	£3.16	£177,916.48	£3.41	£191,616.05	7.7
Management	LH	£2.72	£729,161.09	£2.93	£785,306.49	7.7
Pest control	T & LH	£0.31	£57,124.19	£2.11	£32,591.45	Budget Estimate
Repairs & Maintenance - Building	LH	£3.12	£968,696.25	£2.94	£912,647.49	3 yr ave. plus 7.7%
Storage shed rents	LH	£0.48	£572.00	£0.52	£616.04	7.7
Sweeping	LH	£1.36	£305,703.71	£1.46	£329,242.90	7.7
Technical repairs	LH	£1.11	£351,821.38	£1.15	£362,231.45	3 yr ave. plus 7.7%
Window cleaning	T & LH	£0.04	£9,997.92	£0.07	£9,245.94	Budget Estimate
<b>Total excluding Energy Charges</b>		<b>£25.90</b>	<b>£5,316,106.25</b>	<b>£29.23</b>	<b>£5,692,974.02</b>	
Heating	T & LH	£15.95	£175,036.39	£17.18	£188,514.19	7.7
Communal lighting	T & LH	£1.34	£299,189.51	£1.44	£322,227.10	7.7
<b>Total Energy Charges</b>		<b>£17.29</b>	<b>£474,225.90</b>	<b>£18.62</b>	<b>£510,741.29</b>	
<b>Grand Total</b>		<b>£43.19</b>	<b>£5,790,332.15</b>	<b>£47.85</b>	<b>£6,203,715.31</b>	

### 6 Efficiencies & Savings Proposals for 2024/25

- 6.1 The Council is playing its part on giving tenants and leaseholders value for money, whilst ensuring that resources are available to meet costs and investment needs for 2024/25 and future years.
- 6.2 There are ongoing discussions regarding appropriate savings. Any savings and efficiencies that are delivered against the current financial budget will be reinvested back into the HRA.
- 6.3 An update of the HRA Strategy and proposed rent and service charge increases will be reported to Mayor and Cabinet as part of the HRA Rents and budget strategy report in February 2024.

### 7 Recommendation

- 7.1 Residents are invited to comment on the proposals. Residents' comments from the meeting held on 13<sup>th</sup> November will be included in the Housing Select Committee (HSC) Report, which will be presented at the meeting on 28<sup>th</sup> November 2023. Where additional comments are received after the cut-off date for the preparation of the HSC report, the comments will be fed back through the Mayor and Cabinet budget report. The cut-off date for the Mayor and Cabinet Report is 30<sup>th</sup> November 2023. Mayor and Cabinet will be requested to approve the increase of 7.7% for both dwelling rents and service charges for tenants and leaseholders.

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## APPENDIX X4: Garage Rent Increase 2024/25

INCLUSIVE REGENERATION Estates Team Report		
<b>Report Title</b>	Rental Increases for Garages from April 2024 –Lewisham Council and Regenter RB3	
<b>Key Decision</b>	Yes	<b>Item No.</b>
<b>Contributors</b>	Directorate of Place	
<b>Class</b>		<b>Date: October2023</b>

### 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 8.9%. For the last financial year, the garage increase was capped at 10% although RPI for the year was 12.6%.

### 2 Recommendation

It is recommended that the Council approves, in principle, an increase in rent for the garage portfolio of 8.9%, to be effective from April 2024. 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 2024, it is intended that the increase applied is 8.9%, which is in line with the Retail Prices Index.

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 Council, 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 Council garages is in excess of 3,000 applicants.

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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 a discretionary decision on behalf of the Council, as garages are not a core social dwelling provision.

The highest rent charged is £ £27.39 per week and the lowest is £ 6.77 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 £2.26M, based on a basic average standard charge of £17.70 per week per garage (i.e. before discounts are applied).

If the rents are increased by 8.9%, as proposed, in April 2024, the revised annual rent roll will increase to approximately £2.41M, or from £17.70 per week to £19.28 per week per garage, an uplift of £1.58 per week on average, and a total increase of approximately £190,000 on the annual rent roll, or £150,000 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:

- 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.

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

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-act-codes-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-sectorequality-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 8.9% 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.

### 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 £190,000, or £150,000 net after blue badge discounts have been applied.

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**11 Further Information**

If there are any queries on this report, please contact David Lee via [david.lee@lewisham.gov.uk](mailto:david.lee@lewisham.gov.uk)

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## **APPENDIX X5: Former Tenant Arrears Write Offs**

The Income Team initially pursue collection of debts from tenants who have left properties formally managed by Lewisham Homes.

Where the Income Teams efforts are unsuccessful, the debt is passed to a Debt Collection Agency (DCA) to attempt recovery on the council's behalf. The DCA will attempt to trace the former tenant at their new address and if successful then attempt recovery. The DCA receives a proportion of any debts they recover. If tracing or recovery is unsuccessful the debts are recommended for write off. If a former tenants new address is found after a debt has been written off, the debt is written back and collection efforts are resumed.

Some debts are not passed to the DCA for example, where a tenant is deceased with no estate, or where the debt is Statue Barred and cannot be legally pursued.

The Interim Director of Resident Engagement & Services and the Head of Housing Finance recommend the write off of 32 debts totalling £561,449.14.

### **Summary of six housing debt cases proposed for write off**

A summary of the 32 cases totalling £561,449.14 proposed for write off is set out below. In each case all information that might be identifiable to a certain individual or property has been removed.

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

### Former tenant arrears cases over £10k and prepared for write off

Case Ref	Balance Including Court Costs	Tenancy End Date	Case Summary
1	£16,200.88	24/04/2022	Tenant initially built-up arrears when his HB stopped. The tenant made multiple arrangements to clear his arrears but struggled to maintain payments as he was in and out of work. We obtained a possession order, but the tenant breached the terms as payments were irregular. He was on a zero-hour contract which meant his UC entitlement varied, he was also under-occupying by 2 rooms, so affected by the Bedroom Tax. Eviction action started in February 2020 but was paused due to the Covid-19 pandemic restrictions on possession action. Once the restrictions were lifted, eviction action resumed, and an eviction date was requested in October 2020 and set for March 2022. The eviction was carried out and the case was passed to the DCA who were unable to trace the tenants new address and therefore unable to pursue the debt.
2	£14,327.38	18/09/2022	After the tenant passed away an unauthorised occupant remained in the property. Action to gain possession of the property started in November 2019 but was paused due to the Covid-19 pandemic restrictions on possession action. Once the restrictions were lifted, eviction action resumed but was delayed as the court lost our application. In July 22 a court hearing took place and possession was granted and eviction completed. The case was passed to the DCA and the unauthorised occupant was traced at a new address. The DCA carried out multiple attempts to obtain payment without success.
3	£11,967.51	11/07/2021	The tenant built up high arrears when direct payments from Universal Credit stopped. We became aware the tenant had sublet the property and started eviction action in February 2020. The unauthorised occupant remained in the property and an eviction date was set for April 2020. The eviction was cancelled due to the Covid -19 pandemic restrictions on evictions. Once the restrictions were lifted, eviction action resumed but the court backlogs meant we did not get an eviction date until July 2021. After eviction, the case was passed to the DCA who were unable to trace the tenants new address and therefore unable to pursue the debt.
4	£11,289.96	13/03/2022	Tenant stopped paying rent in March 2020. She informed us she had an accident in April 2020 and was on statutory sick pay. She was referred to our Welfare Benefits Team for support but did not engage. Possession action was paused due to the Covid -19 pandemic restrictions on possession action. When restrictions were lifted her case was referred to court and we obtained possession 5 months later. Eviction

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

			was completed for rent arrears. The case was passed to the DCA and the tenant was traced at a new address. The DCA carried out multiple attempts to obtain payment without success.
5	£10,959.35	12/09/2021	Tenant vacated and left an unauthorised occupant in the property. We pursued possession and a court hearing was set for April 2020, but action was paused due to the Covid -19 pandemic restrictions on possession action. Once the restrictions were lifted, action resumed, and we gained possession at a court hearing in January 2021. The eviction date was set for September 2021. The case was passed to the DCA who were unable to trace the tenants new address and therefore unable to pursue the debt.
6	£10,510.34	13/03/2022	Tenant built up arrears following release from prison. He breached the terms of his possession order due to irregular payments and we applied for direct payment from his Universal Credit entitlement. These payments stopped in September 2019 and arrears increased as no payments were received. Tenant was supported by our Welfare Benefits Team in November 2019 to increase his income from benefits and to look for employment. Eviction action started in February 2020 but was paused due to the Covid -19 pandemic restrictions on possession action. Payments resumed in June 2020, then stopped in November 2020 when the tenant went through a period of depression. Eviction action was resumed in January 2021 and then paused whilst the Homeless Prevention Team attempted to support the tenant. The tenant did not engage and despite the tenant obtaining employment he did not make any payments. In November 2021 an eviction date was applied for. The eviction took place in February 2022. The case was passed to the DCA, and the tenant was traced at a new address. The DCA carried out multiple attempts to obtain payment without success.
7	£55,044.00	08/03/2021	The Client's Housing Benefit stopped due to changes in the family's income. Client's husband was self-employed and required to complete a self-employment form so Housing Benefit could reassess their entitlement. Despite emails, letters, phone calls by-weekly the client failed to engage or make any payments. The NTV was issued but due to Covid-19, restrictions were in place, so we were unable to cancel the booking and discharge duty. Despite this the client was actively pursue for the arrears. Once the restrictions were lifted, an occupant check revealed the clients had moved out of the property. The case was passed to the DCA who were unable to trace the tenants new address and therefore unable to pursue the debt.

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8	£30,690.00	15/08/2021	The Client left property due to DA leaving 2 unauthorised occupants in the property. Assessments were carried out, but none of the occupants had a housing priority. Action to gain possession of the property started in September 2019 but due to Covid-19, restrictions were in place. Once the restrictions were lifted, the eviction was carried out on 15 July 2021. However, the client requested more time to remove furniture from the property. They were given a further 28 days to do this. The case was passed to the DCA who were unable to trace the unauthorised occupant's new address and therefore unable to pursue the debt.
9	£48,888.00	06/11/2023	Partnership Placement – DA. A secure tenant supported by the ASB team. Placement commenced November 2020. Client ineligible for dual Housing Benefit. Investigation concluded client unable to return to secure property, so bidding commenced for alternative permanent accommodation. Successful bid in September and client moved on 6 November 2023 gave vacant possession. PP clients are responsible for the full rent charges at their secure property. Therefore it would be unreasonable for them to also pay for the full rent charges at the temporary accommodation. The new protocol is clients will make a housing application and relinquish their tenancy, where they are unable to return to their secure property.
10	£18,031.00	06/12/2022	The client was in receipt of full Housing Benefit until March 2022. Since then, they failed to engage and provide evidence to support a new Housing Benefit claim. Despite, letters, email, phone calls and interventions from Welfare Benefits and HOC the client failed to engage or pay anything towards the rent charges. The NTV was issued, and an Intentional Homelessness decision could not be acted on due to Covid – 19 restrictions. Once the restrictions were lifted, the booking was cancelled, and the client evicted. he case was passed to the DCA who were unable to trace the clients new address and therefore unable to pursue the debt.

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11	£17,892.00	13/10/2021	Partnership Placement – DA. Phoenix secure tenant. The placement commenced in December 2020. Partial Housing Benefit stopped in February 2021 due to client failing to provide relevant document to support their claim. No payments were made towards the shortfall. Client did not engage so the NTV was issued, and the account closed. PP clients are normally responsible for the full rent charges at their secure property. Therefore it would be unreasonable for them to also pay for the full rent charges at the temporary accommodation. We have made attempts to claim this debt back from Phoenix Housing Association without success. The case was passed to the DCA who were unable to trace the clients new address and therefore unable to pursue the debt.
12	£18,900.00	05/02/2023	Client in receipt of partial HB at the start of the booking. No payments made towards the shortfall. Client supported with HB revision and HB backdated. However, the client was still liable for a shortfall. HB stopped and client failed to engage and make any payments despite efforts of contact via phone with a translator, letter and email. The NTV was issued, and an Intentional Homelessness decision could not be acted on due to Covid – 19 restrictions. Once the restrictions were lifted, the booking was cancelled, and the client evicted. The case was passed to the DCA who were unable to trace the clients new address and therefore unable to pursue the debt.
13	£12,218.58	02/01/2022	Client passed away and an unauthorised occupant remained in the property. Assessments were carried out and the occupant had a housing priority. However, was ineligible for UC or HB as a full-time student so unable to pay the use in occupation charges. The case was passed to the DCA and they contacted the unauthorised occupant. After investigation it appeared the NTQ was issued incorrectly so we are unable to recover these charges despite the occupant being rehoused in a hostel.
14	£18,403.89	10/10/2021	Client's on UC and had long period of no HB award. Partner moved out leaving two non-dependents. Despite attempts of support no payments were made. NTV issues and proceeding her on hold due to covid-19. Once lifted possession was granted and the client evicted on 29 September 2021. On the day of the eviction there was evidence to suggest the

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			property had been abandoned for some time. The case was passed to the DCA who were unable to trace the clients new address and therefore unable to pursue the debt.
15	£16,546.41	27/01/2022	Partnership Placement – DA. Lewisham Secure tenant. PP clients are normally responsible for the full rent charges at their secure property. Therefore it would be unreasonable for them to also pay for the full rent charges at the temporary accommodation. Investigation outcome, EHP agreed and Housing placing bids. We have made attempts to claim this debt back without success.
16	£15,997.02	24/07/2022	Client in receipt of full then partial Housing Benefit. Client maintained a good rent balance until Housing Benefit stopped. The Client failed to engage with Housing Benefit or the Income team despite offers of support by email, letters and phone calls. NTV issued but unable to take action due to Covid-19. A home visit was carried out once lockdown was lifted, the client was not home and the property appeared abandoned. The booking was cancelled, and the eviction took place on 24 July 2022. We have made attempts to claim this debt back without success. The case was passed to the DCA who were unable to trace the clients new address and therefore unable to pursue the debt.
17	£15,580.58	13/02/2023	Client in receipt of partial Housing Benefit and not consistently paying the shortfall each week or month. Housing Benefit stopped and account accrued due to irregular payments. Offers of support made but client failed to engage with Housing benefit and the income team. The NTV was issued but due to covid restrictions no action was taken. However, the arrears was still chased with the client. The booking cancelled and Intentional Homelessness decision sent on 14 February 2023. We do not have a forwarding address for this client, therefore unable to pursue the debt.
18	£14,880.00	15/09/2023	Client working part-time. Income supported with Housing Benefit form but failed to provide relevant documents for claim to be assessed. Despite offers of support, client failed to engage and did not make any payments towards the rent. Eventually they moved out and went to live with a family member in the Camberwell area. The booking was then cancelled. We do not have a forwarding

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			address for this client, therefore unable to pursue the debt.
19	£16,507.39	07/07/2019	Client in receipt of partial Housing Benefit but due to claiming legacy benefits the bedroom tax applied. Client encouraged to move to Universal credit but refused. Client made only one payment. NTV issued and possession order granted. Client provided vacant possession and handed the keys back on 2 July 2019. The case was passed to the DCA who were unable to trace the clients new address and therefore unable to pursue the debt.
20	£12,247.50	24/08/2022	Client passed away leaving 3 children in fulltime education. 2 at university and the youngest in primary school. Full Housing Benefit was in payment before the client's death. The youngest child went to live with her father. The eldest children would not be entitled to Housing Benefit or UC as fulltime student with no dependents. The client death ended the council's homeless duty and the accommodation cancelled. We are unable to pursue children for this debt.
21	£17,217.46	23/10/2022	Client in receipt of partial Housing Benefit but never paid enough to meet the rent shortfall. Regular contact was made to support. Letters, email, and phone calls we made without success. Housing Benefit stopped in Oct 2021. NTQ issued and the judge granted possession. The eviction 10 October 2022. The case was passed to the DCA who were unable to trace the clients new address and therefore unable to pursue the debt.
22	£11,376.00	19/07/2022	Partnership Placement DV – L&Q. Full HB stopped and backdated to February 2022. However, the client did not inform the providers when they left and did not hand the keys back. The providers were only aware the client had left when they did an occupancy check following a request from the council. As a result, the placement ended July 2022. PP clients are normally responsible for the full rent charges at their secure property. Therefore it would be unreasonable for them to also pay for the full rent charges at the temporary

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			accommodation. We have made attempts to claim this debt back without success.
23	£11,266.50	19/09/2022	Partnership Placement DV – Private Tenant. No HB and client did not engage with offers of support with Housing Benefit claim. The property was abandoned, and client moved back to private property due to suitability for elderly father's health condition. This report has been disputed as providers claim someone was residing at the property when they carried out occupancy checks in September 2022. The unauthorised occupant said they were paying the client rent. The case was passed to the DCA who were unable to trace the clients new address and therefore unable to pursue the debt.
24	£13,668.00	18/10/023	This account was opened late due to an officer leaving without handover. The debt was over £4k when the account was first opened. By this time, it was unclear if the client was still residing at the property due to a note on Housing Benefit stating a new address. The Client did not provide an email address so letters, phone calls and text messages were sent but the client did not engage. The providers also had difficulties contacting the client during their last 3 by-weekly occupancy checks. The provider advised that the client is not in occupation and had abandoned the property so the account was closed and duty discharged. We were unable to trace the clients new address and therefore unable to pursue the debt.
25	£11,169.82	14/11/2021	Client in receipt of partial Housing benefit but failed to meet the rent shortfall. The client was sent letters, emails, phone calls and provided with support and advice but the arrears continued to increase. The judge granted possession 6 September 2021 and the client was evicted on 8 November 2021. The case was passed to the DCA who were unable to trace the clients new address and therefore unable to pursue the debt.

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26	£10,201.00	15/01/2020	Client in receipt of full Housing Benefit. HB Stopped in January 2020. The Client refused to stay at the property as they felt it was unsafe for their children. Client failed to engage with offers of support by letter, email and phone calls to reinstate Housing Benefit claim. The debt occurred as a result. The client was moved to alternative temporary accommodation in July 2019. The case was passed to the DCA who were unable to pursue the debt.
27	£26,688.83	31/10/2020	Client failed to engage despite offers of support. No Housing Benefit and client did not make sufficient payments. NTV issued and Intentional Homeless decision made but unable to evict due to covid -19. Once lifted the client was evicted on 13 October 2020. The case was passed to the DCA who were unable to pursue the debt.
28	£17,069.75	31/12/2022	Partnership Placement DV – L&Q Tenant. No HB and as client did not engage with offers of support with Housing Benefit claim. After many attempts of contact client advised us via Housing Benefit that they had moved in with friends and returned the keys to the provider the next day, 24 September 2021. However, the provider disputed this and the rent account was not closed until 31 December 2022.
29	£10,147.35	12/05/2022	Partnership Placement DV – L&Q Tenant. Full HB stopped and backdated. Client moved out of the property in March 2022 due to condition which was reported to the provider but never resolved. The account was not closed until May 2022.
30	£22,247.19	28/02/2016	Client evicted and referred to Madina without success. Unable to pursue due to statute barred
31	£11,524.20	23/07/2017	Client evicted and Discharge of duty. FTA Team made attempts to recover debts without success.
32	£11,791.25	12/09/2021	Client abandoned the property. FTA and Madina unable to trace and recover debts.

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## **APPENDIX X6: Other Associated Charge 2024/25**

### **Garage Rents**

1. The detail of these charges and the changes are as set out in appendix 4. The proposal is for a 8.9% increase in charges which equates to an average increase of £1.58 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 2023/24. Therefore the charge will remain at £0.15pw for 2024/25.

### **Hostel charges**

4. Hostel accommodation charges are set based on current the Governments formula rent calculation and will increase by 7.70% (£3.10 per week).
5. Hostel service charges are set to achieve full cost recovery, following the implementation of self-financing. For 2024/25, the charge for Caretaking/management and Grounds Maintenance will increase by 7.70%. This will increase the average charge from £77.56 to £83.48 per unit per week.
6. In addition, the charge for Heat, Light & Power will be increased by 10% and move the average charge from £7.17pw to £7.88pw. Water charges will increase by 9.2% and will move the average charge from £0.21pw to £0.23pw. 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% 2024/25.
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**

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 £466k. Current indications are that an inflationary increase of 2.0% will be applied for 2024/25, increasing the HRA charge by £9k (to £475k for 2024/25). The current Linkline charge to HRA residents is £6.44 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

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and Cabinet. 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 (PRA) 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 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 2024/25 is for an increase of £1.23pw or 7.7%. This will move the current charge from £15.95pw to £17.18pw. This is based on the latest available unit rates and consumption data.
15. The proposal for communal lighting is for an increase of 7.7% or £0.10 per week. This will move the current average charge from £1.34pw to £1.44pw. 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 2023/24 and 2024/25 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.

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## APPENDIX X7: HRA Business Plan

### Summary

#### 1 Summary

The HRA Business Plan is a strategic plan that sits alongside the council's medium term financial plan. It details the income and expenditure that applies to the council's housing stock and is an important strategic document in the management and oversight of the HRA.

#### 2 Recommendations

Mayor and Cabinet are asked to approve the Housing Revenue Account (HRA) Business Plan 2023-2054.

#### 3 Policy Context

This report aligns with Lewisham's Corporate Priorities, as set out in the Council's [Corporate Strategy \(2022-2026\)](#):

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

In particular, this report is closely aligned to priority Quality Homes because the housing revenue account is the ring-fenced budget for maintenance and investment in council homes and services to tenants.

#### 4 Background

The HRA is a ring-fenced account that covers the income collected through rents and service charges that council tenants pay and the expenditure on council homes and services to tenants. There is also borrowing against the account in order to fund investment in the housing stock.

Revenue expenditure is used to manage, repair and maintain the housing. Also to pay debt costs (interest and repayments).

The HRA is also used for stock investment, planned programmes and to part fund new build works, through the HRA capital programme.

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### 5 Purpose and Content of the Plan

The HRA Business Plan provides a long-term financial plan for managing and overseeing the sustainability of the HRA.

A number of assumptions have been made in the financial modelling. For example, it has been assumed that rents will rise by CPI+1% up to financial year 2025/26 and CPI+0.5% thereafter, With income projected to be of the order of £101.6m pa from rents and service charges.

The council's housing stock was previously managed by the arms length management organisation (ALMO) Lewisham Homes. Lewisham Homes received HRA funding from the council to deliver all aspects of housing management, repairs, maintenance and stock investment. This arrangement came to an end when the ALMO transitioned back into the council on 1<sup>st</sup> October 2023. Therefore the stock is now directly managed by the council.

It is important to have in place a HRA Business Plan to ensure that the demands on the account are balanced against the income available and that there is effective prioritisation of these demands.

Local Authorities generally are facing pressures on their HRAs as regulatory requirements have increased and the need to improve standards has been in the spotlight. The powers of the Regulator of Social Housing and the Housing Ombudsman have increased and there has rightly been a focus on the quality and safety of social housing across the country. It is imperative that we maintain oversight of the HRA in order to balance the competing demands on the account and to ensure its sustainability in the short and long term.

Stock investment and safety are our highest priorities. We know we need to improve the decency of our homes and have profiled a capital programme for investment totalling £336.6m over 5 years which runs 2023-28. The HRA capital contribution to the new build programme (Building for Lewisham) is profiled over the same period and totals £109m over that period.

### 6 Reviewing the Plan

The Plan is a dynamic document that will be subject to change, particularly once a stock condition survey has been undertaken to inform our future investment plans. The Plan will be reviewed annually with the financial modelling forming part of the council's annual budget reports to Mayor and Cabinet and then Council.

We will also develop an Asset Management Strategy in 2024/25 that sets out more detail on our plans for stock investment and improvement.

A Summary of key assumptions in the HRA Business Plan are shown below.

The HRA business plan provides long-term financial forecasts resulting from the implications of the Council's spending, investment and rent-setting decisions, based on the authority's current income, expenditure and investment expectations. The data is combined with key assumptions on how costs and income might change in the future to illustrate what the authority can reasonably expect to happen, using the best available information.

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Regular review of assumptions is important in order to help the Council make early decisions that help keep the HRA in balance, whilst also delivering substantial levels of investment in Council housing.

A summary of the key assumptions that underpin the 30 Year Business Plan are presented below:

Description	Effect on Business Plan	Assumptions used within the Business plan
HRA Stock Movements	Projections for rental income is based on stock numbers	Baseline stock numbers in the current year are adjusted for projected RTB sales and new affordable housing supply
Inflation on supplies and services	Income and expenditure is adjusted for inflation to reflect general cost increases. CPI forecast is based on rate in September of previous year.	Rental income uses CPI. Garages increased by RPI. CPI September 2023 6.7%. Forecast to reduce to 4% in year 2, reducing to 2% from year 3 onwards. RPI 4% in year 2, reducing to 2% thereafter.
Minimum Working Balance	Target level of minimum reserve for any overspends	Working balance requirements assumed at 10% of income giving circa £8.0m
Rental Income	Tenant rent projections are driven by stock numbers and average rent. Tenant rent is the largest source of income for the HRA	Average rent is currently set at £111.33 per week for 2023/24. Rent is adjusted as per government policy. Assumed CPI+1% for 2024/25 will raise rents by 7.7% to £119.91 per week. Assumed CPI+1% for 2025/26 and CPI+0.5% thereafter
Supervision and Management Costs	Rental income is allocated to management costs of providing a landlord service	Cost assumed to increase by CPI each year
Repairs and Maintenance Costs	Rental income is allocated to repairs budgets	Expenditure is adjusted in line with CPI and stock movements
Tenants and Leasehold Service Charges	Cost of specific services are charged back to tenants and	Service charge uplift is in line with anticipated actual cost increases

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	leaseholders	
Voids	Level of void properties has an impact on rental income achieved	Rent loss though voids are estimated at 1.5% of rent
Bad Debts	Level of Rent and service charge arrears that are not collected or written-off results in loss of income	Assumed on average 4% of rent and service charges
Right to Buy Sales	Stock reductions reduce rental income, with retained receipts reinvested in new affordable housing	Projected 90 sales per annum
Interest rate on borrowing	Rental income is allocated to financing debt	Debt charge is assumed at interest rate of 4.0%
Depreciation	Rental income is allocated to Depreciation, which reflects the decline in the value of an asset over time due to wear and tear. A corresponding credit is made to the Major Repairs Reserve to fund capital spend on the existing stock	Depreciation within the business plan is approximately £26m and forecast to rise by 2% annually on average.
Capital Programme - Major Works	Investment to maintain housing stock at decent homes etc.	Profile for investment of £321m for 5-year period from 2022/23
HRA Debt Balance	The HRA debt balance as at 31st of March 2023 was £99.5m.	Accumulated reserve balances will determine capacity for debt repayments
Efficiency Savings	Savings contribute towards offsetting budget pressures	10% saving requirement for 2024/25 across revenue costs for management and repairs.

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**7 Legal implications**

In accordance with the Local Government and Housing Act 1989 (as amended) local authorities are obliged to keep their HRA separate to other accounts and to ensure there is no cross-subsidy to or from the council's General Fund resources.

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## **HRA Business Plan**

### **Lewisham Council**

### **Housing Revenue Account Business Plan**

#### **Executive Summary**

#### **1 Introduction**

- 1.1 Lewisham is an inner London borough that, along with the rest of London, is facing an unprecedented housing crisis. This business plan explains how the Council's housing service will contribute towards resolving that crisis through appropriate and targeted use of the Housing Revenue Account.
- 1.2 A Business Plan has two main elements:
- A narrative explaining the nature of the business, the environment it operates in, and its business strategy and objectives.
  - A 30 year financial model that shows the resources that the business will have and how it will use them, demonstrates that the business is viable and considers the potential financial implications of risks.
- 1.3 It is important to have a business plan because:
- Having a well thought out strategy is better than just carrying on doing what has always been done.
  - A business needs to plan its finances in the long-term rather than just on an annual basis especially where decisions need to be taken with long-term financial implications.
  - A business needs to consider risks that may affect its financial viability and how to manage them.

#### **2 Strategic Vision and Objectives**

- 2.1 The Council's strategic vision and objectives for housing can be found in its corporate plan, climate emergency action plan, housing strategy and local plan.
- 2.2 The Council has a strong social purpose and is committed to improving housing, building new homes through the Building for Lewisham programme and engaging with residents.

#### **3 External, Policy and Legislative Changes**

- 3.1 The housing market in Lewisham is changing with more private sector rented housing, housing becoming less affordable, a shortage of social and affordable housing and an increasing number of people affected by homelessness.
- 3.2 The Greater London Authority has published the London Plan and a London Housing Strategy. The Regulator for Social Housing sets consumer standards that the Council must deliver. The Consumer Standards have been strengthened and expanded and the new standards will be introduced in April 2024.

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

- 3.3 The United Kingdom government has set house building targets. It also published a white paper that proposed to empower tenants and to supply more social homes and that has led to the Social Housing (Regulation) Act 2023. The United Kingdom government also exercises significant control over the finances of local authority housing through the self-financing settlement of 2012, welfare reform policies and controls over rent increases.
- 3.4 In 2020, a global Coronavirus pandemic started that has had a major impact on many aspects of life including local authority housing services. Some of these impacts are temporary whereas others will be permanent. Britain left the European Union in 2021. This has also had an impact on local authority housing services, particularly in terms of access to the supply chain and in terms of the labour market.
- 3.5 Council housing rents are set in accordance with the government's policies on social housing rents. Rents increases are limited by government and the current policy is to limit them to the increase in consumer prices index (CPI) plus 1% each year (based on CPI from the previous September). As CPI was 10.1% in September 2022 that would have triggered an 11.1% rent increase in 2023/24, so the government introduced a rent cap of 7% in 2023/24. This means that rents increased by less than inflation causing financial pressure in the housing revenue account. It will probably be long-term if councils are not able to increase rents by more than CPI plus 1% from 2024/25 onwards. Rent income is £82.3million in 2023/24 so a 1% variation is £0.8m a year. The increase for April 2024 will be 7.7%, following CPI at 6.7% plus 1%.

### 4 Governance and Risk Management

- 4.1 The London Borough of Lewisham is governed by a directly elected Mayor and a Council of 54 members. There is a Housing Select Committee.
- 4.2 The Council reviewed its Strategic Risk Register in September 2021 and again in October 2023 following the transition of Lewisham Homes back in to the council. It identified risks relevant to housing including failure to deliver the Building for Lewisham programme, failure to comply with consumer standards, Catford and Lewisham Regeneration and Development, estate rationalisation, welfare reform and building costs.
- 4.3 Risks and issues that are specific to the housing revenue account include:
- Complying with the Decent Homes Standard and other Consumer Standards
  - Delivering the Building for Lewisham Programme
  - Delivering the Catford & Lewisham Regeneration Projects
  - The Cost of Living Crisis, Welfare Reform & Affordability
  - Pressure on the repairs service and the link to longer term stock investment (to raise standards and prevent repeat repairs)
  - Refurbishment of Brockley PFI scheme, Tower Blocks & Replacement of Lifts
  - Investing in the state of the neighbourhood, environmental services and addressing stigma and inequalities affecting our tenants and residents
  - Meeting obligations for building safety, fire precautions and electrical safety.
  - Improvements to sheltered housing and installation of aids and adaptations.
  - Environmental Sustainability, SAP ratings & Zero Carbon targets.
  - Risk that carbon reduction works suffer due to the other pressures for works for building safety and basic upkeep of the stock.
- 4.4 Following a review of performance in autumn 2023 the council self-referred to the Regulator of Social Housing (RSH) based on potential breaches of the Home Standard,

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specifically covering non-decent homes, poor repairs service performance and overdue fire safety actions. The council is working to improve performance in these areas and will engage fully with the RSH to achieve this

### 5 Functions of the Housing Service

- 5.1 Until October 2023, most of the council's housing stock was managed by Lewisham Homes, an arms' length management organisation.
- 5.2 The Council reviewed the delivery of housing services including considering whether to continue with the arms' length management arrangements and whether there was any scope to make efficiency gains in management budgets. A decision was taken to bring all housing and asset management functions back in-house, meaning that over 500 staff were transferred in to the council under TUPE .
- 5.3 A new Housing Directorate was established from 1<sup>st</sup> October 2023, comprising the following three divisions: Housing Strategy, Resident Engagement and Services, and Quality and Investment.

### 6 Asset Management Strategy

- 6.1 There were 14,092 tenanted dwellings in the stock on 1<sup>st</sup> April 2023, along with about 5,300 leasehold properties. Most are in medium-rise blocks and most were built between 1961 and 1980. 12,275 were in the core stock, 320 were in hostels, 65 were in Milford Towers, 29 were in Excalibur and 1,258 were in the Brockley PFI scheme. Stock numbers are forecast to decline by about ninety units a year mainly because of eligible tenants exercising their 'right to buy'.
- 6.2 While the Council is committed to increasing the supply of social and affordable housing in the borough, it considers that its first duty as a housing landlord is to meet its statutory obligations and to provide good quality homes and services to its existing tenants.
- 6.3 Prior to the transfer, Lewisham Homes published an Asset Management Strategy for 2021 to 2026. This was based on a Stock Condition Survey that was carried out during 2019 and 2020 and was reported in early 2021. This demonstrated that the stock was not in a good condition with 47% failing the decent homes standard and a requirement to invest £637.5million over thirty years. Lewisham Homes estimated that a further £297.4million was required for items not included in the stock condition survey, bringing the total to £934.9million. As at April 2023 Lewisham Homes reported 17% of homes being non-decent.
- 6.4 However, even this was found to be an under-estimate mainly because of the need to:
  - Refurbish high-rise flats including Milford Towers in Catford.
  - Potentially regenerate sites with large panel systems buildings.
  - Replace lifts in tower blocks.
  - Invest in neighbourhoods.
  - Carry out works identified in property MOTs.
  - Invest in Energy Performance and Sustainability.
  - Meet obligations for building safety, fire precautions and electrical safety.

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- Improvements to hostels and sheltered housing and installation of aids and adaptations.
- 6.5 The Council therefore is reviewing the capital stock investment programme to establish the cost of these works and to ensure that they are budgeted for in the housing revenue account. An Asset Management Strategy will need to be produced in the longer term and shared with tenants and residents.
- 6.6 The Council must upgrade its stock so that all dwellings have a SAP rating of C or above by 2030. However, there are 851 properties where achieving a grade above C would not be possible and there is no budgetary provision for this policy on the grounds that the upgrades may be funded by government grants. The Council is therefore carrying out a review of the 851 properties where achieving a grade above C would not be possible, and is assessing the potential costs of the zero carbon policy with a view to establishing an appropriate contingency in the business plan. In September 2022 there were 65 homes that failed the decent homes standard because of lack of thermal comfort.
- 6.7 The council is in the process of procuring a full stock condition survey and a volume of disrepair surveys at a cost of up to £2.925m (see Mayor Cabinet meeting of 24/1/24). It is recognised that a full and up to date survey is needed in order to base stock investment plans on accurate and up to date information.
- 6.8 The council plans to allocate resources for the Brockley PFI scheme upon its completion at £2.3million for 2027/28 (when the PFI stock will transfer back in to the council) and £5.6million thereafter.
- 6.9 The Council's long-term assets include £1.4billion of council dwellings. The council housing stock is therefore a significant resource for the borough and there is a need to maximise the opportunities to gain value from the council's assets. Matters to note include:
- Project Management – The Council has a record of underspending on its capital programme. The Council is therefore reviewing its project management arrangements.
  - Borrowing – The Council plans to make extensive use of its borrowing powers in the Housing Revenue Account. Clearly this will have implications for the revenue budget especially in view of recent and anticipated increases in interest rates.
  - Reserves – The Council is planning to use a significant proportion of its reserves to fund the capital programme.
  - Capital Receipts – The Council is reviewing its capacity to generate capital receipts in the future.
  - Sustainability –The Housing Revenue Account capital programme is planned to increase with much of it devoted to new build.

## 7 Damp and Mould

- 7.1 The Council responds to individual reports of damp and mould, makes regular inspections to identify cases of damp and mould and collects data to gain better insights into the extent of damp and mould.
- 7.2 The previous stock condition survey identified 2,438 tenanted homes (20% of the stock) that had defects with the potential to result in severe or moderate damp. Lewisham Homes previously commissioned validation surveys of these. Access was gained into 1,431 properties, of which 719 had no hazards present in relation to damp

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or mould and 608 have since received remedial work. In December 2022, Lewisham Homes held 365 live cases of damp and mould, with 484 closed cases with work completed. The council is considering smart technology to identify when mould growth is likely to occur in a property by remotely logging humidity levels and heating use.

### 8 Financial Strategy and Planning - Revenue

8.1 The Business Plan financial projections cover the years to 2061/62. The first fifteen years are summarised below:

	2023/24	2024/25	2025/26	2026/27	2027/28
	£M's	£M's	£M's	£M's	£M's
Rents	82.5	88.3	91.4	97.4	99.7
Tenants service charges	6.8	7.3	7.4	7.5	7.5
Leasehold service charges	6.2	6.6	6.7	6.8	7.0
Hostel charges and grants	1.5	1.5	1.5	1.6	1.6
Major Works recoveries	12.4	6.3	6.4	6.5	6.7
Other income	1.7	1.8	1.8	1.8	1.8
<b>Operating Income</b>	<b>111.1</b>	<b>111.8</b>	<b>115.2</b>	<b>121.7</b>	<b>124.3</b>
<b>Less:</b>					
Management costs	-46.2	-49.3	-47.2	-49.3	-51.7
Repairs & maintenance	-19.5	-18.1	-18.4	-18.6	-19.8
PFI Costs	-6.7	-6.8	-6.8	-6.9	-1.7
	<b>-72.4</b>	<b>-74.2</b>	<b>-72.4</b>	<b>-74.8</b>	<b>-73.1</b>
Interest & other finance costs	-5.5	-8.3	-11.7	-14.1	-14.9
Depreciation	-26.2	-26.7	-27.2	-27.7	-28.1
<b>Operating surplus/(deficit) after financing</b>	<b>7.0</b>	<b>2.6</b>	<b>3.9</b>	<b>5.1</b>	<b>8.2</b>
RCCO	-5.5	-2.8	-3.8	-4.7	-8.2
Interest on balances	0.2	0.2	0.2	0.2	0.2
<b>Surplus/(deficit) after appropriations</b>	<b>1.8</b>	<b>-0.0</b>	<b>0.3</b>	<b>0.6</b>	<b>0.2</b>
Opening reserves	7.9	9.7	9.6	10.0	10.6
Other Reserve Contributions	0.0	0.0	0.0	0.0	0.0
<b>HRA Reserves</b>	<b>9.7</b>	<b>9.6</b>	<b>10.0</b>	<b>10.6</b>	<b>10.8</b>

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

	2028/29	2029/30	2030/31	2031/32	2032/33
	£M's	£M's	£M's	£M's	£M's
Rents	102.1	104.1	106.0	109.7	111.8
Tenants service charges	7.6	7.7	7.8	7.9	8.0
Leasehold service charges	7.1	7.3	7.4	7.6	7.7
Hostel charges and grants	1.6	1.7	1.7	1.7	1.8
Major Works recoveries	6.8	6.9	7.1	7.2	7.4
Other income	1.8	1.8	1.8	1.8	1.9
<b>Operating Income</b>	<b>127.1</b>	<b>129.5</b>	<b>131.8</b>	<b>136.0</b>	<b>138.5</b>
<b>Less:</b>					
Management costs	-54.4	-55.5	-56.7	-59.4	-60.1
Repairs & maintenance	-20.9	-21.2	-21.5	-21.8	-22.0
PFI Costs	0.0	0.0	0.0	0.0	0.0
	<b>-75.3</b>	<b>-76.7</b>	<b>-78.2</b>	<b>-81.1</b>	<b>-82.2</b>
Interest & other finance costs	-16.0	-17.3	-19.7	-21.2	-21.0
Depreciation	-28.5	-29.1	-29.6	-30.1	-30.7
<b>Operating surplus/(deficit) after financing</b>	<b>7.3</b>	<b>6.4</b>	<b>4.3</b>	<b>3.6</b>	<b>4.6</b>
RCCO	-7.3	-6.4	-4.3	0.0	0.0
Debt Repayment	0.0	0.0	0.0	-3.5	-4.7
Interest on balances	0.2	0.2	0.2	0.3	0.4
<b>Surplus/(deficit) after appropriations</b>	<b>0.3</b>	<b>0.2</b>	<b>0.2</b>	<b>0.4</b>	<b>0.2</b>
Opening reserves	10.8	11.1	11.3	11.5	11.9
<b>HRA Reserves</b>	<b>11.1</b>	<b>11.3</b>	<b>11.5</b>	<b>11.9</b>	<b>12.1</b>

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	2033/34	2034/35	2035/36	2036/37	2037/38
	£M's	£M's	£M's	£M's	£M's
Rents	113.8	115.9	118.0	120.1	122.3
Tenants service charges	8.1	8.2	8.3	8.4	8.5
Leasehold service charges	7.9	8.0	8.2	8.3	8.5
Hostel charges and grants	1.8	1.9	1.9	1.9	2.0
Major Works recoveries	7.5	7.7	7.8	8.0	8.1
Other income	1.9	1.9	1.9	1.9	1.9
<b>Operating Income</b>	<b>140.9</b>	<b>143.5</b>	<b>146.0</b>	<b>148.6</b>	<b>151.3</b>
<b>Less:</b>					
Management costs	-60.9	-62.8	-63.0	-64.4	-66.0
Repairs & maintenance	-22.3	-22.6	-22.9	-23.2	-23.5
PFI Costs	0.0	0.0	0.0	0.0	0.0
	<b>-83.3</b>	<b>-85.4</b>	<b>-85.9</b>	<b>-87.6</b>	<b>-89.5</b>
Interest & other finance costs	-20.8	-20.6	-20.3	-20.1	-19.9
Depreciation	-31.2	-31.8	-32.3	-32.9	-33.5
<b>Operating surplus/(deficit) after financing</b>	<b>5.6</b>	<b>5.7</b>	<b>7.5</b>	<b>8.1</b>	<b>8.4</b>
RCCO	0.0	0.0	0.0	-2.1	-8.0
Debt Repayment	-5.7	-5.8	-7.5	-5.9	-0.3
Interest on balances	0.3	0.3	0.3	0.2	0.2
<b>Surplus/(deficit) after appropriations</b>	<b>0.2</b>	<b>0.2</b>	<b>0.2</b>	<b>0.2</b>	<b>0.2</b>
Opening reserves	12.1	12.3	12.5	12.8	13.0
<b>HRA Reserves</b>	<b>12.3</b>	<b>12.5</b>	<b>12.8</b>	<b>13.0</b>	<b>13.2</b>

8.2 The Business Plan operates at a small surplus in all years apart from 2024/25. Revenue contributions to capital outlay are made in all years apart from 2031/32 to 2035/36. Reserves increase from £7.9million in 2023/24 to £13.2million in 2037/38 and £165.8million in 2061/62.

8.3 The Business Plan forecasts the following changes in stock numbers. The core stock reduces by sixty units in 2023/24 and ninety units in subsequent years because of estimated right to buy sales; Excalibur effectively closes in 2023/24; Other elements of the stock remain unchanged:

	2023/24	2024/25	2025/26	2026/27	2027/28
Core	12,215	12,155	12,065	11,975	11,885
Hostels	320	320	320	320	320
Milford Tower	65	65	65	65	65
Excalibur	29	1	1	1	1
PFI	1,244	1,244	1,244	1,244	1,244
<b>Total</b>	<b>13,873</b>	<b>13,785</b>	<b>13,695</b>	<b>13,605</b>	<b>13,515</b>

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8.4 This table does not take account of new builds as they come forward through the direct delivery programme. Neither does it take account any recent acquisitions.

8.5 The consumer prices index increased by 10.1% during the twelve months ended in September 2022 and by 6.7% during the twelve months ended in September 2023. The government forecasts that the rate of increase in the consumer prices index will fall to around 5% by the end of 2023. The business plan assumes that the consumer prices index will increase by 6.0% in 2023/24 and 2% a year thereafter. The Council will therefore closely monitor the impact of inflation on the business plan.

8.6 Under government rents policy, social rents usually increase by the level of the increase in the consumer prices index in the previous September plus 1%. This would have resulted in an increase of 11.1% in April 2023. However, the government decided to cap rent increases at 7% in 2023 and the model provided for this. The increase for April 2024 will be 7.7%. The model prudently assumes a rent increase based on the increase in the consumer prices index plus 0.5% a year in subsequent years.

8.7 The repairs and maintenance budget is calculated as follows:

	2023/24 £,000	2024/25 £,000	2025/26 £,000	2026/27 £,000	2027/28 £,000
Average units	12,585	12,496	12,406	12,316	12,848
R&M / unit	1,359	1,440	1,469	1,498	1,528
Allocation	17,099	17,997	18,225	18,455	19,637
Growth	2,254	0	0	0	0
New Build	145	148	151	154	157
Total	19,498	18,145	18,376	18,609	19,794

8.8 This expenditure is significantly less than the expenditure on revenue repairs and maintenance that the Quality and Investment management team have calculated is required (see below). The gap is £4.8million in 2023/24 and £6.2million in 2024/25. In addition, expenditure at £22.7million was below the estimated requirement of £26.0million in 2022/23 presumably creating a backlog of £3.3million. There is therefore a shortfall of £14.3million over the three years. The Council has provided for the capitalisation of £5million of revenue repairs in the capital programme for 2023/24 and further capitalisations are likely to be required and made in future years. The council has also launched a Repairs Transformation Programme to improve the end to end service, increase productivity and efficiency, clear the works in progress (backlog of repairs jobs) and raise resident satisfaction

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- 8.9 The figures in brown in the table below represent the essential revenue and capital spend required to keep the housing stock within regulatory and statutory compliance, or an existing commitment. These figures are mainly based on current budgets and validated works, so are considered to be reasonably accurate.<sup>1</sup>

Expenditure heading	2023/24	2024/25
Responsive Repairs	8,530,000	8,530,000
Disrepair	860,000	860,000
MOT Programme	1,900,000	1,900,000
Voids	3,850,000	3,850,000
Gas & Heating	2,800,000	2,800,000
Fire Safety (FRAs and Servicing)	600,000	600,000
M&E Servicing	730,000	730,000
Asbestos	200,000	200,000
Electrical Safety	2,500,000	2,500,000
Building Safety (essential work)	250,000	250,000
Fire Door Checks	2,000,000	2,000,000
Environmental services	100,000	100,000
Total	24,320,000	24,320,000
Units	12,607	12,517
Per unit	1,929.09	1,942.96

- 8.10 Repairs and maintenance costs are increased by 6.0% in 2024/25 and 2.0% in each of the subsequent years. This is a low level of provision for inflation given that building maintenance costs are currently increasing by more than this. The Council will closely monitor the impact of inflation on repairs and maintenance budgets.
- 8.11 Repairs & Maintenance expenditure in 2023/24 is currently forecast to budget, but it should be noted that the budget was overspent by £1.0million in 2022/23, after increasing the in-year budget by £5.0million. If expenditure on the repairs & maintenance account is similar to 2022/23, then there would be a budgetary pressure in the region of £3.2million for the year that would need to be covered by reduced expenditure elsewhere. This will not be certain until further into the financial year when a full analysis of the costs within the repairs & maintenance account has been undertaken.
- 8.12 Capital financing costs are calculated based on the assumption that interest rates will be 4.0% in all years. The business plan calculates capital financing costs increasing from £5.5million in 2023/24 to £16.0million in 2028/29 and £20.8million in 2033/34 (because of increased debt and increased interest rates). The Bank of England base rate was maintained at a low level between 2008 and 2022 but has now been increased to 5.0% (June 2023). In June 2023, local authorities could borrow at between 5.2% and 6.2% at fixed interest rates and between 5.4% and 6.0% at variable interest rates. Further increases in interest rates are forecast. If PWLB rates reached 6% that would increase capital financing costs by 50% in the long-term. The Council will therefore

<sup>1</sup> This data was calculated early in 2022 and may therefore need to be updated to reflect the increase in inflation that has been experienced since then and other factors.

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

monitor its capital financing costs closely.

### 9 Sensitivity Analysis and Stress Testing

9.1 The financial projections contained in a business plan represent the planned outcome based on a series of assumptions. These assumptions are based on what is considered to be the most likely environment in which the service will operate, including assumptions about government policy, economic variables, social circumstances and technological developments.

9.2 The business plan financial model has been used to carry out some sensitivity analysis around variables in the revenue budget and capital programme. In the base model the surplus / deficit and reserves are as follows:

	2023/24 £M's	2024/25 £M's	2025/26 £M's	2026/27 £M's	2027/28 £M's
<b>Surplus/(deficit) after appropriations</b>	1.8	-0.0	0.3	0.6	0.2
Opening reserves	7.9	9.7	9.6	10.0	10.6
<b>HRA Reserves</b>	<b>9.7</b>	<b>9.6</b>	<b>10.0</b>	<b>10.6</b>	<b>10.8</b>

9.3 If rents are assumed to increase at the same rate as inflation rather than by 0.5% more, the forecast surplus / deficit and reserves would be as follows. There is obviously a negative effect:

	2023/24 £M's	2024/25 £M's	2025/26 £M's	2026/27 £M's	2027/28 £M's
<b>Surplus/(deficit) after appropriations</b>	1.8	-0.8	-0.9	-1.0	-1.8
Opening reserves	7.9	9.7	8.9	8.0	7.0
<b>HRA Reserves</b>	<b>9.7</b>	<b>8.9</b>	<b>8.0</b>	<b>7.0</b>	<b>5.2</b>

9.4 If cost inflation is assumed to be 1% higher than the general level of inflation, the forecast surplus / deficit and reserves would be as follows. There is obviously a negative effect:

	2023/24 £M's	2024/25 £M's	2025/26 £M's	2026/27 £M's	2027/28 £M's
<b>Surplus/(deficit) after appropriations</b>	1.8	-0.2	-0.4	-0.7	-1.7
Opening reserves	7.9	9.7	9.5	9.1	8.4
<b>HRA Reserves</b>	<b>9.7</b>	<b>9.5</b>	<b>9.1</b>	<b>8.4</b>	<b>6.7</b>

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

- 9.5 Interest rates are currently increasing. If interest rates are assumed to be 1% higher than in the base model, the forecast surplus / deficit and reserves would be as follows. There is obviously a negative effect:

	2023/24 £M's	2024/25 £M's	2025/26 £M's	2026/27 £M's	2027/28 £M's
<b>Surplus/(deficit) after appropriations</b>	<b>1.8</b>	<b>-2.1</b>	<b>-2.6</b>	<b>-2.9</b>	<b>-3.6</b>
Opening reserves	7.9	9.7	7.6	4.9	2.0
HRA Reserves	<b>9.7</b>	<b>7.6</b>	<b>4.9</b>	<b>2.0</b>	<b>-1.5</b>

- 9.6 If the Council were to face a 'perfect storm' of rent increases limited to inflation, costs of management and repairs & maintenance increasing by 1% more than general inflation and a 1% increase in interest rates, the forecast surplus / deficit and reserves would be as follows. There is obviously a negative effect:

	2023/24 £M's	2024/25 £M's	2025/26 £M's	2026/27 £M's	2027/28 £M's
<b>Surplus/(deficit) after appropriations</b>	<b>1.8</b>	<b>-3.0</b>	<b>-4.5</b>	<b>-5.8</b>	<b>-7.6</b>
Opening reserves	7.9	9.7	6.6	2.1	-3.7
HRA Reserves	<b>9.7</b>	<b>6.6</b>	<b>2.1</b>	<b>-3.7</b>	<b>-11.3</b>

- 9.7 The Office for National Statistics publishes construction output price indices quarterly. The latest statistics cover the period up to September 2021. They show the following price increases for housing repair and maintenance and for new work for housing that compares as follows with the consumer prices index. It is expected that construction prices will continue to increase more rapidly than the consumer prices index:

	Consumer Prices Index	Repair & Maintenance	New Work Housing
September 2017	2.8%	1.8%	5.0%
September 2018	2.2%	1.6%	2.4%
September 2019	1.7%	1.3%	3.7%
September 2020	0.7%	0.8%	0.4%
September 2021	2.9%	4.0%	7.5%
September 2022	10.1%	5.2%	10.5%
Average increase	3.4%	2.5%	4.9%

- 9.8 Construction costs are currently increasing at an annual rate above the general level of inflation and have increased at an average annual rate of 1.5% more than the consumer prices index over the last six years.

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

9.9 If construction costs in the capital programme were to increase by 1% a year more than is assumed in the base model the forecast surplus / deficit and reserves would be as follows. There is obviously a negative effect:

	2023/24 £M's	2024/25 £M's	2025/26 £M's	2026/27 £M's	2027/28 £M's
<b>Surplus/(deficit) after appropriations</b>	<b>1.7</b>	<b>-0.3</b>	<b>-0.2</b>	<b>-0.6</b>	<b>-1.0</b>
Opening reserves	7.9	9.6	9.3	9.0	8.4
HRA Reserves	<b>9.6</b>	<b>9.3</b>	<b>9.0</b>	<b>8.4</b>	<b>7.4</b>

9.10 This sensitivity analysis illustrates the vulnerability of the business plan financial model to risk. The Council is in the process of developing a risk management strategy that will identify and quantify risks and provide for their mitigation, monitoring and management.

## 10 Financial Strategy and Planning - Capital

10.1 The Capital Programme for the first five years of the business plan is as follows:

	2023/24 £M's	2024/25 £M's	2025/26 £M's	2026/27 £M's	2027/28 £M's
Capital programme	89.3	69.7	69.5	54.1	54.0
New Build construction	16.2	26.8	65.1	-8.3	9.4
New Build ongoing capital costs	0.0	0.0	0.0	0.0	-0.2
Capital slippage	<b>105.5</b>	<b>96.4</b>	<b>134.7</b>	<b>45.8</b>	<b>63.3</b>
<b>Funded By:</b>					
MRR Opening Balance	5.6	5.6	5.6	5.6	5.6
RCCO	-5.5	-2.8	-3.8	-4.7	-8.2
Depreciation	-26.2	-26.7	-27.2	-27.7	-28.1
Borrowing	-73.8	-66.9	-103.7	-13.4	-27.0
Capital shortfall	<b>5.6</b>	<b>5.6</b>	<b>5.6</b>	<b>5.6</b>	<b>5.6</b>

10.2 The total capital programme for all the existing stock for the first five years of the business plan is as follows:

	2023/24 £,000	2024/25 £,000	2025/26 £,000	2026/27 £,000	2027/28 £,000
Planned Works & Improvements	56,449	56,449	56,449	42,968	42,968
M&E Programmed	3,164	3,164	1,800	1,000	0
Structural & Essential	4,780	0	0	0	0
Underspend Carry Forward	11,000	0	0	0	0
Efficiencies	-909	-909	-909	-909	-909
Salaries/Fees	2,822	2,822	2,822	2,148	2,148
Inflation	4,700	5,046	6,236	5,684	6,553
<b>Council Homes</b>	<b>82,006</b>	<b>66,572</b>	<b>66,398</b>	<b>50,891</b>	<b>50,760</b>
Hostels	424	433	441	450	459
Aids & Adaptations	477	487	497	507	517
LBL Acquisitions/Brockley PFI	6,365	2,164	2,207	2,251	2,296
<b>Total</b>	<b>89,272</b>	<b>69,656</b>	<b>69,543</b>	<b>54,099</b>	<b>54,033</b>

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

10.3 The capital programme for 2023/24 includes the following schemes:

	£,000	£,000
Decent Homes North	26,706	
Decent Homes South	15,563	
Decent Homes		42,269
Type 4 Remediations	4,996	
Spandrels Panels	4,942	
Sprinkler Installations	2,931	
AOV Installations	1,169	
Evacuation Alert Systems	457	
Building Safety		14,496
Hostel Refurbishments North	1,395	
Hostel Refurbishments South	2,848	
Hostel Refurbishments Sheltered schemes	1,500	
Hostel Refurbishments		5,744
Lift Programme	2,500	
Domestic Central Heating	1,000	
Commercial Heating	1,000	
Door Entry / Warden Call	955	
Laundries	45	
M&E Compliance Works		5,500
Special Projects North	1,000	
Special Projects South	1,000	
Special Projects		2,000
Sustainability – Street Properties		1,200
Fire related works		920
Capitalised repairs and voids	5,000	
Capitalised salaries	2,500	
Capitalisations		7,500
Contingencies	1,000	
Fees	500	
Other		1,500
Unidentified		878
Total		82,006

10.4 It will be noted that the capital programme provided for in the business plan declines after 2023/24 to reach £54.0million in 2027/28. Moving forward, the Council will therefore need to prioritise key capital schemes and defer others.

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

### 11 The New Build Programme

11.1 In January 2020, the Mayor and Cabinet approved recommendations to advance and expand the Council's 'Building for Lewisham' programme to meet the corporate objectives set for the period between 2018 and 2022. This includes a target of building 1,000 social homes through direct delivery and the partnership programme. It has been decided to approve schemes up to a negative net present value of £20million.

11.2 The business plan model contains the following for the new build:

Expenditure heading	2023/24 £,000	2024/25 £,000	2025/26 £,000	2026/27 £,000	2027/28 £,000
Build Costs	-£20,980	-£22,693	-£84,040	£118,017	-£49,457
GLA Grant Received	4,388	14,623	36,122	17,311	7,377
One-4-One Replacement Funding	916	3,697	16,672	24,251	10306
Other Subsidy	901	970	984	96	0
Sale Receipts	4,342	0	0	16,312	17,117
<b>Net Build Costs</b>	<b>-10,433</b>	<b>-3,403</b>	<b>-30,262</b>	<b>-60,047</b>	<b>-14,657</b>

11.3 The following schemes are included in the programme for 2023/24:

Scheme	£000's
Achilles Street - Development ( Design Work) -	962
Algernon/Embleton Road (Phase 3)	545
Bampton (EG17)	3,488
Buy Back Lewisham's ex- council homes LBL	2,022
Creekside Acquisition	1,640
Dacres Road ( Phase 1) (Pack 4) SE23 2PD	200
Drakes Court ( Pack 2) SE23 3LY	24
Elderton Road Garages ( Pack 5) SE26 4EY	450
Eliot Bank (Forest Estate) (Phase 3)-AKA Knapdale Close	148
Endwell Road (Phase 3)	1,884
Fairlawn Pry Sch Annexe ( Pack 5 Sub.) SE23 3XP	62
Grace Path (Phase 3)	83
Greystead Road Estate ( Pack 2) SE23 3SE	228
Hensford Gardens ( Pack4) SE6 6JG	51

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

Home park housing	570
Kenton Court (Phase 3)	385
Ladywell Leisure Centre	
Development site ( 1,000 Homes Prog.)( Place/Ladywell)	301
Longfield Crescent (Phase 2)	65
Marnock Road (Phase 3)	81
Mayfield-Arcadis 23 July	541
New Cross Road Acquisition 52-54	4,663
Silverdale Hall (Phase 3)	180
Sommerville Phase 1 (Extra Care) (Phase 3)	98
Valentine Court ( Phase 1) (Pack 4) SE23 2LH	623
Walsham House Garages ( Pack 5) SE14 5LR	1,344
Thomas Lane Yard	75
Willow Way	70
Parker House	200
Total	20,980

11.4 The Council's new build schemes fall into four categories as follows:

- On site/complete – these are schemes where the Council has entered into the construction contract and therefore are committed to the Total Scheme Costs and NPV that are set out.
- Planning – these are schemes at an advanced stage of design and planning with consultant teams appointed to take the scheme to planning submission and to procure a contractor. There will have been public commitment made about delivery and active consultation on these sites. The Total Scheme Costs and NPV are a forecast. No contract is in place for the construction of the scheme although the procurement process may be underway.
- Approved pipeline - these are schemes at an earlier stage of design and planning with consultant teams appointed to take the scheme to planning submission and to procure a contractor. There will have been public commitment made about delivery and active consultation on these sites. The Total Scheme Costs and NPV are a forecast. No contract is in place for the construction of the scheme although the procurement process may be underway.
- Unapproved pipeline – these are schemes at an early capacity study / feasibility stage. No commitment has been made to deliver these schemes. These are the potential pipeline of future schemes.

11.5 It is considered that only the first three categories of scheme should be provided for in the housing revenue account business plan.

11.6 The business plan model contains the following revenue implications of the new build programme:

2023/24	2024/25	2025/26	2026/27	2027/28
£,000	£,000	£,000	£,000	£,000

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

Rent	-2,904	-3,641	-5,137	-9,606	-10,418
Income	-2,904	-3,641	-5,137	-9,606	-10,418
Management	1,000	973	1,407	2,761	3,005
Repairs	145	148	151	154	157
Interest <sup>2</sup>	325	1,185	3,024	4,161	4,184
Expenditure & Depreciation	1,470	2,306	4,582	7,076	7,346
Surplus	-1,434	-1,335	-555	-2,530	-3,072

- 11.7 The financial model shows the new build programme making a net contribution to the housing revenue account. It calculates interest based on assumed levels of borrowing and rates of interest (see above) and the figures shown here assume that the net cost of new build that is charged to the capital programme will be funded by borrowing<sup>3</sup>.
- 11.8 It is a statutory requirement to calculate depreciation on housing revenue account stock and to transfer this into the major repairs reserve from where it can be used to fund major repairs. Where there is new stock with a minimal or no need to carry out major repairs during the early years this has the effect of creating a sinking fund that will be available when major repairs are eventually required. However, depreciation is not shown in this calculation. Repairs costs also appear to be low.
- 11.9 Revenue income and expenditure is considered when carrying out appraisals of new schemes before their inclusion in the programme as part of the calculation of net present value. The Council will continue to monitor the effect of the new build programme on the housing revenue account.

## 12 Issues and Risks

- 12.1 Issues and Risks can be summarised as follows:

Number	Issue	Importance
1.1	Complying with Decent Homes Standard	Statutory Requirement
1.2	Refurbishment of Tower Blocks & Replacement of Lifts	Statutory Requirement
1.3	Meet obligations for building safety, fire precautions and electrical safety.	Statutory Requirement
1.4	Environmental Sustainability, SAP ratings & Zero Carbon targets (statutory targets)	Statutory Requirement
2.1	Complying with Consumer Standards	Regulatory Requirement
3.1	Delivering Catford & Lewisham Regeneration Projects	Contractual Obligations

<sup>2</sup> Estimated cost of borrowing from 2023/24 onwards.

<sup>3</sup> The expenditure may be funded from other resources but in this case there would be an opportunity cost, meaning that the use of the cost of borrowing in this analysis continues to be appropriate.

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

4.1	Delivering the Building for Lewisham Programme	Mayor's Priority
4.2	Investing in betterment, the environment, the common realm and to address social stigma.	Mayor's Priority
4.3	Improvements to sheltered housing and installation of aids and adaptations.	Mayor's Priority
4.4	Environmental Sustainability, SAP ratings & Zero Carbon targets (local targets)	Mayor's Priority
5.1	Cost of Living Crisis, Welfare Reform & Affordability	Protecting tenants and maintaining income
6.1	Risk that carbon reduction works suffer due to the other pressures for works for building safety and basic upkeep of the stock.	Risk

### 13 The Voluntary Code

13.1 The Chartered Institute of Public Finance & Accountancy and Chartered Institute of Housing have published a 'Voluntary Code for the Self-Financed Housing Revenue Account'. The Council has compared practice at London Borough of Lewisham with the principles and provisions of the code and have concluded that there may be some areas where performance could be improved.

13.2 The Council has therefore decided to:

- Ensure that they have a full understanding of the need to invest in major repairs, repairs and maintenance of the existing stock in the short, medium and long-term and that the business plan financial model and budget contain adequate provision to meet these needs.
- Regularly update the stock condition survey and asset management plan to ensure that all necessary works are identified and provision made to carry them out; thus ensuring that the stock condition survey, asset management plan and business plan are fully integrated.
- Ensure that they have a full understanding of the capital and revenue costs of development schemes and are confident that they are affordable before they are approved.
- Consult with tenants and other stakeholders about the business plan, including the asset management standards, and makes arrangements to report regularly to tenants on compliance with the plan.
- Carry out sensitivity analysis and stress testing to test the robustness of the business plan financial projections.
- Develop a risk management system specifically for the housing revenue account.
- Consider alternative delivery vehicles for new social and affordable housing including housing companies.

### 14 Options that are available to the Council

14.1 The Council is reviewing development options as resources in the housing revenue

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

account are constrained and a considerable amount of new housing is needed.

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## APPENDIX Y1: 2024/25 Budget Reductions – Previously Agreed

2024/25 Budget Reductions – December 2020, February 2021, and February 2022

Reference	Proposal	2024/25 (£'000)
D-10	Commercial Estate Review	100
D-12	Asset Use Review and Regularisation	85
D-14	Facilities Management	10
	<b>Total</b>	<b>195</b>

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

### 2024/25 Budget Reductions – December 2022

#### Member Decisions:

Reference	Directorate	Proposal	2024/25 (£'000)
HRPR_INC_01	HRPR	Additional Yellow Box Junction Enforcement & Moving Traffic Contravention by CCTV	295
HRPR_INC_02	HRPR	Replacement Bin Charging	-25
HRPR_INC_06	HRPR	Review of fees charged for Garages	70
HRPR_SAV_01	HRPR	Temporary Accommodation Cost Reduction	300
HRPR_SAV_02	HRPR	Road Safety Service Review	70
		<b>Total</b>	<b>710</b>

#### Officer Decisions:

Reference	Directorate	Proposal	2024/25 (£'000)
HRPR_INC_08	HRPR	Housing Programme Commercial Units' Income Generation	75
HRPR_SAV_03	HRPR	Increased recharging of salary costs to capital	30
HRPR_SAV_05	HRPR	Utilisation of UKSPF grant funding to reduce the general fund burden for the service.	5
COM_SAV_02	COM	Delegation of Care Plan Budgets to Operation Managers	300
COM_SAV_04	COM	ASC Empowering Lewisham	1,000
		<b>Total</b>	<b>1,410</b>

**Total Previously Agreed Savings (£'000)**

**2,315**

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**APPENDIX Y2: 2024/25 Budget Reductions – January 2023/24**

**Y2a: MEMBER DECISIONS**

**Summary**

Directorate	Saving Reference	2024/25 Saving (£'000)	Deliverability (%)	2024/25 Net Saving (£'000)	Directorate Total (£'000)
Directorate of Children & Young People	CYP13 – FQC Sale of Capital Asset	850.00	70%	595.00	
Directorate of Children & Young People	CYP14 – FQC Children’s Centre Revenue	50.00	70%	35.00	
<b>Directorate of Children &amp; Young People</b>					<b>630.00</b>
Directorate of Community Services	COM11 – Bereavement Services Fees and Charges	100.00	100%	100.00	
<b>Directorate of Community Services</b>					<b>100.00</b>
Directorate of Place	PLA03 – Fly-Tipping Fees and Charges	50.00	60%	30.00	
Directorate of Place	PLA04 – Garage Portfolio Rental Charges Review	90.00	90%	81.00	
Directorate of Place	PLA07 – Seasonal Street Cleansing	40.00	90%	36.00	
<b>Directorate of Place</b>					<b>147.00</b>
<b>Member Decisions</b>					<b>877.00</b>

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

### Proformas

<b>Directorate</b>	CYPS - FQC				
<b>Director</b>	Sara Rahman (Pinaki Ghoshal – Executive Director)				
<b>Service area</b>	FQC				
<b>Cabinet Portfolio</b>	Children & Young People- Cllr Barnham				
<b>Reference</b>	CYP11 - FQC Reduction in Business Support CYP12 – FQC Grant Maximisation CYP13 – FQC Sale of Capital Asset CYP14 – FQC Children’s Centre Revenue CYP15 – FQC Staffing Costs Reduction				
<b>Cut title</b>	<p>1. <u>Reduction in Business Support to FQC.</u> Following changes in responsibilities across both Children’s Social Care and Families Quality &amp; Commissioning changes in business support. In addition grant funding will be used for some of the administrative support where appropriate</p> <p>2. <u>Grant maximisation (inc Children’s Centres).</u> Increasingly Families Quality &amp; Commissioning have been in receipt of a range of different grants, including the Family Hub grants and Enhance grants from the DfE. Other smaller grants from the VRU have also been gained. Some substitution of spend is possible here. In addition there is a review of spend within both the overlapping Children’s Centre and Family Hubs programmes</p> <p>3. <u>Sale of a capital asset (one off).</u> The directorate has continued responsibility for a building in Honour Oak (Honour Oak Depot), which historically was used to support Children’s Centre delivery. It has not been doing this for some years and is currently used for accommodating a small service which could be delivered elsewhere. The building is within the Honour Oak estate (and Opposite the Honour Oak Youth Centre which is about to become a Family Hub. It is valued at £850k. Given its location it would be suitable to be redeveloped for social housing (HRA funding) or temporary accommodation</p> <p>4. <u>Children’s Centre Revenue saving.</u> With the changes to service delivery there is expected to be a permanent saving of running costs for a current Children’s Centre</p> <p>5. <u>Reduction in staffing costs (one off).</u> The division has already been managing with a number of vacant posts following previous restructures. It is projected that this will deliver an additional saving of £350k over and above previous projections. Once off</p>				
<b>Description of cut</b> (including any specific elements or phasing to be considered)	<b>Saving</b>	<b>2023/24</b>	<b>2024/25</b>	<b>2025/26</b>	<b>Total</b>
	FQC 1	0	100	0	<b>£100</b>
	FQC 2	150	0	0	<b>£150</b>
	FQC 3*	0	850	0	<b>£850</b>
	FQC 4	0	50	0	<b>£50</b>
	FQC 5*	350	0	0	<b>£350</b>
	<b>TOTAL</b>	<b>500</b>	<b>1000</b>	<b>0</b>	<b>£1500</b>

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

*Denotes one off savings				
Division budget	Gross £k	15,141	Net £k	8,328
Service area budget	Gross £k	15,141	Net £k	8,328
Savings proposed	2023/24 £k	£500k	2024/25 £k 2025/26 £k	£1m £0
<b>Risks:</b>				
Cost shunt to other service? Y/N	No			
Likelihood of making cut in full - %	70%			
Impact of making the cut	FQC 1: Potential impact on business support capacity – low risk FQC 3 : This assumes the sale of a capital asset as a one off cost saving to the General Fund FQC 2 & 4 : Some political sensitivities given the reduction in Children Centre delivery – however, off set by increase in Family Hub delivery			
Possible risk mitigation	See above			
<b>Other considerations:</b>				
Member or Officer decision	Most are Officer BUT Member decision re Children’s Centre and Asset sale			
Redundancies	Y/N	N	Number of staff	
Public consultation	Y/N	N	Audience(s)	
Investment required (value of cut shown above should be net of this investment)	Y/N	N	Cost £k	N
	In what:			
Contingent on other actions / decisions / cross service work				
Specific legal or statutory considerations				

## Equalities Screening Template

For each of the nine protected characteristics, identify whether the proposal has a high, medium, low or neutral impact on service users and whether this is a positive or negative impact.

Identify whether the proposal has a high, medium, low or neutral impact on socio-economic inequality (e.g. low income, fuel poverty, food insecurity, digital inclusion etc) and whether this is a positive or negative impact.

Identify whether a full service equalities analysis assessment is required for this proposal based on this Equalities Analysis Toolkit. For advice on whether an EAA is required and how to assess service equalities impact please contact [policy@lewisham.gov.uk](mailto:policy@lewisham.gov.uk)

### Impact & Outcomes

What is the likely impact of the proposed changes?

Service Users

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

Include evidence to support anticipated impacts, both positive and negative.

Savings proposal 1 (FQC1): Positive Impact– Changes in business support responsibilities across Children’s Social Care and Families, Quality and Commissioning are ongoing, which will ensure a consistent level of business support across the division. Saving efficiencies within FQC due to changes to ways of working will not impact service users negatively.

Savings proposal 2 (FQC 2): Neutral Impact – FQC are in receipt of a range of grants. Service users will experience no change in service delivery resulting in the maximisation of grant fundings and the reduced need for General Fund.

Savings proposal 3 (FQC 3): Neutral Impact – Discussions are at an early stage regarding plans for the disposal/sale of the site. Whilst no decision has been made yet, plans to relocate the small service, currently based on site, will ensure delivery from another location and therefore will have no negative impact on service users.

Savings proposal 4 (FQC 4): Positive Impact – plans to redesign service delivery from Children and Family Centres are currently underway. These changes will create a seamless and consistent offer of support that will further prevent inequality of access to service provision. The overall impact for service users will be positive with anticipated increase in access and more targeted provision to ensure we reach and engage more families from communities not currently accessing existing provision.

Savings proposal 5 (FQC 5): Neutral Impact – The division will continue to maintain existing vacancies. Service users will not be directly impacted as there will be no changes to service delivery.

### Staff

Include evidence to support anticipated impacts, both positive and negative.

Savings proposal 1. (FQC1): Positive Impact – Changes in business support responsibilities across Children’s Social Care and Families, Quality and Commissioning are ongoing, which will ensure a consistent level of business support across the division, create efficiencies and identify gaps and/or duplication in ways of working. Efficiencies within FQC business support function due to changes to ways of working will not impact staff negatively and there are no redundancies expected.

Savings proposal 2 (FQC 2): Neutral Impact – FQC are in receipt of a range of grants. Staff will experience no change in service delivery or ways of working resulting in the maximisation of grant fundings and the reduced need for General Fund.

Savings proposal 3 (FQC 3): Neutral Impact – Discussions are at an early stage regarding plans for the disposal/sale of the site. Whilst no decision has been made yet, plans to relocate the small service, currently based on site, will ensure delivery from another location and therefore will have no negative impact on staff.

Savings proposal 4 (FQC 4): Neutral Impact – plans to redesign service delivery from Children and Family Centres are currently underway. These changes will create a seamless and consistent offer of support that will further prevent inequality of access to service provision. The redesign will have no direct impact on council staff.

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

Savings proposal 5 (FQC 5): Neutral Impact – The division will continue to maintain existing vacancies. Service users will not be directly impacted as there will be no changes to service delivery.

### Other Council Services

Protected characteristics and other equalities considerations	High (Positive / Negative)	Medium (Positive / Negative)	Low (Positive / Negative)	Neutral
Age				X No specific impact
Disability				X No specific impact
Ethnicity		X For some CYP in care being able to remain in their community, not placed elsewhere in the country that have less cultural/racial diversity.		
Gender				X No specific impact
Gender reassignment				X No specific impact
Marriage and civil partnerships				X No specific impact
Pregnancy and maternity				X No specific impact
Religion and belief				X No specific impact
Sexual orientation				X No specific impact
Socio-economic inequality				X No specific impact
Is a full EAA required?			Y (See notes above)	

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

	Communities, Partnership and Leisure			
<b>Director</b>	James Lee			
<b>Service area</b>	Bereavement Services			
<b>Cabinet Portfolio</b>	Communities, Refugees - Cllr Campbell			
<b>Reference</b>	COM11 - Bereavement Services Fees and Charges			
<b>Saving title</b>	In-year overspend savings proposal			
<b>Description of saving</b> (including any specific elements or phasing to be considered)	Implementation of 2023-24 fees and charges in line with other Coronial Consortium Burial and Cremation Authorities has achieved an overachievement on income, this overachievement will be offset to achieve an underspend of 100k in year 2023/24 to support a balanced budget and a permanent underspend for 2024/25.			
<b>Division budget</b>	<b>Gross £k</b>	29,249	<b>Net £k</b>	14,144
<b>Service area budget</b>	<b>Gross £k</b>	2,521	<b>Net £k</b>	-288
<b>Saving proposed</b>	<b>2023/24 £k</b>	<b>100</b>	<b>2024/25 £k</b>	<b>100</b>
<b>Risks:</b>				
<b>Cost shunt to other service? N</b>	No			
<b>Likelihood of making cut in full - %</b>	100%			
<b>Impact of making the saving</b>	The use of overachieved income through fees and charges may result in the service not being able to spend on improvements or new equipment or offset against any unexpected expenditure, however this can be managed via the revenue budgets or through business case, on a case by case basis, where required.			
<b>Possible risk mitigation</b>	An unexpected drop in Lewisham deaths.			
<b>Other considerations:</b>				
<b>Member or Officer decision</b>	Member			
<b>Redundancies</b>	N	None		
<b>Public consultation</b>	N	None required		
<b>Investment required</b> (value of saving shown above should be net of this investment)	N	None	<b>Cost £k</b>	
	<b>In what:</b>			
<b>Contingent on other actions / decisions / cross service work</b>	None			
<b>Specific legal or statutory considerations</b>	None			

### Impact & Outcomes

What is the likely impact of the proposed changes?

Service Users

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

No impact, however, increasing fees and charges must be managed carefully to prevent Socio-economic inequality, cost variety must be considered to ensure funeral services are affordable for all. Increasing fees and charges must be in line with finance recommendations to achieve full cost recovery incl overheads and not to generate profit and recover overspend. These savings proposals are based on surplus income achieved through an increase in Lewisham deaths.

### Staff

Positive impact, offering surplus income to support balance budget means that staffing levels can be maintained and no change to working conditions, however these are regularly reviewed to ensure the service remains cost effective and sustainable

### Other Council Services

No impact

### Partners

No impact

**Are there any specific equalities implications? Please provide a response for each protected characteristic/equalities consideration, even if the impact is neutral.**

Protected characteristics and other equalities considerations	High (Positive / Negative)	Medium (Positive / Negative)	Low (Positive / Negative)	Neutral
Age				x
Disability				x
Ethnicity				x
Gender				x
Gender reassignment				x
Marriage and civil partnerships				x
Pregnancy and maternity				x
Religion and belief				x
Sexual orientation				x
Socio-economic inequality			x	
<b>Is a full EAA required?</b>			No	

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

<b>Directorate</b>	Place		
<b>Director</b>	Zahur Khan		
<b>Service area</b>	Commercial Operations and Development		
<b>Cabinet Portfolio</b>	Environment and Climate Action- Cllr Krupski		
<b>Reference</b>	PLA03 – Fly-Tipping Fees and Charges		
<b>Saving title</b>	Fees and Charges (Increased penalties for fly tipping and littering)		
<b>Description of saving</b> (including any specific elements or phasing to be considered)	<p>In July 2023, the Environmental Offences (Fixed Penalties) Amendment 2023 increased the upper and lower limits for fixed penalty notices issued for fly tipping and littering offences. Lower limit for littering increased from £90 to £150, upper limit from £150 to £500. Lower limit for fly tipping increased from £250 to £400, upper limit from £400 to £1000.</p> <p>It is proposed to for the council to adopt these higher limits to support policies to reduce flytipping across the borough.</p> <p>The increases reflect the seriousness of the impact of environmental crime on local people and neighbourhoods.</p> <p>The decision to increase the fixed penalty must be taken before the increased amounts can be used.</p>		
<b>Division budget</b>	<b>Gross £k</b>		<b>Net £k</b>
<b>Service area budget</b>	<b>Gross £k</b>		<b>Net £k</b>
<b>Saving proposed</b>	<b>2023/24 £k</b>		<b>2024/25 £k</b> <b>50</b>
<b>Risks:</b>			
<b>Cost shunt to other service? Y/N</b>	N		
<b>Likelihood of making cut in full - %</b>	60%		
<b>Impact of making the saving</b>	Tackling the root cause of littering/fly tipping by issuing penalties that reflect the seriousness of the crime, thus encouraging less littering/fly tipping.		
<b>Possible risk mitigation</b>	<p>Increased non-payment of fixed penalty notices during the cost-of-living crisis could be mitigated by offering a payment plan.</p> <p>The council can prosecute for the original offence if a FPN is not accepted or not paid.</p> <p>A positive communication campaign will be developed/delivered with key messages encouraging responsible waste management and warning of the penalties for environmental crime.</p>		
<b>Other considerations:</b>			
<b>Member or Officer decision</b>	Member		
<b>Redundancies</b>	<b>Y/N</b>	N	<b>Number of staff</b> 0
<b>Public consultation</b>	<b>Y/N</b>	N	<b>Audience(s)</b>
<b>Investment required</b> (value of saving shown above should be net of this investment)	<b>Y/N</b>	N	<b>Cost £k</b>
	<b>In what:</b>	0	
<b>Contingent on other actions / decisions / cross service work</b>	Mayor and Cabinet decision to set increased limits		
<b>Specific legal or statutory considerations</b>	<p>The Environmental Offences (Fixed Penalties) Amendment 2023 increased the upper &amp; lower limits for fixed penalty notices for fly tipping and littering.</p> <p>Environmental Protection Act 1990 S33 Fly tipping</p> <p>Environmental Protection Act 1990 S87 littering</p>		

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

Equalities Screening for Increased penalties for fly tipping and litter fixed penalty notices

<b>Impact &amp; Outcomes</b>				
<b>What is the likely impact of the proposed changes?</b>				
<b>Service Users</b>				
<p>Satisfactory progress has been made in promoting Cleaner Lewisham and the council has invested money and resources to tackle the anti-social/illegal behaviour of those engaged with fly tipping and littering.</p> <p>The enviro-crime enforcement team take a balanced, consistent, proportionate, and fair approach when dealing with those caught littering/fly tipping.</p> <p>The increased fines for littering and fly tipping reflect the seriousness of the impact of environmental crime on local people and neighbourhoods.</p> <p>Income achieved from fixed penalty notices must go back into the service/ used for initiatives to tackle fly tipping.</p> <p>Fly tipping/littering is not acceptable behaviour and there is unlikely to be support for people who receive FPN for offences of this type.</p> <p>There may be an increase in the non-payment of fixed penalty notices during the cost-of-living crisis, this can be mitigated by the council prosecuting for the original offence if an FPN is not accepted or not paid.</p> <p>A positive communication campaign will be developed/delivered with key messages encouraging responsible waste management and warning of the penalties for environmental crime.</p>				
<b>Staff</b>				
<p>The service will enable targeted enforcement action to areas of concern, resulting in cleaner streets and positive action against those engaged in littering/fly tipping.</p> <p>The officers are trained and act in accordance with environmental protection guidance and council policy.</p> <p>The enviro-crime enforcement team already issue fixed penalty notices for littering and fly tipping and other environmental offences.</p> <p>The officers will receive refresher training on how to engage with people and de-escalate conflict when issuing the increased amount fixed penalty notices.</p>				
<b>Other Council Services</b>				
None				
<b>Partners</b>				
None				
<b>Are there any specific equalities implications? Please provide a response for each protected characteristic/equalities consideration, even if the impact is neutral.</b>				
<b>Protected characteristics and other equalities considerations</b>	<b>High (Positive / Negative)</b>	<b>Medium (Positive / Negative)</b>	<b>Low (Positive / Negative)</b>	<b>Neutral</b>
<b>Age</b>				X
<b>Disability</b>				X
<b>Ethnicity</b>				X
<b>Gender</b>				X

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**APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)**

<b>Gender reassignment</b>				X
<b>Marriage and civil partnerships</b>				X
<b>Pregnancy and maternity</b>				X
<b>Religion and belief</b>				X
<b>Sexual orientation</b>				X
<b>Socio-economic inequality</b>				X
<b>Is a full EAA required?</b>			No. Officers already deliver fixed penalty notices for littering and fly tipping in accordance with guidance and council policy.	

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

<b>Directorate</b>	Place
<b>Director</b>	Patrick Dubeck
<b>Service area</b>	Inclusive Regeneration
<b>Cabinet Portfolio</b>	Cllr Brenda Dacres
<b>Reference</b>	PLA04 – Garage Portfolio Rental Charges Review
<b>Saving title</b>	Garage Portfolio Rental Charges Review
<b>Description of saving</b> (including any specific elements or phasing to be considered)	<p>There are approximately 134 Council garage sites in the borough, comprising 182 garage blocks. There are approximately 2,379 individual garages. Approximately 1,801 of the garages are let to Council housing tenants and 578 are let to non-Council social housing tenants. The current waiting list for garages is over in excess of 2000 applicants. The portfolio currently has a high void rate mainly due to the condition of some of the stock.</p> <p>Taken together, the garage portfolio is projected to generate income to the general fund of approximately £1.4M in 2023/24.</p> <p>The current charging regime for garages is such that, a housing tenant with LB Lewisham pays a basic rate 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 although this is entirely discretionary.</p> <p>Garages are not a core social dwelling provision and therefore can be charged at a higher level. The Council's current approach to garage rent setting has been to increase rents annually based on inflation using the retail price index (RPI). In 2023/24, rents were increased by 10% (a rate, lower than the rate of inflation at the time).</p> <p>Even with this increase, the current highest rent charged this year (2023/24) is £27.39 per week (approximately £110 p/m) and the lowest is £4.67 per week (less than £20 p/m). 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.</p> <p>As a comparator, garage rent levels in neighbouring boroughs are for the 2020/21 financial year were charged at:</p> <ul style="list-style-type: none"> <li>• <u>Southwark</u> - £22.40 p/w (Council tenants / leaseholders / resident freeholders who qualify). £17.40 p/w for 70+ year olds / those with mobility allowance. £39.20 p/w (private flat rate);</li> <li>• <u>Islington</u> - Charges are based on emissions. £10.65 p/w for A rated up to £23.43 p/w for D rated for Council tenants. Charges are based on emissions for non-Council tenants. £23.94 p/w for A rated up to £52.56 p/w for D rated for everyone else.</li> <li>• <u>Camden</u> - Depends on the postcode address £25p/w - £50 p/w.</li> </ul> <p>It is clear from the above that garage rents in Lewisham is far less than other neighbouring or inner London boroughs.</p>

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

	<p>Historically, garage rents have been increased by RPI. Last year, it was agreed that the rents for 2023/24 be increased at 10% which was lower than the RPI of 14% at the time the proposal was agreed. This year, it proposed to revert to the historical method of using RPI which is currently 8.9% for the 2024/25 financial year. An increase of 8.9% would mean an average rise of £1.63 per week on the cost of renting a garage from the Council and will generate an estimated gross income of approximately £190k (£150k with Blue Badge and other discounts). This means with the Blue Badge Discount applied and noting already agreed income target from last year, the net increase for 2024/25 financial year will be £90k.</p> <p>It is also proposing a comprehensive review of the garage portfolio over the coming year. The review will provide a greater understanding of the condition of the garages and an assessment of whether there is a need for investment which will ensure the Council derives the maximum it can from their use. It will also help ensure voids are kept to a minimum.</p> <p>Further, the review will allow for an assessment of whether the Council could consider location-based charging for garages which will reflect general housing rental levels across the borough. There will also be some consideration given to reviewing their use in some location to determine whether other more beneficial uses can be generated from them.</p>			
Division budget	Gross £k		Net £k	
Service area budget	Gross £k		Net £k	
Saving proposed	2023/24 £k	£0	2024/25 £k	£90
<b>Risks:</b>				
Cost shunt to other service? Y/N		If 'yes' identify the service impacted.		
Likelihood of making cut in full - %		90%		
Impact of making the saving	There is no direct impact on Council services and staff.			
Possible risk mitigation	<p><b>Proposed rent increase not approved:</b> The Council's approach over at least the past 5-years (except last year), has been to increase rent in line with RPI. Last year the Council departed from that approach by increasing garage rent by 10% (which was below RPI). This proposal is seeking a reversion to the RPI model.</p> <p><b>Estimated Income not being achieved:</b> The profiled income has been set out to reflect the fact that there is already £70k increase previously agreed for 2024/25 so the net added for 2024/5 is £90k. Also, the proposed review and investment in the portfolio will help reduce voids thereby increasing lets and income and adopting a location-based rent setting beyond the norm for future years will help increase income overall.</p>			
<b>Other considerations:</b>				
Member or Officer decision	Member			

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<b>Redundancies</b>	Y/N	N	<b>Number of staff</b>	N/A
<b>Public consultation</b>	Y/N	Y	<b>Audience(s)</b>	N/A
<b>Investment required</b> (value of saving shown above should be net of this investment)	Y/N	N	<b>Cost £k</b>	N/A
	<b>In what:</b>	N/A		
<b>Contingent on other actions / decisions / cross service work</b>				
<b>Specific legal or statutory considerations</b>	None. However, it is expected that there will be a call on internal legal resources to negotiate the lettings.			

## Equalities Screening Template

For each of the nine protected characteristics, identify whether the proposal has a high, medium, low or neutral impact on service users and whether this is a positive or negative impact.

Identify whether the proposal has a high, medium, low or neutral impact on socio-economic inequality (e.g. low income, fuel poverty, food insecurity, digital inclusion etc) and whether this is a positive or negative impact.

Identify whether a full service equalities analysis assessment is required for this proposal based on this Equalities Analysis Toolkit. For advice on whether an EAA is required and how to assess service equalities impact please contact

[policy@lewisham.gov.uk](mailto:policy@lewisham.gov.uk)

### Impact & Outcomes

**What is the likely impact of the proposed changes?**

#### Service Users

The proposed increase of garage rents by 8.9% in 2024/25 is likely to have a negative impact on the elderly, disabled and low-income households. Overall, the proposed increase will add an average of £1.63 per week on the cost of renting a garage unit from the Council. To mitigate the impact on the elderly and disabled, the Council offers that group a £50% discount on their garage rent.

#### Staff

N/A

#### Other Council Services

N/A

#### Partners

N/A

**Are there any specific equalities implications? Please provide a response for each protected characteristic/equalities consideration, even if the impact is neutral.**

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**APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)**

<b>Protected characteristics and other equalities considerations</b>	<b>High (Positive / Negative)</b>	<b>Medium (Positive / Negative)</b>	<b>Low (Positive / Negative)</b>	<b>Neutral</b>
<b>Age</b>			Low Negative	
<b>Disability</b>			Low Negative	
<b>Ethnicity</b>				Neutral
<b>Gender</b>				Neutral
<b>Gender reassignment</b>				Neutral
<b>Marriage and civil partnerships</b>				Neutral
<b>Pregnancy and maternity</b>				Neutral
<b>Religion and belief</b>				Neutral
<b>Sexual orientation</b>				Neutral
<b>Socio-economic inequality</b>			Low Negative	
<b>Is a full EAA required?</b>			N	

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

<b>Directorate</b>	Place		
<b>Director</b>	Zahur Khan		
<b>Service area</b>	Street Environment Services		
<b>Cabinet Portfolio</b>	Environment and Climate Action- Cllr Krupsk		
<b>Reference</b>	PLA07 – Seasonal Street Cleansing		
<b>Saving title</b>	Seasonal street cleansing regime		
<b>Description of saving</b> (including any specific elements or phasing to be considered)	<p>To introduce a seasonal based street cleansing regime on residential streets across the borough to reduce the cost during the winter months when demand is lower. During the winter months after the leaf fall season (Dec-Mar) there is less pedestrian footfall and reduced amounts of litter to be swept up and collected from residential roads. Instead of relying on a scheduled all-year round cleansing regime of sweeping residential roads, the service will monitor streets and direct cleansing staff to areas on a needs basis to ensure a clean street environment.</p> <p>This pro-active approach will reduce the number of agency staff needed daily during the winter period.</p>		
<b>Division budget</b>	<b>Gross £k</b>		<b>Net £k</b>
<b>Service area budget</b>	<b>Gross £k</b>		<b>Net £k</b>
<b>Saving proposed</b>	<b>2023/24 £k</b>	<b>40</b>	<b>2024/25 £k</b>
			<b>40</b>
<b>Risks:</b>			
<b>Cost shunt to other service? Y/N</b>	N		
<b>Likelihood of making cut in full - %</b>	90%		
<b>Impact of making the saving</b>	<p>Less visible presence of street cleaning operatives in residential areas with a reduced amount of street cleaning activity during the winter period. Winter months and reduced daylight hours means less pedestrian footfall, and subsequent amounts of litter. Streets would be litter picked instead of swept. Litter bin emptying and primary/secondary retail areas would not be affected by the changes.</p> <p>No direct HR implications for LBL employees as staff affected would be agency only.</p> <p>If change is agreed and effective then this would be a future saving as winter rota could reflect changed methodology to cleansing.</p>		
<b>Possible risk mitigation</b>	<p>The service will direct staff to areas of cleansing need. Litter picking is an effective alternative to sweeping during adverse weather conditions. Complaints and ad-hoc spillages would be given priority attention.</p>		
<b>Other considerations:</b>			
<b>Member or Officer decision</b>	Member		
<b>Redundancies</b>	<b>Y/N</b>	<b>N</b>	<b>Number of staff</b>
			<b>0</b>
<b>Public consultation</b>	<b>Y/N</b>	<b>N</b>	<b>Audience(s)</b>
<b>Investment required</b> (value of saving shown above should be net of this investment)	<b>Y/N</b>	<b>N</b>	<b>Cost £k</b>
	<b>In what:</b>		
<b>Contingent on other actions / decisions / cross service work</b>	N/A		

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

<b>Specific legal or statutory considerations</b>	Environmental Protection Act 1990 – local authorities must keep public areas clean. Litter picking is an effective alternative to pavement sweeping during adverse weather conditions.
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### Equalities Screening for Seasonal Street Cleansing Regime

<b>Impact &amp; Outcomes</b>				
<b>What is the likely impact of the proposed changes?</b>				
<b>Service Users</b>				
<p>During the winter months after the leaf fall season (Dec-Mar) there is less pedestrian footfall and consequently reduced amounts of litter to be swept up and collected from residential roads. Changes will result in a more efficient value for money service and directed services to deal with areas on a need to clean basis only.</p> <p>Less visible presence of street cleansing staff on residential roads.</p> <p>Litter picking of road may take longer than residents expected timeframe – residents are aware of when the roads are swept currently and may notice the change in frequency.</p>				
<b>Staff</b>				
<p>Instead of relying on a scheduled all-year round cleansing regime of residential roads, the area street cleansing managers will constantly monitor their streets and direct cleansing staff to areas on a needs basis to ensure a clean street environment.</p> <p>No impact to staff - staff will receive more direction and specific task allocation from supervisors.</p> <p>Anticipated reduction in staffing to be offset in less agency expenditure.</p> <p>Reduction in agency staff during winter season.</p>				
<b>Other Council Services</b>				
None				
<b>Partners</b>				
None				
<b>Are there any specific equalities implications? Please provide a response for each protected characteristic/equalities consideration, even if the impact is neutral.</b>				
Protected characteristics and other equalities considerations	High (Positive / Negative)	Medium (Positive / Negative)	Low (Positive / Negative)	Neutral
<b>Age</b>				X
<b>Disability</b>				X
<b>Ethnicity</b>				X
<b>Gender</b>				X
<b>Gender reassignment</b>				X
<b>Marriage and civil partnerships</b>				X
<b>Pregnancy and maternity</b>				X

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**APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)**

<b>Religion and belief</b>				X
<b>Sexual orientation</b>				X
<b>Socio-economic inequality</b>				X
<b>Is a full EAA required?</b>			No. The service will monitor streets and direct cleansing staff to areas on a needs basis to ensure a clean street environment.	

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

### Y2b: OFFICER DECISIONS

#### Summary

Directorate	Saving Reference	2024/25 Saving (£'000)	Deliverability (%)	2024/25 Net Saving (£'000)	Directorate Total (£'000)
Directorate of Chief Executive	CEX01 – Lewisham Life Magazine	69.00	100%	69.00	
Directorate of Chief Executive	CEX02 – Executive Support Team Post Removals	97.00	90%	87.00	
Directorate of Chief Executive	CEX04 – Electoral Services Annual Canvass	2.00	80%	2.00	
Directorate of Chief Executive	CEX06 – Electoral Services Electoral Phones In-House	41.00	90%	37.00	
Directorate of Chief Executive	CEX07 – Information Security and Governance (GF)	36.00	100%	36.00	
Directorate of Chief Executive	CEX08 – Mayor's Office Salary & Non-Salary	1.00	100%	1.00	
Directorate of Chief Executive	CEX09 – Corporate Policy Team Staffing Reduction	72.00	100%	72.00	
Directorate of Chief Executive	CEX10 – People & Org Development Vacant Posts	169.00	100%	169.00	
<b>Directorate of Chief Executive</b>					<b>473.00</b>
Directorate of Children & Young People	CYP01 – CSC Housing Benefit Claims	80.00	80%	64.00	
Directorate of Children & Young People	CYP02 – CSC Placement Payments Efficiency	180.00	80%	144.00	

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

Directorate of Children & Young People	CYP03 – CSC Building Residential Homes	390.00	80%	312.00	
Directorate of Children & Young People	CYP04 – CSC S17 & Placements	500.00	80%	400.00	
Directorate of Children & Young People	CYP05 – Primary Phase Commissioning Costs Management Action	30.00	100%	30.00	
Directorate of Children & Young People	CYP07 – Lewisham Challenge Management Action	40.00	100%	40.00	
Directorate of Children & Young People	CYP09 – Short Breaks Review	150.00	70%	105.00	
Directorate of Children & Young People	CYP11 – FQC Reduction in Business Support	100.00	70%	70.00	
Directorate of Children & Young People	CYP16 – SEND Travel Assistance	150.00	80%	120.00	
Directorate of Children & Young People	CYP17 – Integrated SEND Service Grant Maximisation	100.00	80%	80.00	
Directorate of Children & Young People	CYP19 – Early Years Block Grant Maximisation	35.00	70%	25.00	
<b>Directorate of Children &amp; Young People</b>				<b>1390.00</b>	
Directorate of Community Services	COM01 – ASC Homecare Efficiencies	400.00	80%	320.00	
Directorate of Community Services	COM02 – ASC Transitions	600.00	80%	480.00	
Directorate of Community Services	COM03 – ASC Care Home Reviews	300.00	65%	195.00	
Directorate of Community Services	COM04 – ASC Staffing Reorganisation	350.00	100%	350.00	
Directorate of Community Services	COM05 – ASC Section 117 Recharge	650.00	80%	520.00	

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

Directorate of Community Services	COM06 – ASC Arranging Care Fees & Charges	150.00	85%	128.00	
Directorate of Community Services	COM07 – ALL GF Subsidy Reduction	100.00	100%	100.00	
Directorate of Community Services	COM08 – Leisure Service Savings	130.00	100%	130.00	
Directorate of Community Services	COM10 – Public Health NCDP	90.00	100%	90.00	
<b>Directorate of Community Services</b>				<b>2313.00</b>	
Directorate of Corporate Resources	COR01 – Assurance Budget Adjustments	35.00	90%	32.00	
Directorate of Corporate Resources	COR02 – Assurance Insurance Contracts	203.00	95%	193.00	
Directorate of Corporate Resources	COR03 – Internal Audit Restructure	15.00	70%	11.00	
Directorate of Corporate Resources	COR04 – Finance Structure Revisions	250.00	100%	250.00	
Directorate of Corporate Resources	COR06 – IT & Digital STS	174.00	100%	174.00	
Directorate of Corporate Resources	COR07 – IT & Digital Applications	45.00	100%	45.00	
<b>Directorate of Corporate Resources</b>				<b>705.00</b>	
Directorate of Housing	HSG02 – Capitalisation of Housing Casework Officer to HRA	50.00	100%	50.00	
Directorate of Housing	HSG03 – TA Reduction Project	200.00	100%	200.00	
Directorate of Housing	HSG04 – Reduction of Property Negotiator Posts	113.00	100%	113.00	

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**APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)**

Directorate of Housing	HSG05 – Cease Contribution to Capital Letters	50.00	100%	50.00	
<b>Directorate of Housing</b>					<b>413.00</b>
Directorate of Place	PLA01 – Council Offices Rationalisation	100.00	60%	60.00	
Directorate of Place	PLA06 – One-Council Employment Support	96.00	80%	77.00	
<b>Directorate of Place</b>					<b>137.00</b>
<b>Officer Decisions</b>					<b>5431.00</b>

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

### Proformas

<b>Directorate</b>	Chief Executive			
<b>Director</b>	Helen Clarke			
<b>Service area</b>	Communications			
<b>Cabinet Portfolio</b>	Culture, Leisure and Communications- Cllr Walsh			
<b>Reference</b>	CEX01 - Lewisham Life Magazine			
<b>Saving title</b>	Lewisham Life			
<b>Description of saving</b> <small>(including any specific elements or phasing to be considered)</small>	Reduce frequency of Lewisham Life magazine from four times a year to two times a year.			
<b>Division budget</b>	<b>Gross £k</b>	1,919	<b>Net £k</b>	
<b>Service area budget</b>	<b>Gross £k</b>	1,219	<b>Net £k</b>	
<b>Saving proposed</b>	<b>2023/24 £k</b>	35	<b>2024/25 £k</b>	69
<b>Risks:</b>				
<b>Cost shunt to other service? Y/N</b>	No			
<b>Likelihood of making cut in full - %</b>	100%			
<b>Impact of making the saving</b>	<p>Lewisham Life is produced inhouse by the Council's Communications team and printed and distributed to 150,000 homes across the borough. A 2022 survey revealed it to be the most read and trusted publication in the borough. It is published four times a year, in line with Local Government Publicity Guidance.</p> <p>Rising costs in printing and labour mean the cost of printing and distribution are steadily increasing year-on-year, while advertising revenue for an infrequent, printed publication has decreased. Over time this trend is likely to continue.</p> <p>Lewisham Life is a source of Council news and information for many residents – particularly those who do not have access to digital channels, or chose not to engage with the Council via social media/digital communications.</p>			

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

	<p>The local news market has reduced drastically over the last decade, with limited resources and no local newspaper delivered across the borough.</p> <p>As such, any reduction will increase the gap in the market for local news and information (including some of our statutory roles such as warning and informing and information about consultations/engagement). This could also lead to services needing to produce service-specific physical comms.</p>			
<b>Possible risk mitigation</b>	<p>A strategic content plan will allow to get the most out of our two issues a year and align with the Council's priorities. We will seek advertising and support from partners to either increase the size of the publication and/or resume quarterly publication.</p> <p>We are currently developing proposals to increase the reach of news and information from the Council and LSP members, both via digital and physical channels.</p>			
<b>Other considerations:</b>				
<b>Member or Officer decision</b>	Officer but members to be briefed.			
<b>Redundancies</b>	<b>Y/N</b>	<b>N</b>	<b>Number of staff</b>	
<b>Public consultation</b>	<b>Y/N</b>	<b>N</b>	<b>Audience(s)</b>	
<b>Investment required</b> (value of saving shown above should be net of this investment)	<b>Y/N</b>	<b>N</b>	<b>Cost £k</b>	
	<b>In what:</b>			
<b>Contingent on other actions / decisions / cross service work</b>	Other services may need to fund alternatives to inform residents about services/changes/consultations etc.			
<b>Specific legal or statutory considerations</b>	N/A			

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**Equalities Screening Template**

<b>Impact &amp; Outcomes</b>
<b>What is the likely impact of the proposed changes?</b>
<b>Service Users</b>
<p>Lewisham Life is produced inhouse by the Council’s Communications team and printed and distributed to 150,000 homes across the borough. A 2022 survey revealed it to be the most read and trusted publication in the borough. It is published four times a year, in line with the Code of Recommended Practice on Local Authority Publicity.</p> <p>Rising costs in printing and labour mean the cost of printing and distribution are steadily increasing year-on-year, while advertising revenue for an infrequent printed publication has decreased. Over time this trend is likely to continue.</p> <p>Lewisham Life is a source of Council news and information for many residents – particularly those who do not have access to digital channels, or chose not to engage with the Council via social media/digital communications.</p> <p>The local news market has reduced drastically over the last decade, with limited resources and no local newspaper delivered across the borough.</p> <p>As such, any reduction will increase the gap in the market for local news and information (including some of our statutory roles such as warning and informing and information about consultations/engagement). This could also lead to services needing to produce service-specific physical comms.</p> <p>We will try to gain sponsorship to enable us to resume quarterly publication in the near future, but in the meantime we will take steps to mitigate the potential impact of the change in service. A strategic content plan will allow to get the most out of our two issues a year and align with the Council’s priorities.</p> <p>We are currently developing proposals to increase the reach of news and information from the Council and LSP members, both via digital and physical channels.</p>

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

It is worth noting that over 95% of Lewisham residents have access to the Internet, so we will also work to increase subscribers to our weekly e-newsletter.

### Staff

No impact – Lewisham Life is produced inhouse by the Council’s Communications Team. Staff capacity created by this change will be reallocated to other communications activity.

### Other Council Services

Other services may need to fund alternative communications to inform residents about services/changes/consultations etc.

### Partners

Partners frequently use Lewisham Life to promote events or campaigns. We will liaise with them to ensure we can find alternative ways to support their work, and engage them in trying to find sponsorship to enable us to increase the frequency of publication back up to four times a year.

**Are there any specific equalities implications?** Please provide a response for each protected characteristic/equalities consideration, even if the impact is neutral.

Protected characteristics and other equalities considerations	High (Positive / Negative)	Medium (Positive / Negative)	Low (Positive / Negative)	Neutral
Age		Research shows that while over 95% of Lewisham residents have internet access, however those who do not tend to be older - this may limit their access to alternative		

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**APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)**

		sources of news and information.		
<b>Disability</b>				X
<b>Ethnicity</b>				X
<b>Gender</b>				X
<b>Gender reassignment</b>				X
<b>Marriage and civil partnerships</b>				X
<b>Pregnancy and maternity</b>				X
<b>Religion and belief</b>				X
<b>Sexual orientation</b>				X
<b>Socio-economic inequality</b>		Research shows that residents in lower social and economic grades (C2DE) and/or social housing are <u>slightly less likely to have access</u> to the internet – this may limit their access to alternative sources of news and information.		
<b>Is a full EAA required?</b>			N	

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

<b>Directorate</b>	Chief Executive			
<b>Director</b>	Helen Clarke			
<b>Service area</b>	Communications and Engagement (Executive Support)			
<b>Cabinet Portfolio</b>	Culture, Leisure and Communications- Cllr Walsh			
<b>Reference</b>	CEX02 - Executive Support Team Post Removals			
<b>Saving title</b>	Executive Support Structure			
<b>Description of saving</b> (including any specific elements or phasing to be considered)	<p>The Executive Support Team will be reduced by two posts, achieved by not filling two vacancies which are currently held within the service.</p> <p>This will be a permanent saving, with the changes made to the base salary budget of the team.</p>			
<b>Division budget</b>	<b>Gross £</b>	1,919	<b>Net £k</b>	
<b>Service area budget</b>	<b>Gross £</b>	700	<b>Net £k</b>	£0
<b>Saving proposed</b>	<b>2023/24 £k</b>	35 (plus potential underspend of further £50k)	<b>2024/25 £k</b>	97
<b>Risks:</b>				
<b>Cost shunt to other service? Y/N</b>	No			
<b>Likelihood of making cut in full - %</b>	90%			
<b>Impact of making the saving</b>	The saving will reduce the level of administrative support which is provided to Directors within the Council, it will also increase the workload of the Executive Support service.			
<b>Possible risk mitigation</b>	<p>A more fluid provision of administrative support, with staff covering across multiple Directorates instead of providing support to one.</p> <p>An acknowledgement of the different levels of administrative support required by different Directors across the Council. This will allow the service</p>			

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

	to reduce support in areas where capacity is not being fully utilised, and increase the provision of support to areas where the service is being reduced, but the demand is still high.		
<b>Other considerations:</b>			
<b>Member or Officer decision</b>	Officer		
<b>Redundancies</b>	<b>Y/N</b>	N	<b>Number of staff</b> -
<b>Public consultation</b>	<b>Y/N</b>	N	<b>Audience(s)</b> -
<b>Investment required</b> (value of saving shown above should be net of this investment)	<b>Y/N</b>	N-	<b>Cost £k</b> -
	<b>In what:</b>		
<b>Contingent on other actions / decisions / cross service work</b>	No		
<b>Specific legal or statutory considerations</b>	None		

### Equalities Screening Template

<b>Impact &amp; Outcomes</b>
<b>What is the likely impact of the proposed changes?</b>
<b>Service Users</b>
<p>This change relates to a reduction of two vacant posts which are currently held within the Council's Executive Support Team.</p> <p>This change will have a minimal impact on service users. The team that is affected does not provide a service that regularly interacts with Lewisham residents, and therefore changes to it likely will not be felt by residents.</p>

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

The team does provide a small casework function, but this is carried out primarily by the team's managers, and the proposed change will impact the capacity of officers. It is therefore felt that there will be no impact on service users from implementation.

### Staff

This change will impact staff within the Executive Support Team, as well as the Council's Directors. The Executive Support team primarily provides an administrative function to the Council's senior officers, and therefore a reduction in its capacity will reduce the work that they are able to complete. It is possible that some of the burden that has previously been carried by this team will now need to be covered from within services, rather than being provided corporately by the Council.

Additionally, Officers within the Executive Support Team will now need to provide administrative support to an increased number of directors relative to their size as a team. This will increase the workload of both officers and managers within the team. Although it is felt that the team do have capacity to absorb an increased workload, this change will be closely monitored to ensure that it does not have a significant negative impact on workload.

### Other Council Services

This change will have a minimal impact on the other Council services. As has been referenced above, it is possible that a reduced corporate administrative function will mean that some services find an increased administrative workload is placed on them. However, it is felt that this will not be significant and more efficient ways of working, including utilising technology designed to support administrative work, will help to minimise this impact.

### Partners

This change will not impact the Council's partners.

**Are there any specific equalities implications?** Please provide a response for each protected characteristic/equalities consideration, even if the impact is neutral.

Protected characteristics and other equalities considerations	High (Positive / Negative)	Medium (Positive / Negative)	Low (Positive / Negative)	Neutral
Age				X
Disability				X

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**APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)**

<b>Ethnicity</b>				X
<b>Gender</b>				X
<b>Gender reassignment</b>				X
<b>Marriage and civil partnerships</b>				X
<b>Pregnancy and maternity</b>				X
<b>Religion and belief</b>				X
<b>Sexual orientation</b>				X
<b>Socio-economic inequality</b>				X
<p>This proposed change focuses only of roles which have been held vacant for an extended period of time. As no significant impact has been felt for the duration that the roles have already been vacant, it is assumed that formalising the change will not have a significant impact on the Council or on service users.</p>				
<b>Is a full EAA required?</b>			N	

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

Directorate	Chief Executive's			
Director	Sherene Russell-Alexander			
Service area	People and Organisation Development			
Cabinet Portfolio	Finance and Strategy - Cllr de Ryk			
Reference	CEX10 – People & Org Development Vacant Posts			
<b>Saving title</b>				
People and Organisation Development Savings Proposal				
<b>Description of saving</b>				
(including any specific elements or phasing to be considered)	All savings proposed are ongoing and achieved by holding vacant positions. <b>General Fund</b> For Financial Year 2023/24 People and OD is projected to be underspent by £200,000 which represents a <b>7% saving on the Net Budget</b> . This is achieved mostly by holding vacancies while making some small savings in other areas.			
<b>Division budget</b>	<b>Gross £k</b>	£2,925 (General Fund)	<b>Net £k</b>	£2,719 (General Fund)
<b>Service area budget</b>	<b>Gross £k</b>	N/A	<b>Net £k</b>	N/A
<b>Saving proposed</b>	<b>2023/24 £k</b>	£200k (General Fund 7%)	<b>2024/25 £k</b>	Target Savings: 6% of General Fund = £169k
<b>Risks:</b>				
<b>Cost shunt to other service? Y/N</b>	No			
<b>Likelihood of making cut in full - %</b>	100%			
<b>Impact of making the saving</b>	Higher workload for the team. Service activities to be prioritised carefully to ensure we have capacity to match delivery. As it stands there is a continually demand, with little regard for actual ability to deliver.			
<b>Possible risk mitigation</b>	Careful consideration of what is added (negotiated to be removed) to the workplan - clear mapping of capacity and resources			
<b>Other considerations:</b>				

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

<b>Member or Officer decision</b>	Officer			
<b>Redundancies</b>	<b>Y/N</b>	<b>Y</b>	<b>Number of staff</b>	<b>Potential 2 (2024/25)</b>
<b>Public consultation</b>	<b>Y/N</b>	<b>N</b>	<b>Audience(s)</b>	
<b>Investment required</b> (value of saving shown above should be net of this investment)	<b>Y/N</b>	<b>N</b>	<b>Cost £k</b>	
	<b>In what:</b>			
<b>Contingent on other actions / decisions / cross service work</b>	No			
<b>Specific legal or statutory considerations</b>	Compliance with employment legislation for redundancy and consultation with trade unions.			

## Equalities Screening Template

For each of the nine protected characteristics, identify whether the proposal has a high, medium, low or neutral impact on service users and whether this is a positive or negative impact.

Identify whether the proposal has a high, medium, low or neutral impact on socio-economic inequality (e.g. low income, fuel poverty, food insecurity, digital inclusion etc) and whether this is a positive or negative impact.

Identify whether a full service equalities analysis assessment is required for this proposal based on this Equalities Analysis Toolkit. For advice on whether an EAA is required and how to assess service equalities impact please contact [policy@lewisham.gov.uk](mailto:policy@lewisham.gov.uk)

### Impact & Outcomes

#### Is this report easy to understand?

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

What is the likely impact of the proposed changes?				
<b>Service Users</b>				
No impact on service users for both 2023/24 and 2024/25				
<b>Staff</b>				
No impact on staff for 2023/24 as savings achieved by holding vacancies open.				
For 2024/25 a small restructure within People and OD is envisaged to achieve savings target. However, the details are yet to be determined. Once we are clear on the exact nature of the changes and the impact on individual posts and people, a full EAA for that people change will be undertaken.				
<b>Other Council Services</b>				
No impact envisaged for both 2023/24 and 2024/25				
<b>Partners</b>				
No impact envisaged for both 2023/24 and 2024/25				
Are there any specific equalities implications? Please provide a response for each protected characteristic/equalities consideration, even if the impact is neutral.				
Protected characteristics and other equalities considerations	High (Positive / Negative)	Medium (Positive / Negative)	Low (Positive / Negative)	Neutral
Age				X
Disability				X
Ethnicity				X
Gender				X
Gender reassignment				X
Marriage and civil partnerships				X

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

<b>Pregnancy and maternity</b>				<b>X</b>
<b>Religion and belief</b>				<b>X</b>
<b>Sexual orientation</b>				<b>X</b>
<b>Socio-economic inequality</b>				<b>X</b>
<b>Is a full EAA required?</b>	No. Not required at this stage as referenced above. Once the details of the changes are known, we will undertake a further screening exercise			

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

<b>Directorate</b>	Chief Executive's		
<b>Director</b>	Jeremy Chambers		
<b>Service area</b>	Electoral Services		
<b>Cabinet Portfolio</b>	Finance and Strategy - Cllr de Ryk		
<b>Reference</b>	CEX04 – Electoral Services Annual Canvass		
<b>Saving title</b>	Annual Canvass – remove non-statutory freepost reply envelope and scanning service		
<b>Description of saving</b> (including any specific elements or phasing to be considered)	<p>From 2024-25 onwards</p> <p>The law requires us to send a canvass form with pre-paid response envelope to every 'route 2' property at least once. We have to send reminder forms to non-responding properties, but the requirement for a pre-paid reply envelope no longer applies. The first part of this proposal is to remove the pre-paid reply envelope from the reminder forms.</p> <p>Saving of £1k</p> <p>The second part of the proposal involves the scanning of the returned forms. Currently the forms are returned to a contractor who opens, scans and destroys the forms for us. This costs around £1k (including VAT). We propose scanning the forms ourselves instead. This work will be absorbed in normal officer work time.</p> <p>Saving of £1k</p>		
<b>Division budget</b>	<b>Gross £k</b>		<b>Net £k</b>
<b>Service area budget</b>	<b>Gross £</b>	468	<b>Net £k</b> 466
<b>Saving proposed</b>	<b>2023/24 £k</b>	<b>0</b>	<b>2024/25 £k</b> <b>2</b>
<b>Risks:</b>			
<b>Cost shunt to other service? Y/N</b>	N		
<b>Likelihood of making cut in full - %</b>	80%		
<b>Impact of making the saving</b>	<p>The initial form must still carry a reply envelope. Most of the postal responses we receive come from that first form, so for most residents there will be no change to the service.</p> <p>There is an impact on the residents that receive the reminder forms. 90% of responses come from our online response service, which is cheaper than the postage cost, so this will likely mean more people using that method.</p> <p>There may be an impact on those who are unable to use the internet, and who do not receive, or lose/ignore the initial form with the reply envelope.</p>		

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

<b>Possible risk mitigation</b>	Those residents who are affected and unable to respond to the forms posted to them will receive a visit from a canvasser. This is a legal requirement and work we already carry out. So there is adequate mitigation already built in to the service, and already accounted for in our budget.			
<b>Other considerations:</b>				
<b>Member or Officer decision</b>	Officer			
<b>Redundancies</b>	Y/N	N	<b>Number of staff</b>	NA
<b>Public consultation</b>	Y/N	N	<b>Audience(s)</b>	NA
<b>Investment required</b> (value of saving shown above should be net of this investment)	Y/N	N	<b>Cost £k</b>	NA
	<b>In what:</b>			
<b>Contingent on other actions / decisions / cross service work</b>				
<b>Specific legal or statutory considerations</b>	Statutory requirement for the resident to receive at least 1 canvass form with a reply envelope.			

# Equalities Analysis Assessment

## Electoral Services Savings Proposals

### 2. Annual Canvass – remove non-statutory freepost reply envelope and scanning service

#### Summary of the proposal

From 2024-25 onwards

The law requires us to send a canvass form with pre-paid response envelope to every 'route 2' property at least once. We have to send reminder forms to non-responding properties, but the requirement for a pre-paid reply envelope no longer applies. The first part of this proposal is to remove the pre-paid reply envelope from the reminder forms.

Saving of £1k

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

The second part of the proposal involves the scanning of the returned forms. Currently the forms are returned to a contractor who opens, scans and destroys the forms for us. This costs around £1k (including VAT). We propose scanning the forms ourselves instead. This work will be absorbed in normal officer work time.

Saving of £1k

<b>Impact &amp; Outcomes</b>
<b>What is the likely impact of the proposed changes?</b>
<b>Service Users</b>
<p>The absence of a reply envelope for reminder forms could have a negative impact on a small number of people who prefer to respond by post, rather than the other methods (phone, online, by hand).</p> <p>Note that all properties will still receive a reply envelope with the initial canvass form delivered to them. In the last 2 years, 60% of forms received by post have been returned using the reply envelope in the initial form. However, of the 25,000 responses we receive each year, only 3,000 (12%) are returned by post. The vast majority are completed online.</p> <p>The online response service has improved and the number of online responses has increased every year. Lewisham now receives a higher percentage of online responses than any other London authority, and we believe we can raise that even higher by increasing awareness of the speed and ease of the digital route.</p> <p>The change to the scanning of the forms will have zero impact on service users.</p>
<b>Staff</b>
<p>The removal of the envelope will have a minimal impact on staff. It's possible it may lead to a small increase in enquiries from residents who are not able to use the online or telephone response methods.</p> <p>The change to the scanning will have a bigger impact. Staff will have to increase the amount of time they spend scanning the forms.</p> <p>However, we know that scanning the forms internally will improve the speed and quality of our service. We will be able to scan the forms each morning, rather than waiting for the contractor to scan and upload them each afternoon. This will help the staff with the planning of their day, and give us a greater ability to audit the effectiveness of our scanning (by checking batches to identify any missed items).</p>
<b>Other Council Services</b>
<p>The postroom will see a large increase in the number of items to process during the canvass period. However, it is not considered this will be beyond their capacity, as the number of items will not be as great as they were in 2019, and the staffing has remained the same.</p>

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

Partners				
Our print supplier will not need to print so many reply envelopes, nor insert envelopes for our additional runs. This will save time.				
The reduction in envelope printing will help with our environmental policy.				
Are there any specific equalities implications? Please provide a response for each protected characteristic/equalities consideration, even if the impact is neutral.				
Protected characteristics and other equalities considerations	High (Positive / Negative)	Medium (Positive / Negative)	Low (Positive / Negative)	Neutral
Age			X	
Disability			X	
Ethnicity			X	X
Gender				X
Gender reassignment				X
Marriage and civil partnerships				X
Pregnancy and maternity				X
Religion and belief				X
Sexual orientation				X
Socio-economic inequality			X	
Is a full EAA required?			Yes (with Corporate Policy input)	

## 1. Equalities Analysis Assessment Template

Author	Jamie Baker	Directorate	Chief Execs
Date	11/1/24	Service	Electoral Services

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

### 1. The activity or decision that this assessment is being undertaken for

*Annual Canvass – remove non-statutory freepost reply envelope and scanning service*

From 2024-25 onwards

The law requires us to send a canvass form with pre-paid response envelope to every 'route 2' property at least once. We have to send reminder forms to non-responding properties, but the requirement for a pre-paid reply envelope no longer applies. The first part of this proposal is to remove the pre-paid reply envelope from the reminder forms.

Saving of £1k

The second part of the proposal involves the scanning of the returned forms. Currently the forms are returned to a contractor who opens, scans and destroys the forms for us. This costs around £1k (including VAT). We propose scanning the forms ourselves instead. This work will be absorbed in normal officer work time.

Saving of £1k

### 2. The protected characteristics or other equalities factors potentially impacted by this decision

<input checked="" type="checkbox"/> Age	<input type="checkbox"/> Ethnicity/ Race	<input type="checkbox"/> Religion or belief	<input checked="" type="checkbox"/> Language spoken	<input type="checkbox"/> Other, please define:
<input type="checkbox"/> Gender/Sex	<input type="checkbox"/> Gender identity	<input checked="" type="checkbox"/> Disability	<input checked="" type="checkbox"/> Household type	
<input type="checkbox"/> Income	<input type="checkbox"/> Carer status	<input type="checkbox"/> Sexual orientation	<input checked="" type="checkbox"/> Socio Economic status	
<input type="checkbox"/> Marriage and Civil Partnership	<input type="checkbox"/> Pregnancy and Maternity	<input type="checkbox"/> Refugee/ Migrant/ Asylum seeker	<input type="checkbox"/> Health & Social Care	
<input type="checkbox"/> Nationality	<input type="checkbox"/> Employment	<input type="checkbox"/> Armed forces		

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### **3. The evidence to support the analysis**

Annual canvass response statistics for the last 3 years

The statistics from previous canvasses show us the number of responses to the canvass from the initial form and reminder forms.

ONS data

This gives us information on the number and types of people living in Lewisham. We cannot match the 2 datasets to determine exactly which categories of people are more likely to use reply envelopes, but we can make reasonable assumptions on the likelihood of some people having a preference for responding by post.

### **4. The analysis**

The canvass response rate has increased every year. The number of responses by post, using the free reply envelope, has decreased every year, with the number of online responses increasing significantly.

The total response rate for canvass route 2 properties is 65%. 40% of properties respond to the initial canvass form. We send a further 2 reminders and send canvassers who make at least 2 visits to each non-responding household. The total response rate from the 2 reminder forms and the door-knocking accounts for the remaining 15% of the properties to respond.

This evidence tells us:

- The introduction of the online response service has improved the response rate, reduced cost, and improved accessibility
- The reply envelope results in a decent number of responses with the initial canvass form, but suffers from diminishing returns in the subsequent reminder forms
- There are many reasons why residents do not respond to the canvass, the presence of a reply form has not made an impact on reducing the number of non-responders
- Although we cannot match non-responding properties against ONS data, we can make reasonable assumptions on the categories of people less likely to respond to the canvass
- We can also make some reasonable assumptions on the categories of people who are more likely to prefer to respond by post, using a freepost reply envelope

Scanning

For the scanning element of the proposal, the evidence shows that there will be approximately 4,000 canvass forms to scan each year. This represents a total of around 15

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hours work. This is spread across a 4 month period, and can be spread across 4 members of staff. Therefore, we consider the impact on staff to be minimal, with the extra work easily absorbed into current working schedules.

## **5. Impact summary**

### **Age**

Potential for positive and negative impacts

Older people

Older people have traditionally been less likely to use digital solutions for public services, such as responding to the annual canvass. The absence of a freepost reply envelope may impact this group negatively due to their preference to complete and return the physical form.

However, recent studies show that the 70+ age group are now far more digitally proficient and confident, and in some spending more time online than other age groups. We also know that this group are more likely to respond to the initial canvass form which will carry a reply envelope.

Finally, we also know that older people move home less often, so are more likely to fall under route 1 of the canvass and be automatically verified, with no requirement to respond.

Younger people

Younger people are less likely to register to vote, and less likely to respond to the annual canvass form. The presence of a reply envelope is not thought to be a significant factor in their ability or propensity to complete the form or register to vote. Instead, it is the language on the form and awareness of the requirement to register that represent bigger barriers, in addition to an increased likelihood to feel disengaged from politics and therefore disinclined to be involved.

### **Language Spoken**

Potential for negative impacts

People who have low levels of English, or cannot read English will struggle to complete and return the canvass form. The form itself is easier to understand and complete for someone in this category compared to the online form. The presence of existing names with nationality and layout of the form make it more obvious what the resident needs to do. Because of this, the reply form is more useful for this group as they are more likely to want to respond by post.

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## **Disability**

Both positive and negative impacts

This group is quite varied and the ability to respond with a freepost envelope will affect disabled people differently.

Many disabled people with mobility impairments will prefer to respond online as there is no requirement for them to travel to a postbox.

Some disabled people will struggle to complete the form themselves – paper or online versions – and will require someone to help them, such as a carer. Carers will usually prefer to complete the paper form and return it via post, rather than the online system which would require them to log on to the website with their personal device at their clients home.

## **Household type**

Negative impact

People living in flat shares and HMOs are less likely to want to complete the canvass form for the entire property. That is because they often don't know their housemates well, and are not willing to take responsibility for the household. In these cases the paper form is often the best way for them to respond – each member of the household adding their own details, with the final person returning the form. However, the response rate from these properties has been low for a number of years, and we are trying other methods to contact these households to gather the list of residents.

## **Socio-Economic status**

Potential for negative impact

The poorest residents in Lewisham may not have access to online services at home, and therefore are more likely to require the freepost reply envelope.

## **Impact on Council's 5 equality objectives:**

- **To ensure equal opportunities for marginalised and seldom heard communities.**

Minor impact. The absence of a reply envelope from reminder forms will slightly reduce the likelihood of some residents to complete and return the form

- **To reduce the number of vulnerable people in the borough by tackling socio-economic inequality.**

No impact.

- **To improve the quality of life of residents by tackling preventable illnesses and diseases.**

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No impact.

- **To ensure that services are designed and delivered to meet the needs of Lewisham's diverse population.**

Positive impact. The absence of the reply envelope with the reminder forms will encourage more people to return their form online. More online responses will improve the efficiency of the service and reduce the cost for residents

- **To increase the number of people we support to become active citizens**

Positive impact

Completing their registration online will give them access to more information that can encourage electoral participation.

## **6. Mitigation**

Our mitigations already exist and can be built upon further.

- The initial canvass form will still have a freepost reply envelope
- Residents are able to call us directly and complete the form over the phone
- Forms can also be returned by an additional recorded message phoneline, online, via email, and via text message
- Forms are sent to 75% of registered voters via email, with a significant response each year
- 40 canvassers visit all non-responding households to help them complete the form
- HMOs and student properties are dealt with separately, with data being requested, and often supplied, by a responsible person (HOM licence holder, landlord, university and wardens). This removes the requirement for some households to respond
- Improved data matching processes to identify where people are still resident (found on other council databases) removing their requirement to return the form
- Translation services information appearing on the forms enabling people who do not understand English to contact us and get help to complete the form
- Anybody that asks for a reply envelope, or a canvass form, will receive one in the post (forms we post out directly will always contain a reply envelope)

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**7. Service user journey that this decision or project impacts**

*Service users will be able to contact the council to complain or get more information about the canvass. The best point of contact will be electoral services – phone, email or visiting our office.*

*The main impact of this policy is to further encourage responses using the online response service, saving the council money which can be better spent on other important council services.*

**Signature of Director**

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

<b>Directorate</b>	Chief Executive's			
<b>Director</b>	Jeremy Chambers			
<b>Service area</b>	Electoral Services			
<b>Cabinet Portfolio</b>	Finance and Strategy - Cllr de Ryk			
<b>Reference</b>	CEX06 – Electoral Services Electoral Phones In-House			
<b>Saving title</b>	Bringing answering of electoral phone line back in-house			
<b>Description of saving</b> (including any specific elements or phasing to be considered)	<p>One-off and Ongoing</p> <p>Lewisham's Corporate Customer Relations team (CCR) took over the handling of calls to electoral services back in 2018. In return the service receives a journal of the cost of a scale 5 officer with on-costs, from the electoral registration budget. In 2023-24 the total cost is projected to be £40,796.</p> <p>However, we believe this is no longer value for money, and the phone line should revert to the electoral services team, which should be possible without creating any extra cost, and without reducing the level of service received by residents.</p> <p>The contract with the CCR is a rolling annual contract, but can be cancelled with 28 days notice.</p> <p>This proposal is for cancelling the contract on 31/12/23, which would bring about savings of:</p> <p>£10,199.01 for the 23-24 financial year (one-off saving)</p> <p>£40,796.04 for the 24-25 financial year (ongoing saving)</p>			
<b>Division budget</b>	<b>Gross £k</b>		<b>Net £k</b>	
<b>Service area budget</b>	<b>Gross £</b>	468411	<b>Net £k</b>	468411
<b>Saving proposed</b>	<b>2023/24 £k</b>	<b>10</b>	<b>2024/25 £k</b>	<b>41</b>
<b>Risks:</b>				
<b>Cost shunt to other service? Y/N</b>		Not really. But it would create a dent in the budget for the CCR, but with a corresponding reduction in workload.		
<b>Likelihood of making cut in full - %</b>		90%		
<b>Impact of making the saving</b>	<ul style="list-style-type: none"> <li>Electoral services already take <u>all</u> electoral calls during an election period</li> <li>The CCR only take calls during months where there is no election</li> </ul>			

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

	<ul style="list-style-type: none"> <li>The impact will be on residents making electoral registration enquiries</li> <li>For the vast majority of the time, the call volume will be easily manageable for the electoral services team of 4 officers</li> <li>The impact on those 4 officers may mean less time to spend on other tasks</li> <li>At certain times the residents may find it harder to reach us on the phone</li> <li>But the speed, accuracy and quality of the response will be improved due to the expertise of the electoral officers compared to the CCR who are not electoral specialists</li> <li>It is likely that enquiries will be 'pushed' to online routes, which may not be accessible for all, though the phone lines will not be cut and will still be available for those who need them</li> </ul> <ul style="list-style-type: none"> <li>Potential for a negative impact on the CCR service, who will have a reduced income of £10k in 23-24 and £41k in 24-25 and thereafter</li> </ul> <ul style="list-style-type: none"> <li>This may mean the service needs to reduce their workforce, but could also allow for developments in other areas of the service due to freeing up officer time</li> </ul>			
<b>Possible risk mitigation</b>	<ul style="list-style-type: none"> <li>'Push' residents to online routes for resolving their queries</li> <li>Remove the phone number from the largest mailouts, retaining it on forms only when there is a more likely requirement for the resident to contact us (eg. No phone number on addition or removal notices, but definitely keep the phone number on poll cards)</li> <li>Encourage email and postal responses</li> <li>Add forms to the website for the most common queries to enable self-service and a quick and convenient way for residents to reach us</li> <li>In the past, the electoral team is expanded at election time to manage our calls. We can begin this earlier if the call volumes necessitates and if the demands on officer time becomes too great</li> </ul>			
<b>Other considerations:</b>				
<b>Member or Officer decision</b>	Officer			
<b>Redundancies</b>	Y/N	N	<b>Number of staff</b>	NA
<b>Public consultation</b>	Y/N	N	<b>Audience(s)</b>	NA
<b>Investment required</b> (value of saving shown above should be net of this investment)	Y/N	N	<b>Cost £k</b>	NA
	<b>In what:</b>			
<b>Contingent on other actions / decisions / cross service work</b>				

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<b>Specific legal or statutory considerations</b>	A phone number is a requirement for many of the prescribed electoral registration and election forms. We do not propose removing the phone number from any of these forms. We will review the legislation and submit a proposal to EMT, with an EIA, before removing the phone number from any communications, or introducing any other 'push' methods.
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# Equalities Analysis Assessment

## Electoral Services Savings Proposals

### 4. Bringing answering of electoral phone line back in-house

#### Summary of the proposal

One-off and Ongoing

Lewisham's Corporate Customer Relations team (CCR) took over the handling of calls to electoral services back in 2018. In return the service receives a journal of the cost of a scale 5 officer with on-costs, from the electoral registration budget. In 2023-24 the total cost is projected to be £40,796.

However, we believe this is no longer value for money, and the phone line should revert to the electoral services team, which should be possible without creating any extra cost, and without reducing the level of service received by residents.

The contract with the CCR is a rolling annual contract, but can be cancelled with 28 days notice.

This proposal is for cancelling the contract on 31/12/23, which would bring about savings of:

£10,199.01 for the 23-24 financial year (one-off saving)

£40,796.04 for the 24-25 financial year (ongoing saving)

#### Impact & Outcomes

##### What is the likely impact of the proposed changes?

##### Service Users

When contacting electoral services by phone, residents will now speak directly to the electoral services staff, rather than staff in the Customer Services Centre. There are 2 impacts, 1 positive and 1 negative:

- Positive – service users will speak directly to expert electoral officers and will receive an excellent and improved response

#### Is this report easy to understand?

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

<ul style="list-style-type: none"> <li>Negative – on very rare occasions it is possible that service users will have to wait longer for their call to be answered</li> </ul>				
<b>Staff</b>				
Electoral Services staff will now have to answer telephone calls more often. This can disrupt the flow of their work, and can lead to an increase in work. On the other hand, speaking directly to residents on a regular basis will improve the team's knowledge of our service users, and our ability to respond to their needs.				
<b>Other Council Services</b>				
No impact				
<b>Partners</b>				
No impact				
<b>Are there any specific equalities implications? Please provide a response for each protected characteristic/equalities consideration, even if the impact is neutral.</b>				
Protected characteristics and other equalities considerations	High (Positive / Negative)	Medium (Positive / Negative)	Low (Positive / Negative)	Neutral
Age				X
Disability				X
Ethnicity				X
Gender				X
Gender reassignment				X
Marriage and civil partnerships				X
Pregnancy and maternity				X
Religion and belief				X
Sexual orientation				X
Socio-economic inequality				X
<b>Is a full EAA required?</b>			No (with Corporate Policy input)	

### Is this report easy to understand?

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# 1. Equalities Analysis Assessment Template

<b>Author</b>	<b>Jamie Baker</b>	<b>Directorate</b>	<b>Chief Execs</b>	
<b>Date</b>	<b>11/1/24</b>	<b>Service</b>	<b>Electoral Services</b>	
<p>One-off and Ongoing</p> <p>Lewisham’s Corporate Customer Relations team (CCR) took over the handling of calls to electoral services back in 2018. In return the service receives a journal of the cost of a scale 5 officer with on-costs, from the electoral registration budget. In 2023-24 the total cost is projected to be £40,796.</p> <p>However, we believe this is no longer value for money, and the phone line should revert to the electoral services team, which should be possible without creating any extra cost, and without reducing the level of service received by residents.</p> <p>The contract with the CCR is a rolling annual contract, but can be cancelled with 28 days notice.</p> <p>This proposal is for cancelling the contract on 31/12/23, which would bring about savings of:</p> <p>£10,199.01 for the 23-24 financial year (one-off saving)</p> <p>£40,796.04 for the 24-25 financial year (ongoing saving)</p>				
<p><b>1. The protected characteristics or other equalities factors potentially impacted by this decision</b></p>				
<input type="checkbox"/> Age	<input type="checkbox"/> Ethnicity/ Race	<input type="checkbox"/> Religion or belief	<input type="checkbox"/> Language spoken	<input type="checkbox"/> Other, please define:
<input type="checkbox"/> Gender/Sex	<input type="checkbox"/> Gender identity	<input type="checkbox"/> Disability	<input type="checkbox"/> Household type	
<input type="checkbox"/> Income	<input type="checkbox"/> Carer status	<input type="checkbox"/> Sexual orientation	<input type="checkbox"/> Socio Economic status	
<input type="checkbox"/> Marriage and Civil Partnership	<input type="checkbox"/> Pregnancy and Maternity	<input type="checkbox"/> Refugee/ Migrant/ Asylum seeker	<input type="checkbox"/> Health & Social Care	

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

<input type="checkbox"/> Nationality	<input type="checkbox"/> Employment	<input type="checkbox"/> Armed forces	
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### 2. The evidence to support the analysis

We have data to show the number of calls received by the CSC for electoral services over the past 5 years. The data shows that the electoral services team should be able to handle the number of calls with a similar or higher response rate (i.e. with fewer calls going unanswered).

The CSC call handlers have in the past been trained by the electoral services team. The electoral services team have more knowledge, experience and qualifications concerning our service area, and will naturally be more able to respond to enquiries. With the addition of some customer response training, the electoral services team should be well prepared to answer calls from all kinds of residents.

Note that the electoral services telephone lines are transferred back to the electoral services team during election periods, which is when the highest volume of calls are received. The CSC does not answer electoral calls during this period. The reason for this was to improve the speed and quality of response to residents contacting the service at the most important period (election time!).

### 3. Impact summary

This change is not considered to cause a negative impact on any category of resident or service user. The movement of the phone lines back to the electoral services team will ensure that resident phone calls are answered by the staff with the most expertise, knowledge and electoral register access. Enquiries will be answered correctly and promptly, with appropriate follow-up questions asked to provide further benefit.

There is the potential for an impact on the electoral services staff, which will reduce over time as the staff develop procedures and undertake training to be better able to continue their regular work with the occasional interruption of a phone call.

#### Impact on Council's 5 equality objectives:

- **To ensure equal opportunities for marginalised and seldom heard communities.**

No impact.

- **To reduce the number of vulnerable people in the borough by tackling socio-economic inequality.**

No impact.

- **To improve the quality of life of residents by tackling preventable illnesses and diseases.**

No impact.

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<ul style="list-style-type: none"> <li>• <b>To ensure that services are designed and delivered to meet the needs of Lewisham’s diverse population.</b></li> </ul> <p>Positive impact. The improved knowledge and electoral register access for people answering the phones will improve the quality of the service the residents receive.</p>	<ul style="list-style-type: none"> <li>• <b>To increase the number of people we support to become active citizens</b></li> </ul> <p>No impact.</p>
<p style="text-align: center;"><b>4. Mitigation</b></p> <p>Electoral Services staff will receive the following training:</p> <ul style="list-style-type: none"> <li>• Call handling</li> <li>• Difficult conversations</li> <li>• Complaints</li> <li>• Equality and diversity</li> <li>• The operating system – especially in transferring calls to other services, and how to operate the language line service</li> <li>• Prioritising work and juggling tasks</li> </ul> <p>More staff will be added to the service at peak times, namely for elections and the canvass. And we can operate a rota system to improve our response times and ability to undertake other tasks (such as meeting residents in person who report to reception).</p>	
<p style="text-align: center;"><b>5. Service user journey that this decision or project impacts</b></p> <p><i>The service user journey will improve as they will speak directly with the electoral services staff rather than a customer engagement officer. The impact on electoral services itself could be challenging at times but we have sufficient mitigations and opportunities to lead to an improvement in the service.</i></p>	
<p><b>Signature of Director</b></p>	

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

<b>Directorate</b>	Chief Executive			
<b>Director</b>	Jeremy Chambers			
<b>Service area</b>	Information Security and Governance			
<b>Cabinet Portfolio</b>	Finance and Strategy - Cllr de Ryk			
<b>Reference</b>	CEX07 – Information Security and Governance (GF)			
<b>Saving title</b>	Information Security and Governance GF Savings			
<b>Description of saving</b> (including any specific elements or phasing to be considered)	<p>NB: For all savings please confirm whether one-off or ongoing? All 2024/25 savings should be ongoing, and any 2023/24 once off savings must have a permanent replacement in 2024/25.</p> <p>2023 / 2024</p> <p>GF Savings:</p> <p>None</p> <p>2024/2025</p> <p>GF Savings:</p> <p>Savings of £36000 by reducing the supplies and services budget by £30000 and the Comms and Computing budget by £6000. This will be ongoing.</p> <p>NB: These GF savings are made against the current service budget and do not take into account the budget for the Access to Records team which is transferring from CYP.</p>			
<b>Division budget</b>	<b>Gross £k</b>		<b>Net £k</b>	
<b>Service area budget</b>	<b>Gross £k</b>	744	<b>Net £k</b>	594
<b>Saving proposed</b>	<b>2023/24 £k</b>	0	<b>2024/25 £k</b>	36
<b>Risks:</b>				
<b>Cost shunt to other service? Y/N</b>		If 'yes' identify the service impacted.		
<b>Likelihood of making cut in full - %</b>		100%		

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

<b>Impact of making the saving</b>	GF: Savings have come from non-salary budget and should not see impact to service delivery.			
<b>Possible risk mitigation</b>	The DPO function transferring from Lewisham Homes will transfer to the Council's DPO.  Non-salary savings were made based on comparative spend of previous years.			
<b>Other considerations:</b>				
<b>Member or Officer decision</b>	Officer decision			
<b>Redundancies</b>	<b>Y/N</b>	N	<b>Number of staff</b>	0
<b>Public consultation</b>	<b>Y/N</b>	N	<b>Audience(s)</b>	N/A
<b>Investment required</b> (value of saving shown above should be net of this investment)	<b>Y/N</b>	N	<b>Cost £k</b>	-
	<b>In what:</b>	N/A		
<b>Contingent on other actions / decisions / cross service work</b>	N/A			
<b>Specific legal or statutory considerations</b>	The DPO function of Lewisham Homes transferring to the Council will be absorbed by the Council's DPO.			

<b>Impact &amp; Outcomes</b>
<b>What is the likely impact of the proposed changes?</b>
<b>Service Users</b>
Include evidence to support anticipated impacts, both positive and negative.  There will be no impact to service users.
<b>Staff</b>
Include evidence to support anticipated impacts, both positive and negative.

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

There will be no impact to staff.				
<b>Other Council Services</b>				
Include evidence to support anticipated impacts, both positive and negative. There will be no impact to Council services.				
<b>Partners</b>				
Include evidence to support anticipated impacts, both positive and negative. There will be no impact to partners.				
<b>Are there any specific equalities implications? Please provide a response for each protected characteristic/equalities consideration, even if the impact is neutral.</b>				
Protected characteristics and other equalities considerations	High (Positive / Negative)	Medium (Positive / Negative)	Low (Positive / Negative)	Neutral
Age				X
Disability				X
Ethnicity				X
Gender				X
Gender reassignment				X
Marriage and civil partnerships				X
Pregnancy and maternity				X
Religion and belief				X
Sexual orientation				X
Socio-economic inequality				X
<b>Is a full EAA required?</b>			N	

<b>Directorate</b>	Chief Executive
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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

<b>Director</b>	Jeremy Chambers			
<b>Service area</b>	Mayor's Office			
<b>Cabinet Portfolio</b>	Mayor			
<b>Reference</b>	CEX08 – Mayor's Office Salary & Non-Salary			
<b>Saving title</b>	Mayor's Office			
<b>Description of saving</b> (including any specific elements or phasing to be considered)	The office will achieve underspend of c.£12k from salaries in 23/24 and is proposing cut of 6% in its 24/25 non-salary expenditure for 24/25 (£870).			
<b>Division budget</b>	<b>Gross £k</b>		<b>Net £k</b>	
<b>Service area budget</b>	<b>Gross £k</b>		<b>Net £k</b>	
<b>Saving proposed</b>	<b>2023/24 £k</b>	<b>12</b>	<b>2024/25 £k</b>	<b>1</b>
<b>Risks:</b>				
<b>Cost shunt to other service? Y/N</b>	No			
<b>Likelihood of making cut in full - %</b>	100%			
<b>Impact of making the saving</b>	Minor impact on office expenditure but this can be managed			
<b>Possible risk mitigation</b>	Look to hold any vacancies as unfilled for short periods of time (where capacity allows) in order to create additional headroom in the budget.			
<b>Other considerations:</b>				
<b>Member or Officer decision</b>	Officer			
<b>Redundancies</b>	<b>Y/N</b>	N	<b>Number of staff</b>	NA
<b>Public consultation</b>	<b>Y/N</b>	N	<b>Audience(s)</b>	NA
<b>Investment required</b> (value of saving shown above should be net of this investment)	<b>Y/N</b>	N	<b>Cost £k</b>	NA
	<b>In what:</b>	NA		

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

Contingent on other actions / decisions / cross service work	NA
Specific legal or statutory considerations	NA

Impact & Outcomes				
What is the likely impact of the proposed changes?				
<b>Service Users</b>				
None.				
<b>Staff</b>				
None.				
<b>Other Council Services</b>				
None.				
<b>Partners</b>				
None.				
Are there any specific equalities implications? Please provide a response for each protected characteristic/equalities consideration, even if the impact is neutral.				
Protected characteristics and other equalities considerations	High (Positive / Negative)	Medium (Positive / Negative)	Low (Positive / Negative)	Neutral
Age				No impact.
Disability				No impact.
Ethnicity				No impact.
Gender				No impact.

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<b>Gender reassignment</b>				No impact.
<b>Marriage and civil partnerships</b>				No impact.
<b>Pregnancy and maternity</b>				No impact.
<b>Religion and belief</b>				No impact.
<b>Sexual orientation</b>				No impact.
<b>Socio-economic inequality</b>				No impact.
<b>Is a full EAA required?</b>			No.	

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

<b>Directorate</b>	Chief Executive's (Legal and Corporate Governance)
<b>Director</b>	Jeremy Chambers
<b>Service area</b>	Scrutiny and Policy
<b>Cabinet Portfolio</b>	Finance and Strategy - Cllr de Ryk
<b>Reference</b>	CEX09 – Corporate Policy Team Staffing Reduction
<b>Saving title</b>	Staffing reduction – Corporate Policy
<b>Description of saving</b> (including any specific elements or phasing to be considered)	<p><b>Deletion of one Senior Policy and Strategy Officer (SPSO) P06 role from 2023/24 onwards.</b></p> <p>This will require the reshaping of the policy team (part of the wider scrutiny and policy team), with a move away from direct support to directorates and a re-focusing on core, central workstreams. The policy team is currently configured to 'shadow' directorates. The proposed reduction in the number of posts in the team combined with an additional directorate (Housing) being created means this is no longer feasible. Instead, it is proposed that the two remaining P06 posts focus on a core suite of corporate policy functions.</p> <p>Currently, equalities work and consultation &amp; engagement work forms a large part of the team's workload, which will need to change.</p> <p><b>Equalities</b> – the saving proposal relies upon equalities work being carried out by a new equalities advisor. This has been agreed and is in train.</p> <p><b>Consultation and engagement</b> – some citizen space work will need to be moved to another team. Completely transferring responsibility for day-to-day consultation and engagement activity to another team would assist in the streamlining and reshaping of the team to take on a central co-ordinating role. Such a transfer may also result in responsibility for the function and responsibility for everyday activity sitting in the same team, which would be desirable.</p> <p>Key elements of a re-shaped policy team:</p> <ul style="list-style-type: none"> <li>The SPSOs will no longer be assigned to specific directorates. Directorates will continue to get dedicated policy support from assigned Executive Support Officers (ESOs). A recent policy mapping exercise showed that, in addition to this, some directorate level policy resource also exists. Specialist support in relation to equalities will be provided by the proposed equalities advisor post.</li> </ul>

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

	<ul style="list-style-type: none"> <li>If required, the two SPSOs will continue to support consultation and engagement, although this will impact on their ability to deliver the key products listed below.</li> <li>The two SPSOs will deliver a range of “key products” for the council including: <ul style="list-style-type: none"> <li><b>Overall policy co-ordination</b> – Regularly meeting with, and linking up, directorate policy leads, the ESOs, performance officers, the specialist equalities post, consultation and engagement officers (if responsibility is transferred) to ensure policy alignment and consistency across the council.</li> <li><b>Corporate Strategy</b> – Assisting in the production of service level delivery plans in relation to key service plan outcomes and KPIs; and tracking delivery of the corporate strategy, in partnership with the Performance team, with an annual report to EMT.</li> <li><b>Oversight of the corporate portfolio of policies and strategies</b> – Keeping track of policy and strategy delivery across the council and working with directorates and the equalities advisor, to ensure all EAA requirements and consultation/engagement requirements are met; and making connections so that policies and strategies don't happen in directorate silos (and cross-directorate input is sought where appropriate).</li> <li><b>Develop and maintain strategy / policy / action plan templates and guidance</b> – Providing guidance and ensuring that policies and strategies look and feel similar; and are aligned with each other and the corporate strategy.</li> <li><b>EMT Horizon scanning / Policy briefings</b> - Analysing national, regional and/or local policy; making connections between regional and national developments, and Lewisham; and presenting this to Directors via the EMT horizon scan and other briefings as required.</li> <li><b>Network management</b> – Representing the council on the Cooperative Council Innovation Network; the London Policy network; and other related networks and forums.</li> <li><b>Policy projects</b> – Participating in policy style projects such as support in writing bids, subject to capacity.</li> <li><b>Back Up resource to specialist posts</b> -Maintaining a working knowledge of equalities and consultation &amp; engagement including citizen space (if responsibility for consultation and engagement transfers to another service) to cover for the specialist posts as required and avoid single person dependency.</li> <li><b>Mentoring</b> – Helping to embed policy skills and capabilities within the ESO function to allow them to take on additional policy and strategy related work, via mentoring.</li> </ul> </li> </ul>			
<b>Division budget</b>	<b>Gross £</b>	<b>571</b>	<b>Net £k</b>	<b>571</b>
<b>Service area budget</b>	<b>Gross £</b>	<b>6,297</b>	<b>Net £k</b>	<b>5,831</b>
<b>Saving proposed</b>	<b>2023/24 £k</b>	<b>72</b>	<b>2024/25 £k</b>	<b>72</b>

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

<b>Risks:</b>			
<b>Cost shunt to other service? Y</b>	All directorates to absorb a degree of policy work		
<b>Likelihood of making cut in full - %</b>	100%		
<b>Impact of making the saving</b>	<p>There will be some reduction in direct, generalist policy support for Directorates. This will need to be partly absorbed by the directorates and partly absorbed by ESOs.</p> <p>Strategic responsibility for consultation and engagement currently lies with the Director of Communications and Engagement, but a large amount of day to day support is provided by the policy team who advise on consultation and engagement and load surveys onto the council's survey platform: citizen space. This includes statutory surveys. Although a streamlined policy team of two posts could continue to carry out this activity, it would limit the core central activity they can carry out and, at times, would mean they have little capacity to carry out work other than consultation and engagement.</p>		
<b>Possible risk mitigation</b>	<p><i>Equalities</i> - Directorates will have access to a new Equalities Advisor once recruited.</p> <p><i>Consultation and engagement</i> - Although a streamlined policy team of two posts could continue to carry out this activity, if this was transferred, it would mean that strategic responsibility and operational delivery for consultation and engagement could be brought together and the policy team could have a clearer new focus.</p> <p><i>Other Policy support</i> -The council has a range of specialist and generalist posts, across different teams and directorates, which contribute to, and support, policy. Whilst it is proposed that 'pure policy' support is provided by the two remaining SPSOs, generalist support will continue to be provided by ESOs and cabinet support officers; and service transformation support by business analysts. Specialist support will be provided by the performance team, partnership officers, directorate specific policy officers and the new equalities post.</p> <p>Work has already taken place to embed policy skills and capabilities within the ESO function to allow them to take on additional policy and strategy related work.</p>		
<b>Other considerations:</b>			
<b>Member or Officer decision</b>	Officer		
<b>Redundancies</b>	<b>Y/N</b>	<b>N</b>	<b>Number of staff</b>

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

<b>Public consultation</b>	<b>Y/N</b>	N	<b>Audience(s)</b>	
<b>Investment required</b> (value of saving shown above should be net of this investment)	<b>Y/N</b>	N	<b>Cost £k</b>	
	<b>In what:</b>			
<b>Contingent on other actions / decisions / cross service work</b>	The proposal relies on the new Equalities Advisor post being filled and ideally, consultation and engagement being transferred out of the service.			
<b>Specific legal or statutory considerations</b>	The council has statutory responsibilities in relation to equalities and consultation.			

### Equalities Screening Assessment

<b>Impact &amp; Outcomes</b>
<b>What is the likely impact of the proposed changes?</b>
<b>Service Users</b>
The users of this service are internal. There will be some reduction in direct, generalist policy support for Directorates. This will need to be partly absorbed by the directorates and partly absorbed by ESOs. A new specialist equalities advisor post has been agreed and this post will absorb the majority of the equalities work being carried out by the team.
<b>Staff</b>
The post being deleted is vacant. The service provided by the remaining officers will be re-shaped to avoid an impact on workload. The appointment of a specialist equalities post will have a positive impact of the equalities policy support that directorates receive.
<b>Other Council Services</b>
As above. There will be some reduction in direct, generalist policy support for Directorates. This will be partly absorbed by the directorates, ESO and specialist equalities advisor post (which will absorb the majority of the equalities work being carried out by the team).

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

<b>Partners</b>				
The Policy team will continue to work with council partners, representing the council on the Cooperative Council Innovation Network; the London Policy network; and other related networks and forums.				
<b>Are there any specific equalities implications? Please provide a response for each protected characteristic/equalities consideration, even if the impact is neutral.</b>				
Protected characteristics and other equalities considerations	High (Positive / Negative)	Medium (Positive / Negative)	Low (Positive / Negative)	Neutral
Age			X Positive	
Disability			X Positive	
Ethnicity			X Positive	
Gender			X Positive	
Gender reassignment			X Positive	
Marriage and civil partnerships			X Positive	
Pregnancy and maternity			X Positive	
Religion and belief			X Positive	
Sexual orientation			X Positive	
Socio-economic inequality			X Positive	
(The transfer of most equalities support from a generalist central policy team to a specialist equalities advisor post will have an overall positive impact on equalities – the appointment of a specialist equalities advisor was a recommendation of the recent independent review of the Council’s approach to equalities)				
<b>Is a full EAA required?</b>			N	

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

<b>Directorate</b>	Community Services			
<b>Director</b>	Joan Hutton/ Kenneth Gregory			
<b>Service area</b>	Adult Social Care/ Joint Commissioning			
<b>Cabinet Portfolio</b>	Health and Adult Social Care- Cllr Bell			
<b>Reference</b>	COM01 – Homecare Efficiencies			
<b>Saving title</b>	Homecare Efficiencies			
<b>Description of saving</b> (including any specific elements or phasing to be considered)	<p>The new Maximising wellbeing at home (MWAH) contract that went live on 1<sup>st</sup> September 23, has a yearly efficiency factor built into the contract specification that will achieve the 400K savings proposed</p> <p>This is based on efficiencies submitted by successful bidders and as part of MWAH contract. These efficiencies will form of capitated budget for the relevant /target years.</p>			
<b>Division budget</b>	<b>Gross £k</b>	126	<b>Net £k</b>	63
<b>Service area budget</b>	<b>Gross £k</b>	21	<b>Net £k</b>	21
<b>Saving proposed</b>	<b>2023/24 £k</b>		<b>2024/25 £k</b>	<b>400</b>
<b>Risks:</b>				
<b>No</b>	No			
<b>Likelihood of making cut in full - %</b>		80%		
<b>Impact of making the saving</b>	Confirmation that Contract specification has been applied and reduced spend on homecare for same amount of hours. Doing more with less with each pound spent. Only increases will be demographic based and other work around front door eg Newton enablement should keep this within reasonable control			
<b>Possible risk mitigation</b>	Continual monitoring of the contracts and data provided by the providers regarding detail of service hours delivered.			
<b>Other considerations:</b>				
<b>Member or Officer decision</b>	Officer decision			
<b>Redundancies</b>	<b>Y/N</b>	N	<b>Number of staff</b>	

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

<b>Public consultation</b>	<b>Y/N</b>	N	<b>Audience(s)</b>	
<b>Investment required</b> (value of saving shown above should be net of this investment)	<b>Y/N</b>	N	<b>Cost £k</b>	
	<b>In what:</b>	N/A		
<b>Contingent on other actions / decisions / cross service work</b>	No			
<b>Specific legal or statutory considerations</b>	No			

<b>Directorate</b>	Community Services
<b>Director</b>	Joan Hutton
<b>Service area</b>	Adult Social Care
<b>Cabinet Portfolio</b>	Health and Adult Social Care- Cllr Bell
<b>Reference</b>	COM02 – ASC Transitions
<b>Saving title</b>	Transitions
<b>Description of saving</b> (including any specific elements or phasing to be considered)	<p>The analysis of costs associated with young people with SEND who transition to ASC indicates an increase of both demand and cost per care and support plan. It is forecast that the demand in 24-25 is now 32 young people who are going to become 18 during the year. Of the 32 young adults identified, it is unlikely that all of them will need ASC, but from the information we have been given appears at least 26 will need Adult Social Care Services.</p> <p>Initially based on earlier CYP data, we understood the Transition numbers to be 16, this informed the corporate growth funding of 1.5m in total including the transition of 0.8m. The latest data suggests that there is now 800k gap from the initial estimate.</p>

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

	This proposal is in anticipation of increase share of social care grant in 24-25 either from existing pot or from any increases from government funding received by LBL. The total expected funding from the grant should be in the region of 1.4m in order to be able to deliver the savings below. Hence this requires agreement with EMT/Corporate colleagues			
<b>Division budget</b>	<b>Gross £k</b>	126	<b>Net £k</b>	63
<b>Service area budget</b>	<b>Gross £k</b>	31	<b>Net £k</b>	30
		*This is LD Budget (Transitions cuts across various care types)		*Adjusted for CHC only. (Other income is not allocated per service area) 46,502 Res and Nursing only
<b>Saving proposed</b>	<b>2023/24 £k</b>	<b>0</b>	<b>2024/25 £k</b>	<b>600</b>
<b>Risks:</b>				
<b>No</b>		None		
<b>Likelihood of making cut in full - %</b>		80%		
<b>Impact of making the saving</b>	This will reduce the underlying £4-6m pressure in the ASC budgets that is forecast for 24-25			
<b>Possible risk mitigation</b>	<p>This risk is also being managed via improving the Transition system by greater joined up working with CYP so that Transition cases are identified early to allow proactive work in sourcing more suitable and affordable packages in line with ASC client portfolio. The current reality is that upon transfer the average weekly costs of CYP cases are much higher than typical ASC package</p> <p>Also ASC will ensure that those young persons with more complex needs are assessed early for CHC eligibility. This will reduce the cost to the Council</p>			
<b>Other considerations:</b>				
<b>Member or Officer decision</b>	Officer decision			
<b>Redundancies</b>	<b>Y/N</b>	N	<b>Number of staff</b>	
<b>Public consultation</b>	<b>Y/N</b>	N	<b>Audience(s)</b>	
<b>Investment required (value of saving shown)</b>	<b>Y/N</b>	N	<b>Cost £k</b>	
	<b>In what:</b>			

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

above should be net of this investment)		
<b>Contingent on other actions / decisions / cross service work</b>	This saving proposal is contingent on corporate agreement on ASC share of social care grant in 24-25.	
<b>Specific legal or statutory considerations</b>		

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

<b>Directorate</b>	Community Services			
<b>Director</b>	Joan Hutton			
<b>Service area</b>	Adult Social Care			
<b>Cabinet Portfolio</b>	Health and Adult Social Care- Cllr Bell			
<b>Reference</b>	COM03 – ASC Care Home Reviews			
<b>Saving title</b>	Care Home Reviews			
<b>Description of saving</b> (including any specific elements or phasing to be considered)	<p>ASC aims to support residents of the borough with care and support needs to remain at home living as independently as possible. For citizens who have more complex needs, a care home setting is often the safest and appropriate way to meet their needs. Nationally there has been an increase in the complexity of people who require this type of support, particularly for people with advanced dementia and other complex presentations.</p> <p>Adult social care has a duty to review all services users annually who have care and support plans in place.</p> <p>There is a total of 25 Residential and Nursing home placements that have 1:1 and 2:1 support.</p> <p>The review process will work closely with the placement providers to ensure residents are well supported and that their needs continue to be met.</p> <p>There will be an opportunity to manage some of the presentations that have required the additional support by adding capacity to the specialist clinical care home support team.</p> <p>.</p> <p>This saving will require collaborative multi-disciplinary work arrangements that support providers to manage more complex residents effectively and safely and may result in an increase in requests for full CHC or joint funding with health.</p> <p>The implications of the recent Fair Cost of Care exercise that took place in 2022 and the significant rise in costs in providing care has been considered within the data informing this proposal inflation.</p>			
<b>Division budget</b>	<b>Gross £k</b>	126	<b>Net £k</b>	63
<b>Service area budget</b>	<b>Gross £k</b>	47	<b>Net £k</b>	31
		Res and Nursing only		*CHC and Client contributions

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

<b>Saving proposed</b>	<b>2024/25 £k</b>			<b>300</b>
<b>Risks:</b>				
<b>Cost shunt to other service? Y/N</b>	No			
<b>Likelihood of making cut in full - %</b>	65%			
<b>Impact of making the saving</b>	<p>The result of implementing this support to providers should be a positive experience for the residence in terms of how their care and support is delivered.</p> <p>There may be an increase to Health budgets, it could mean that more costs are transferred to Health as more cases reach criteria for CHC full funded, or Health Joint funding.</p>			
<b>Possible risk mitigation</b>	<p>Joint Commissioning will ensure that inflation increases are negotiated and remain within budget. They are also working with local providers to block purchase some beds rather than be totally reliant on a spot purchasing model.</p> <p>There will be additional training and support to Care home staff from specialist clinicians that will allow the reduction to 1-1 Support.</p>			
<b>Other considerations:</b>				
<b>Member or Officer decision</b>	Officer			
<b>Redundancies</b>	<b>Y/N</b>	N	<b>Number of staff</b>	
<b>Public consultation</b>	<b>Y/N</b>	N	<b>Audience(s)</b>	
<b>Investment required</b> (value of saving shown above should be net of this investment)	<b>Y/N</b>	Y	<b>Cost £k</b>	70k
	<b>In what:</b>	To increase capacity within the Care home support team with a focus on support for people with complex dementia and behavioural presentations that require specialist support.		
<b>Contingent on other actions / decisions / cross service work</b>	None			

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

<b>Specific legal or statutory considerations</b>	Care Act and CHC Fund policy
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<b>Directorate</b>	Community Services			
<b>Director</b>	Joan Hutton			
<b>Service area</b>	Adult Social Care			
<b>Cabinet Portfolio</b>	Health and Adult Social Care- Cllr Bell			
<b>Reference</b>	COM05 – ASC Section 117 Recharge			
<b>Saving title</b>	Section 117 recharge to ICB			
<b>Description of saving</b> (including any specific elements or phasing to be considered)	This saving will be achieved by ensuring 50% of all Section 117 aftercare is recharge to the ICB in accordance with the Section 75 Agreement.			
<b>Division budget</b>	<b>Gross £k</b>	126	<b>Net £k</b>	63
<b>Service area budget</b>	<b>Gross £k</b>	7	<b>Net £k</b>	7
		*MH only		*only CHC Netted off
<b>Saving proposed</b>	<b>2023/24 £k</b>		<b>2024/25 £k</b>	<b>650</b>
<b>Risks:</b>				
<b>Cost shunt to other service? Y/N</b>	Yes – to Health in accordance with legislation and local agreement			
<b>Likelihood of making cut in full - %</b>	80%			
<b>Impact of making the saving</b>	This will impact ICB budgets and may impact potential transfers via section 256 agreements.			
<b>Possible risk mitigation</b>	Applying an accurate process to record S117 Service Users on LAS.			

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**APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)**

Other considerations:				
<b>Member or Officer decision</b>	Officer			
<b>Redundancies</b>	<b>Y/N</b>	N	<b>Number of staff</b>	
<b>Public consultation</b>	<b>Y/N</b>	N	<b>Audience(s)</b>	
<b>Investment required</b> (value of saving shown above should be net of this investment)	<b>Y/N</b>	N	<b>Cost £k</b>	
	<b>In what:</b>			
<b>Contingent on other actions / decisions / cross service work</b>	N			
<b>Specific legal or statutory considerations</b>	Yes – Health and Social care legislation that determine the threshold for what constitutes health funded responsibilities.			

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

<b>Directorate</b>	Community Services			
<b>Director</b>	Joan Hutton			
<b>Service area</b>	Adult Social Care			
<b>Cabinet Portfolio</b>	Health and Adult Social Care- Cllr Bell			
<b>Reference</b>	COM04– ASC Staffing Reorganisation			
<b>Saving title</b>	Staffing reorganisation across Adult Social Care			
<b>Description of saving</b> (including any specific elements or phasing to be considered)	<p>A reorganisation proposal of staffing across Adult Social Care assessment teams is in Draft form.</p> <p>The intention of this proposal is to strengthen our approach to the management of demand, multi-disciplinary working and to further embed the Principles of the Empowering Lewisham programme of improvement.</p> <p>A planned recruitment campaign will also reduce reliance on agency staff, conclude secondments and Acting up arrangements that are currently in place. Agency staff will be replaced with permanent staff, and some posts now covered by agency will be deleted.</p> <p>This will also strengthen our position regarding staff retention in preparation for our forthcoming CQC inspection.</p>			
<b>Division budget</b>	<b>Gross £k</b>	126	<b>Net £k</b>	63
<b>Service area budget</b>	<b>Gross £k</b>	21	<b>Net £k</b>	21
				*S75 recharge adjusted
<b>Saving proposed</b>	<b>2023/24 £k</b>		<b>2024/25 £k</b>	<b>350</b>
<b>Risks:</b>				
<b>Cost shunt to other service? Y/N</b>		No		
<b>Likelihood of making cut in full - %</b>		100%		
<b>Impact of making the saving</b>	This will have a Positive impact on service delivery as the reorganisation will further embed the EL programme of work.			

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<b>Possible risk mitigation</b>	<p>Consultation with staff will facilitate an opportunity to manage this change in accordance with the Councils HR procedures.</p> <p>There remains a risk that recruitment process may not be successful in filling posts and that this will mean continuing reliance on agency cover. Experienced Social care workers are in high demand across London</p>		
<b>Other considerations:</b>			
<b>Member or Officer decision</b>	Officer		
<b>Redundancies</b>	Y/N	N	<b>Number of staff</b>
<b>Public consultation</b>	Y/N	N	<b>Audience(s)</b>
<b>Investment required</b> (value of saving shown above should be net of this investment)	Y/N	N	<b>Cost £k</b>
	<b>In what:</b>		
<b>Contingent on other actions / decisions / cross service work</b>	No		
<b>Specific legal or statutory considerations</b>	No		

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

<b>Directorate</b>	Community Services			
<b>Director</b>	Joan Hutton			
<b>Service area</b>	Adult Social Care			
<b>Cabinet Portfolio</b>	Health and Adult Social Care- Cllr Bell			
<b>Reference</b>	COM06 – ASC Arranging Care Fees & Charges ASC07_24_29			
<b>Saving title</b>	Fees and Charges increases			
<b>Description of saving</b> (including any specific elements or phasing to be considered)	<p>This proposal is in accordance with Care Act 2014 legislation and the National Fairer Charging policy that allows LA's to Charge a fee for arranging care and support to those residents assessed to pay full costs for their care.</p> <p>The saving will be achieved by:</p> <ol style="list-style-type: none"> <li>1. An annual increase in charging based on inflation increases.</li> <li>2. By introducing an annual fee from April 24 to all full cost paying Services users in receipt of ASC services where we have arranged and commissioned their care.</li> </ol>			
<b>Division budget</b>	<b>Gross £k</b>	126	<b>Net £k</b>	63
<b>Service area budget</b>	<b>Gross £k</b>	11	<b>Net £k</b>	11
		*client contributions		
<b>Saving proposed</b>	<b>2023/24 £k</b>		<b>2024/25 £k</b>	<b>150</b>
<b>Risks:</b>				
<b>Cost shunt to other service? Y/N</b>	No			
<b>Likelihood of making cut in full - %</b>	85%			
<b>Impact of making the saving</b>	Increased costs to Service Users. Full cost payers may choose to organise their own care; therefore, we will not get the full income for charging for this function.			
<b>Possible risk mitigation</b>	<p>Ensuring all new Service Users have a financial assessment as soon as they become Care Act eligible.</p> <p>The fees paid to providers via the LA are often more cost effective than those privately sourced.</p>			

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

	The quality of care is monitored as part of contract monitoring by Joint commissioning.			
<b>Other considerations:</b>				
<b>Member or Officer decision</b>	Officer, this has already had Members decision.			
<b>Redundancies</b>	<b>Y/N</b>	<b>N</b>	<b>Number of staff</b>	
<b>Public consultation</b>	<b>Y/N</b>	<b>N</b>	<b>Audience(s)</b>	
<b>Investment required</b> (value of saving shown above should be net of this investment)	<b>Y/N</b>	<b>N</b>	<b>Cost £k</b>	
	<b>In what:</b>			
<b>Contingent on other actions / decisions / cross service work</b>	May impact the workload of the Financial and Money Management Team.			
<b>Specific legal or statutory considerations</b>	Care Act and Fairer Charging Guidance			

## ASC Equalities Screening Template

Change : Home care efficiencies

The new Maximising wellbeing at home (MWAH) contract that went live on 1<sup>st</sup> September 23, has a yearly efficiency factor built into the contract specification that will achieve the £400K savings proposed

<b>Impact &amp; Outcomes</b>
<b>What is the likely impact of the proposed changes?</b>
<b>Service Users</b>
<b>Is this report easy to understand?</b> Please give us feedback so we can improve. Go to <a href="https://lewisham.gov.uk/contact-us/feedback-on-our-reports">https://lewisham.gov.uk/contact-us/feedback-on-our-reports</a>

## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

None anticipated				
<b>Staff</b>				
None anticipated				
<b>Other Council Services</b>				
None anticipated				
<b>Partners</b>				
Partners have agreed to an efficiency factor from year 2 of their contract onwards as part of the procurement exercise and with the understanding that they are getting the full fair cost of care upfront.				
<b>Are there any specific equalities implications? Please provide a response for each protected characteristic/equalities consideration, even if the impact is neutral.</b>				
Protected characteristics and other equalities considerations	High (Positive / Negative)	Medium (Positive / Negative)	Low (Positive / Negative)	Neutral
Age				X
Disability				X
Ethnicity				X
Gender				X
Gender reassignment				X
Marriage and civil partnerships				X
Pregnancy and maternity				X
Religion and belief				X
Sexual orientation				X
Socio-economic inequality				X
Is a full EAA required?			No	

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	(with Corporate Policy input)
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## Equalities Screening Template

Change : Transitions

This proposal is in anticipation of increase share of social care grant in 24-25 either from existing pot or from any increases from government funding received by LBL. The total expected funding from the grant should be in the region of 1.4m in order to be able to deliver the savings below. Hence this requires agreement with EMT/Corporate colleagues. THIS IS RELIANT ON THE SERVICE GETTING ADDITIONAL FUNDING OVER AND ABOVE CURRENT MTFs ASSUMPTIONS

Impact & Outcomes				
<b>What is the likely impact of the proposed changes?</b>				
<b>Service Users</b>				
None anticipated				
<b>Staff</b>				
None anticipated				
<b>Other Council Services</b>				
Funding is expected to come from additional sources				
<b>Partners</b>				
None anticipated				
<b>Are there any specific equalities implications? Please provide a response for each protected characteristic/equalities consideration, even if the impact is neutral.</b>				
Protected characteristics and other equalities considerations	High (Positive / Negative)	Medium (Positive / Negative)	Low (Positive / Negative)	Neutral
Age				X

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

Disability				X
Ethnicity				X
Gender				X
Gender reassignment				X
Marriage and civil partnerships				X
Pregnancy and maternity				X
Religion and belief				X
Sexual orientation				X
Socio-economic inequality				X
Is a full EAA required?			No (with Corporate Policy input)	

## Equalities Screening Template

Change : Care Home Reviews

This saving will require collaborative multi-disciplinary work arrangements that support providers to manage more complex residents effectively and safely and may result in an increase in requests for full CHC or joint funding with health.

<b>Impact &amp; Outcomes</b>
What is the likely impact of the proposed changes?
<b>Service Users</b>
More complex service users across all protected characteristics will be supported in their care homes
<b>Staff</b>
None anticipated

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**APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)**

<b>Other Council Services</b>				
<b>Partners</b>				
MDT Working				
<b>Are there any specific equalities implications? Please provide a response for each protected characteristic/equalities consideration, even if the impact is neutral.</b>				
<b>Protected characteristics and other equalities considerations</b>	<b>High (Positive / Negative)</b>	<b>Medium (Positive / Negative)</b>	<b>Low (Positive / Negative)</b>	<b>Neutral</b>
Age				x
Disability		positive		
Ethnicity				x
Gender				x
Gender reassignment				x
Marriage and civil partnerships				x
Pregnancy and maternity				x
Religion and belief				x
Sexual orientation				x
Socio-economic inequality				x
<b>Is a full EAA required?</b>			No (with Corporate Policy input)	

## Equalities Screening Template

Change :

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

Section 117 recharge to ICB	This saving will be achieved by ensuring 50% of all Section 117 aftercare is recharge to the ICB in accordance with the Section 75 Agreement.
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Impact & Outcomes				
What is the likely impact of the proposed changes?				
<b>Service Users</b>				
None anticipated				
<b>Staff</b>				
None anticipated				
<b>Other Council Services</b>				
None anticipated				
<b>Partners</b>				
Recharged to ICB in accordance with the S75 agreement				
Are there any specific equalities implications? <u>Please provide a response for each protected characteristic/equalities consideration, even if the impact is neutral.</u>				
Protected characteristics and other equalities considerations	High (Positive / Negative)	Medium (Positive / Negative)	Low (Positive / Negative)	Neutral
Age				X
Disability				X
Ethnicity				X
Gender				X
Gender reassignment				X
Marriage and civil partnerships				X
Pregnancy and maternity				X
Religion and belief				X

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

Sexual orientation				X
Socio-economic inequality				X
Is a full EAA required?			No (with Corporate Policy input)	

## Equalities Screening Template

Change :

Staffing reorganisation across Adult Social Care	The intention of this proposal is to strengthen our approach to the management of demand, multi-disciplinary working and to further embed the Principles of the Empowering Lewisham programme of improvement.
--	---

Impact & Outcomes				
<b>What is the likely impact of the proposed changes?</b>				
<b>Service Users</b>				
None anticipated				
<b>Staff</b>				
Staff restructure focusing on agency and temporary staff				
<b>Other Council Services</b>				
None anticipated				
<b>Partners</b>				
None anticipated				
<b>Are there any specific equalities implications? Please provide a response for each protected characteristic/equalities consideration, even if the impact is neutral.</b>				
Protected characteristics and other equalities considerations	High (Positive / Negative)	Medium (Positive / Negative)	Low (Positive / Negative)	Neutral
Age				X

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

Disability				X
Ethnicity				X
Gender				X
Gender reassignment				X
Marriage and civil partnerships				X
Pregnancy and maternity				X
Religion and belief				X
Sexual orientation				X
Socio-economic inequality				X
Is a full EAA required?	No (with Corporate Policy input)			

## Equalities Screening Template

Change :

Fees and Charges increases	This proposal is in accordance with Care Act 2014 legislation and the National Fairer Charging policy that allows LA's to Charge a fee for arranging care and support to those residents assessed to pay full costs for their care.
----------------------------	---

### Impact & Outcomes

What is the likely impact of the proposed changes?

#### Service Users

Those who are assessed to pay full cost for their care will be charged a brokerage fee, in line with the National Fairer Charging Policy. Clients will therefore be selected regardless of equalities but based on their level of income/savings.

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

<b>Staff</b>				
None anticipated				
<b>Other Council Services</b>				
None anticipated				
<b>Partners</b>				
None anticipated				
<b>Are there any specific equalities implications? Please provide a response for each protected characteristic/equalities consideration, even if the impact is neutral.</b>				
Protected characteristics and other equalities considerations	High (Positive / Negative)	Medium (Positive / Negative)	Low (Positive / Negative)	Neutral
Age				x
Disability				x
Ethnicity				x
Gender				x
Gender reassignment				x
Marriage and civil partnerships				x
Pregnancy and maternity				x
Religion and belief				x
Sexual orientation				x
Socio-economic inequality				x
<b>Is a full EAA required?</b>			No (with Corporate Policy input)	

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

<b>Directorate</b>	Community Service			
<b>Director</b>	James Lee			
<b>Service area</b>	Leisure Services			
<b>Cabinet Portfolio</b>	Culture, Leisure and Communications- Cllr Walsh			
<b>Reference</b>	COM08 – Leisure Service Savings			
<b>Saving title</b>	Leisure Services Savings			
<b>Description of saving</b> (including any specific elements or phasing to be considered)	<ul style="list-style-type: none"> <li>£100K –will be available from revenue generated when the Leisure Contract share of surplus mechanism kicks in 24/25 forward</li> <li>£20k – removal of professional consultancy fees, 23/24 forward</li> <li>£10k – work R&amp;M contingency at Downham Leisure Centre 23/24 forward</li> </ul>			
<b>Division budget</b>	<b>Gross £k</b>	29,249	<b>Net £k</b>	14,144
<b>Service area budget</b>	<b>Gross £k</b>		<b>Net £k</b>	Leisure currently supported by provisions
<b>Saving proposed</b>	<b>2023/24 £k</b>	<b>30</b>	<b>2024/25 £k</b>	<b>130</b>
<b>Risks:</b>				
<b>Cost shunt to other service? Y/N</b>	No			
<b>Likelihood of making cut in full - %</b>	100%			
<b>Impact of making the saving</b>	The revenue generated via the share of surplus could have been directed to cover other potential emerging pressure in the Leisure Service such as the outcome of the Downham PFI benchmarking process that is currently underway.			
<b>Possible risk mitigation</b>	<p>The level of consultancy support has reduced since placing the Leisure Contract on a sound footing.</p> <p>PFI contractor at Downham Leisure Centre has a contractual responsibility to undertake R&amp;M on the site robust contract monitoring procedures ensure that these works are being completed removing the necessity to spend the contingency.</p>			
<b>Other considerations:</b>				
<b>Member or Officer decision</b>	Officer			
<b>Redundancies</b>	<b>Y/N</b>	N	<b>Number of staff</b>	
<b>Public consultation</b>	<b>Y/N</b>	N	<b>Audience(s)</b>	

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

Investment required (value of saving shown above should be net of this investment)	Y/N	N	Cost £k	
	In what:			
Contingent on other actions / decisions / cross service work	N/A			
Specific legal or statutory considerations	N/A			

### EAA Screening

Impact & Outcomes				
<b>What is the likely impact of the proposed changes?</b>				
<b>Service Users</b>				
No direct impact on service users				
<b>Staff</b>				
No direct impact on staff				
<b>Other Council Services</b>				
No direct impact on other services				
<b>Partners</b>				
No direct Impact on Partners				
<b>Are there any specific equalities implications? Please provide a response for each protected characteristic/equalities consideration, even if the impact is neutral.</b>				
Protected characteristics and other equalities considerations	High (Positive / Negative)	Medium (Positive / Negative)	Low (Positive / Negative)	Neutral
Age				x
Disability				x

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

<b>Ethnicity</b>				x
<b>Gender</b>				x
<b>Gender reassignment</b>				x
<b>Marriage and civil partnerships</b>				x
<b>Pregnancy and maternity</b>				x
<b>Religion and belief</b>				x
<b>Sexual orientation</b>				x
<b>Socio-economic inequality</b>				x
<b>Is a full EAA required?</b>				No

<b>Directorate</b>	Community Partnerships and Leisure – Community Services			
<b>Director</b>	James Lee			
<b>Service area</b>	Community Education and Cultural Assets			
<b>Cabinet Portfolio</b>	Culture, Leisure and Communications- Cllr Walsh			
<b>Reference</b>	COM07 – ALL GF Subsidy Reduction			
<b>Saving title</b>	Adult Learning Lewisham reduction in general fund subsidy for salary enhancements			
<b>Description of saving</b> (including any specific elements or phasing to be considered)	One off Savings of £100K for 2023/24 and 2024/25 from the core budget contribution to the uplift on Salaries at ALL			
<b>Division budget</b>	<b>Gross £k</b>	29,249	<b>Net £k</b>	14,144
<b>Service area budget</b>	<b>Gross £k</b>	£3,943	<b>Net £k</b>	£231
<b>Saving proposed</b>	<b>2023/24 £k</b>	<b>100</b>	<b>2024/25 £k</b>	<b>100</b>
<b>Risks:</b>				
<b>Cost shunt to other service? Y/N</b>	If 'yes' identify the service impacted. N			

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

Likelihood of making cut in full - %	100%		
Impact of making the saving	The service has an increase of funding from GLA in 23/24 of £65K due to over performance against the GLA AEB budget allocation and the service in predicting an overall underspend. The London factor uplift has been increased, which means there is more funding allocated per learner, with learner enrolments increasing and class numbers growing this means that courses will draw down more funding and therefore we can increase the cost efficiency of course delivery.		
Possible risk mitigation	There is the potential with the London factor uplift that the service will continue to over perform within the 3% tolerance, which represents up to an additional £100K per academic year.  The service also has a reserve from the ring-fenced funding allocation which could mitigate against the risks of underperformance or the impact of salary uplifts in 2023/24 and 2024/25.		
Other considerations:			
Member or Officer decision	Officer		
Redundancies	Y/N	N	Number of staff
Public consultation	Y/N	N	Audience(s)
Investment required (value of saving shown above should be net of this investment)	Y/N	N	Cost £k
	In what:	N	
Contingent on other actions / decisions / cross service work			
Specific legal or statutory considerations	The GLA AEB funding is ring fenced for the delivery of adult education only. This means that we are only able to make cuts from the general fund subsidy to salary increases for 23/24 and 24/25 to support the savings programme which will align with the contractual funding agreement		

### Impact & Outcomes

#### What is the likely impact of the proposed changes?

##### Service Users

Include evidence to support anticipated impacts, both positive and negative.

There will be no impact on service users as the savings from the general fund subsidy for the uplift in salaries will be absorbed by the services external funding allocation and income generation. This will not result in a reduction in service delivery but will be managed by spending controls on consumable resources etc.

##### Staff

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

<p>Include evidence to support anticipated impacts, both positive and negative.</p> <p>There will be no impact on staff as the savings from the general fund subsidy for the uplift in salaries will be absorbed by the services external funding allocation and income generation. This will not result in a reorganisation of the service structure but will be managed by spending controls on consumable resources etc.</p>				
<p><b>Other Council Services</b></p>				
<p>Include evidence to support anticipated impacts, both positive and negative.</p> <p>Adult Learning Lewisham will continue to be able to support other council services with the provision of courses as this is funded externally and the proposed cuts will be absorbed by the services grant funding and income generation through learner fees.</p>				
<p><b>Partners</b></p>				
<p>Include evidence to support anticipated impacts, both positive and negative.</p> <p>Adult Learning Lewisham will continue to be able to work collaboratively with key community partners with the provision of courses as this is funded externally and the proposed cuts will be absorbed by the services grant funding and income generation through learner fees.</p>				
<p><b>Are there any specific equalities implications? Please provide a response for each protected characteristic/equalities consideration, even if the impact is neutral.</b></p>				
Protected characteristics and other equalities considerations	High (Positive / Negative)	Medium (Positive / Negative)	Low (Positive / Negative)	Neutral
Age				x
Disability				X
Ethnicity				X
Gender				X
Gender reassignment				X
Marriage and civil partnerships				X
Pregnancy and maternity				X
Religion and belief				X
Sexual orientation				X
Socio-economic inequality				X
Is a full EAA required?			Y/N (with Corporate Policy input)	

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

<b>Directorate</b>	Community Service			
<b>Director</b>	Catherine Mbema			
<b>Service area</b>	Public Health			
<b>Cabinet Portfolio</b>	Businesses, Jobs and Skills- Cllr Powell			
<b>Reference</b>	COM10 – Public Health NCDP			
<b>Saving title</b>	Neighbourhood Community Development Partnerships (NCDP) saving (PH grant substitution).			
<b>Description of saving</b> (including any specific elements or phasing to be considered)	<ul style="list-style-type: none"> <li>£90k currently allocated to public health area-based programmes, which has been used to support our Neighbourhood Community Development Partnerships.</li> <li>Neighbourhood Community Development Partnerships (NCDPs) bring together relevant partners in each Neighbourhood in Lewisham to identify resources within communities to maximise their potential while also highlighting gaps in service provision and working with the local voluntary sector to develop services to meet local needs.</li> </ul>			
<b>Division budget</b>	<b>Gross £k</b>	29,914	<b>Net £k</b>	£Nil
<b>Service area budget</b>	<b>Gross £k</b>	90	<b>Net £k</b>	90
<b>Saving proposed</b>	<b>2023/24 £k</b>		<b>2024/25 £k</b>	<b>90</b>
<b>Risks:</b>				
<b>Cost shunt to other service? Y/N</b>	No			
<b>Likelihood of making cut in full - %</b>	100%			
<b>Impact of making the saving</b>	<p>Since the start of the COVID-19 pandemic the funding for Neighbourhood Community Development Partnerships (NCDPs) has been repurposed to support emergency food provision/food justice work in the borough owing to the inability of the Partnerships to run during the pandemic. This financial year some of this funding has also been repurposed to support the development of Health Equity Teams in the borough for each Primary Care Network (PCN) in Lewisham, which are a more recent form of area/neighbourhood work that public health is supporting. Since the NCDPs have now not run for a number of years the impact of them not restarting will be mild, however there will be a risk to the ongoing support that can be provided to work on food justice and Health Equity Teams by making this public health (PH) grant substitution/saving.</p>			
<b>Possible risk mitigation</b>	<p>There is South-East London Integrated Care Board (SEL ICB) work underway to develop integrated neighbourhood teams that may provide some degree of mitigation to not having NCDPs in place. If sustained the In terms of food justice work, fixed-term funding from other areas of PH grant</p>			

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

	will provide short term mitigation for no longer being able to repurpose NCDP funding to support this work.		
<b>Other considerations:</b>			
<b>Member or Officer decision</b>	Officer		
<b>Redundancies</b>	<b>Y/N</b>	N	<b>Number of staff</b>
<b>Public consultation</b>	<b>Y/N</b>	N	<b>Audience(s)</b>
<b>Investment required</b> (value of saving shown above should be net of this investment)	<b>Y/N</b>	N	<b>Cost £k</b>
	<b>In what:</b>		
<b>Contingent on other actions / decisions / cross service work</b>	N/A		
<b>Specific legal or statutory considerations</b>	N/A		

### Equalities Screening Template

<b>Impact &amp; Outcomes</b>
<b>What is the likely impact of the proposed changes?</b>
<b>Service Users</b>
The service users that would have been attendees of the NCDP funded projects for the 2019/2020 period include younger residents, residents over 60 years and residents from Black, Asian and Minority Ethnic communities. Residents that would benefit from NCDP funded projects may therefore be impacted by the proposed changes with potential mitigations for these impacts outlined in the savings proforma attached.
<b>Staff</b>
There are no direct equalities implications for Lewisham Council staff as a result of these changes.
<b>Other Council Services</b>
There are no direct equalities implications for Lewisham Council staff as a result of these changes.

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**APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)**

<b>Partners</b>				
NCDPs were supported by Community Connections Lewisham so there may be some impact for this partnership initiative by the proposed changes.				
<b>Are there any specific equalities implications? Please provide a response for each protected characteristic/equalities consideration, even if the impact is neutral.</b>				
<b>Protected characteristics and other equalities considerations</b>	<b>High (Positive / Negative)</b>	<b>Medium (Positive / Negative)</b>	<b>Low (Negative)</b>	<b>Neutral</b>
<b>Age</b>			x	
<b>Disability</b>			x	
<b>Ethnicity</b>			x	
<b>Gender</b>			x	
<b>Gender reassignment</b>				x
<b>Marriage and civil partnerships</b>				x
<b>Pregnancy and maternity</b>			x	
<b>Religion and belief</b>			x	
<b>Sexual orientation</b>				x
<b>Socio-economic inequality</b>			x	
<b>Is a full EAA required?</b>			Y/N (with Corporate Policy input)	

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

<b>Directorate</b>	Corporate Resources			
<b>Director</b>	Rich Clarke			
<b>Service area</b>	Assurance (Cross Service)			
<b>Cabinet Portfolio</b>	Finance and Strategy - Cllr de Ryk			
<b>Reference</b>	COR01 – Assurance Budget Adjustments			
<b>Saving title</b>	Various Assurance Budget Adjustments			
<b>Description of saving</b> (including any specific elements or phasing to be considered)	<p>Various budget adjustments within Assurance to bring budgets in line with expected expenditure and remove historical anomalies (including some growth items). Individual recurring changes &gt;£10k</p> <ul style="list-style-type: none"> <li>• +£33k, cease practice of recharging audit to schools</li> <li>• +£29k, additional A-FACT apprentice (2yr scheme)</li> <li>• £25k, re-tender Lewisham Homes inherited internal audit support (currently total GF/LH budget is c.£70k, anticipate new contract to be awarded at c.£45k. Estimated split of that contract would be £10k GF, £35k HRA resulting in £10k GF saving and £15k HRA saving but this is an estimate subject to recharge arrangements tbc on workload split).</li> <li>• £25k, relinquishing contingency held in H&amp;S budget for restructure</li> <li>• £20k, expected re-tender of combined building inspection contract</li> <li>• £15k, achieved saving following H&amp;S software re-procurement</li> </ul>			
<b>Division budget</b>	<b>Gross £k</b>	5,744	<b>Net £k</b>	2,775
<b>Service area budget</b>	<b>Gross £k</b>	5,744	<b>Net £k</b>	2,775
<b>Saving proposed</b>	<b>2023/24 £k</b>		<b>2024/25 £k</b>	<b>35</b>
<b>Risks:</b>				
<b>Cost shunt to other service? Y/N</b>	No			
<b>Likelihood of making cut in full - %</b>	90%			
<b>Impact of making the saving</b>	Various impacts, but all regarded as manageable.			
<b>Possible risk mitigation</b>	Various mitigations, but all regarded as achievable.			
<b>Other considerations:</b>				
<b>Member or Officer decision</b>	Officer.			
<b>Redundancies</b>	<b>Y/N</b>	No	<b>Number of staff</b>	n/a
<b>Public consultation</b>	<b>Y/N</b>	No	<b>Audience(s)</b>	n/a

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

Investment required (value of saving shown above should be net of this investment)	Y/N	No	Cost £k	£0
	In what:			
Contingent on other actions / decisions / cross service work	None.			
Specific legal or statutory considerations	None.			

## Equalities Screening Template: Assurance – Cross Service

Impact & Outcomes				
What is the likely impact of the proposed changes?				
<b>Service Users</b>				
None. Services are not public facing.				
<b>Staff</b>				
None. Changes are not staff related save A-FACT apprentice recruitment.				
<b>Other Council Services</b>				
Minimal. Largely arising through releasing contingency or effective procurement.				
<b>Partners</b>				
None.				
Are there any specific equalities implications? Please provide a response for each protected characteristic/equalities consideration, even if the impact is neutral.				
Protected characteristics and other equalities considerations	High (Positive / Negative)	Medium (Positive / Negative)	Low (Positive / Negative)	Neutral
Age				X
Disability				X
Ethnicity				X
Gender				X

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

Gender reassignment				X
Marriage and civil partnerships				X
Pregnancy and maternity				X
Religion and belief				X
Sexual orientation				X
Socio-economic inequality				X
Is a full EAA required?				No

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

<b>Directorate</b>	Corporate Resources			
<b>Director</b>	Rich Clarke			
<b>Service area</b>	Insurance & Risk			
<b>Cabinet Portfolio</b>	Finance and Strategy - Cllr de Ryk			
<b>Reference</b>	COR02 – Assurance Insurance Contracts			
<b>Saving title</b>				
Insurance Contract				
<b>Description of saving</b> (including any specific elements or phasing to be considered)	We recently awarded new contracts for the Council's insurances as part of a scheduled recruitment. These contracts will commence 1/12/23 and run for five years.			
<b>Division budget</b>	<b>Gross £k</b>	5,744	<b>Net £k</b>	2,775
<b>Service area budget</b>	<b>Gross £k</b>	4,454	<b>Net £k</b>	1,566
<b>Saving proposed</b>	<b>2023/24 £k</b>	<b>68</b>	<b>2024/25 £k</b>	<b>203</b>
<b>Risks:</b>				
<b>Cost shunt to other service? Y/N</b>	No			
<b>Likelihood of making cut in full - %</b>	95%			
<b>Impact of making the saving</b>	None. Providing sufficient coverage was a qualifying requirement for suppliers. Therefore we retain expected coverage levels. Note that c.25% of the saving will be charged to HRA as the insurance covers Council residential properties.			
<b>Possible risk mitigation</b>	N/A			
<b>Other considerations:</b>				
<b>Member or Officer decision</b>	Delegated officer decision to be made by David Austin.			
<b>Redundancies</b>	<b>Y/N</b>	No	<b>Number of staff</b>	n/a
<b>Public consultation</b>	<b>Y/N</b>	No	<b>Audience(s)</b>	n/a
<b>Investment required</b> (value of saving shown above should be net of this investment)	<b>Y/N</b>	No	<b>Cost £k</b>	£0
	<b>In what:</b>			

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

<b>Contingent on other actions / decisions / cross service work</b>	Contract award decision pending
<b>Specific legal or statutory considerations</b>	Small inherent risk that award may be challenged by unsuccessful suppliers, but no challenge expected. Process completed alongside Council procurement team from start to finish and so confident on compliance.

## Equalities Screening Template: Assurance – Insurance Contracts

Impact & Outcomes				
<b>What is the likely impact of the proposed changes?</b>				
<b>Service Users</b>				
None. New contracts materially retain level of extent of insurance coverage held on pre 1/12/23 contracts.				
<b>Staff</b>				
None. New contracts materially retain level of extent of insurance coverage held on pre 1/12/23 contracts.				
<b>Other Council Services</b>				
None. New contracts materially retain level of extent of insurance coverage held on pre 1/12/23 contracts.				
<b>Partners</b>				
None. New contracts materially retain level of extent of insurance coverage held on pre 1/12/23 contracts.				
<b>Are there any specific equalities implications? Please provide a response for each protected characteristic/equalities consideration, even if the impact is neutral.</b>				
Protected characteristics and other equalities considerations	High (Positive / Negative)	Medium (Positive / Negative)	Low (Positive / Negative)	Neutral
Age				X
Disability				X
Ethnicity				X
Gender				X

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

Gender reassignment				X
Marriage and civil partnerships				X
Pregnancy and maternity				X
Religion and belief				X
Sexual orientation				X
Socio-economic inequality				X
Is a full EAA required?				No

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

<b>Directorate</b>	Corporate Resources			
<b>Director</b>	Rich Clarke			
<b>Service area</b>	Internal Audit			
<b>Cabinet Portfolio</b>	Finance and Strategy - Cllr de Ryk			
<b>Reference</b>	COR03 – Internal Audit Restructure			
<b>Saving title</b>	Internal Audit Restructure			
<b>Description of saving</b> (including any specific elements or phasing to be considered)	Current vacant post. Propose not replacing at all in 2023/24 and instead spreading work among existing staff (current saving proposed). For 2024/25 look to replace the post with a more junior post focussed on maintaining risk information.			
<b>Division budget</b>	<b>Gross £k</b>	5,744	<b>Net £k</b>	2,775
<b>Service area budget</b>	<b>Gross £k</b>	454	<b>Net £k</b>	421
<b>Saving proposed</b>	<b>2023/24 £k</b>	17	<b>2024/25 £k</b>	15
<b>Risks:</b>				
<b>Cost shunt to other service? Y/N</b>	No			
<b>Likelihood of making cut in full - %</b>	70%			
<b>Impact of making the saving</b>	Reduced internal audit capacity.			
<b>Possible risk mitigation</b>	Hope to manage the impact via better targeted audit derived from improved risk information.			
<b>Other considerations:</b>				
<b>Member or Officer decision</b>	Officer (Head of Assurance, with appropriate permissions for amended post).			
<b>Redundancies</b>	<b>Y/N</b>	No	<b>Number of staff</b>	n/a
<b>Public consultation</b>	<b>Y/N</b>	No	<b>Audience(s)</b>	n/a
<b>Investment required</b> (value of saving shown above should be net of this investment)	<b>Y/N</b>	No	<b>Cost £k</b>	£0
	<b>In what:</b>			
<b>Contingent on other actions / decisions / cross service work</b>	Spend rest of 23/24 determining demand for risk information. Working expectation is as per this form; need for a more junior employee to help manage risk register. However, it is possible with more self-service across the Council the post may not be needed at all (in which case saving c.£50k).			

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Specific legal or statutory considerations	None.
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## Equalities Screening Template: Assurance – Internal Audit

Impact & Outcomes				
What is the likely impact of the proposed changes?				
<b>Service Users</b>				
None. IA is not a public facing service.				
<b>Staff</b>				
Minimal. All changes proposed relate to vacant posts. Replacement post is more junior and presents opportunity to recruit early-career individual.				
<b>Other Council Services</b>				
None.				
<b>Partners</b>				
None.				
Are there any specific equalities implications? Please provide a response for each protected characteristic/equalities consideration, even if the impact is neutral.				
Protected characteristics and other equalities considerations	High (Positive / Negative)	Medium (Positive / Negative)	Low (Positive / Negative)	Neutral
Age				X
Disability				X
Ethnicity				X
Gender				X
Gender reassignment				X
Marriage and civil partnerships				X

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

Pregnancy and maternity				X
Religion and belief				X
Sexual orientation				X
Socio-economic inequality				X
Is a full EAA required?			No	

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

<b>Directorate</b>	Corporate Resources			
<b>Director</b>	Katharine Nidd			
<b>Service area</b>	Finance			
<b>Cabinet Portfolio</b>	Finance and Strategy – Cllr De Ryk			
<b>Reference</b>	COR04 – Finance Structure Revisions			
<b>Saving title</b>	Finance Savings			
<b>Description of saving</b> (including any specific elements or phasing to be considered)	As at P4 Finance were reporting an underspend and therefore all savings will take effect from 1 April 2024. The saving is a mixture of re-structuring historically hard to fill vacant posts (including a full review of the payroll service) and minor revisions to structures to drive efficiencies out.			
<b>Division budget</b>	<b>Gross £k</b>	8,491	<b>Net £k</b>	6,100
<b>Service area budget</b>	<b>Gross £k</b>	8,491	<b>Net £k</b>	6,100
<b>Saving proposed</b>	<b>2023/24 £k</b>	0	<b>2024/25 £k</b>	250
<b>Risks:</b>				
<b>Cost shunt to other service? Y/N</b>	No			
<b>Likelihood of making cut in full - %</b>	100%			
<b>Impact of making the saving</b>	This will slightly reduce resilience within the finance function, and remove any capacity for making significant change or improvement without additional resource in the future.			
<b>Possible risk mitigation</b>	We are undertaking a review of recharges for those services paid by others (schools, HRA, GF), this may offset risk in Finance but may result in cost shunt.			
<b>Other considerations:</b>				
<b>Member or Officer decision</b>	Officer			
<b>Redundancies</b>	<b>Y/N</b>	N	<b>Number of staff</b>	N/A

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

<b>Public consultation</b>	<b>Y/N</b>	N	<b>Audience(s)</b>	N/A
<b>Investment required</b> (value of saving shown above should be net of this investment)	<b>Y/N</b>	N	<b>Cost £k</b>	N/A
	<b>In what:</b>	N/A		
<b>Contingent on other actions / decisions / cross service work</b>	None initially, as part of budget setting the review of recharges may involve discussion with other services.			
<b>Specific legal or statutory considerations</b>	None			

## 1. Equalities Screening Template

For each of the nine protected characteristics, identify whether the proposal has a high, medium, low or neutral impact on service users and whether this is a positive or negative impact.

Identify whether the proposal has a high, medium, low or neutral impact on socio-economic inequality (e.g. low income, fuel poverty, food insecurity, digital inclusion etc) and whether this is a positive or negative impact.

Identify whether a full service equalities analysis assessment is required for this proposal based on this Equalities Analysis Toolkit. For advice on whether an EAA is required and how to assess service equalities impact please contact [policy@lewisham.gov.uk](mailto:policy@lewisham.gov.uk)

<b>Impact &amp; Outcomes</b>
<b>What is the likely impact of the proposed changes?</b>
<b>Service Users</b>
There should be very little impact on service users, the changes mostly relate to vacant posts which are being delivered in other ways, therefore there should be minimal noticeable change for service users within the Council.

### Is this report easy to understand?

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

<b>Staff</b>				
There is a planned restructure of the Payroll service which staff have been made aware of as this has already been planned. There are a number of hard to fill vacant posts across finance which will either be deleted or reviewed/changed and which will not affect any staff directly, and there is a deletion of a single post which will impact on a staff member, however they will be assimilated into an existing equivalent role.				
<b>Other Council Services</b>				
There is not expected to be any impact on other Council Services, however, in making savings this slightly reduces resilience within the finance function, and removes any capacity for making significant change or improvement without additional resource in the future.				
<b>Partners</b>				
None				
<b>Are there any specific equalities implications? Please provide a response for each protected characteristic/equalities consideration, even if the impact is neutral.</b>				
Protected characteristics and other equalities considerations	High (Positive / Negative)	Medium (Positive / Negative)	Low (Positive / Negative)	Neutral
Age				X
Disability				X
Ethnicity				X
Gender				X
Gender reassignment				X
Marriage and civil partnerships				X
Pregnancy and maternity				X
Religion and belief				X

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

Sexual orientation				X
Socio-economic inequality				X
Is a full EAA required?			N	

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

<b>Directorate</b>	Resources			
<b>Director</b>	IT & Digital			
<b>Service area</b>	Shared Technology Services (STS)			
<b>Cabinet Portfolio</b>	Finance and Strategy - Cllr de Ryk			
<b>Reference</b>	COR06 – IT & Digital STS			
<b>Saving title</b>	Shared Technology Services (STS) savings			
<b>Description of saving</b>  (including any specific elements or phasing to be considered)	JUMPSEC Limited	Cyber Security Review	Jumpsec Ltd for Cyber Security Review – This is the company that the London Borough of Lewisham use to scan and report on potential cyber threats to the council's IT network.	£33,000
	Computacenter (UK) Ltd	Mobile Iron Renewal	London Borough of Brent & London Borough of Lewisham to renew the contract for MobileIron which is the software used to secure corporate devices such as mobile phones.	£38,509
	One off		Relocation of Lewisham Homes Equipment from Greenwich to Brent Datacentre	£7,467
	One off		Relocation of Equipment from Maidstone to the Croydon Datacentre	£7,486
	Plus £88,000 proposed reduction from move to new O2 annual contract from Vodafone  All 2024/25 savings should be ongoing reduction to the Shared Technology Services (STS) budget.			
<b>Division budget</b>	<b>Gross £k</b>	<b>11,112,891</b>	<b>Net £k</b>	
<b>Service area budget</b>	<b>Gross £k</b>	<b>4,210,956</b>	<b>Net £k</b>	
<b>Saving proposed</b>	<b>2023/24 £k</b>	<b>0</b>	<b>2024/25 £k</b>	<b>174</b>
<b>Risks:</b>				
<b>Cost shunt to other service? Y/N</b>	No			
<b>Likelihood of making cut in full - %</b>	100%			

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

<b>Impact of making the saving</b>	A reduced cost to Lewisham Council for services and contracts provided by Shared Technology Services (STS).			
<b>Possible risk mitigation</b>	Not applicable			
<b>Other considerations:</b>				
<b>Member or Officer decision</b>	Officer decision			
<b>Redundancies</b>	Y/N	N	<b>Number of staff</b>	
<b>Public consultation</b>	Y/N	N	<b>Audience(s)</b>	
<b>Investment required</b> (value of saving shown above should be net of this investment)	Y/N	N	<b>Cost £k</b>	
	<b>In what:</b>			
<b>Contingent on other actions / decisions / cross service work</b>	None			
<b>Specific legal or statutory considerations</b>	None			

### 1. Equalities Screening Template

For each of the nine protected characteristics, identify whether the proposal has a high, medium, low or neutral impact on service users and whether this is a positive or negative impact.

#### Is this report easy to understand?

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

Identify whether the proposal has a high, medium, low or neutral impact on socio-economic inequality (e.g. low income, fuel poverty, food insecurity, digital inclusion etc) and whether this is a positive or negative impact.

Identify whether a full service equalities analysis assessment is required for this proposal based on this Equalities Analysis Toolkit. For advice on whether an EAA is required and how to assess service equalities impact please contact [policy@lewisham.gov.uk](mailto:policy@lewisham.gov.uk)

Impact & Outcomes				
<b>What is the likely impact of the proposed changes?</b>				
<b>Service Users</b>				
There will be no impact on service users as these savings are mainly gained from contractual cost reductions and equipment relocations within the data centres. This would all occur "behind the scenes". Service will continue seamlessly.				
<b>Staff</b>				
The only impact on staff will be those who use devices with council SIM cards (mobile phones, tablets, laptops etc.) who will need to change the sim cards to the new O2 ones. This is being co-ordinated, managed and communicated in a way that will cause minimum disruption to staff.				
<b>Other Council Services</b>				
There is not expected to be any impact on other Council Services.				
<b>Partners</b>				
None				
<b>Are there any specific equalities implications? Please provide a response for each protected characteristic/equalities consideration, even if the impact is neutral.</b>				
Protected characteristics and other equalities considerations	High (Positive / Negative)	Medium (Positive / Negative)	Low (Positive / Negative)	Neutral
Age				X

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**APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)**

<b>Disability</b>				X
<b>Ethnicity</b>				X
<b>Gender</b>				X
<b>Gender reassignment</b>				X
<b>Marriage and civil partnerships</b>				X
<b>Pregnancy and maternity</b>				X
<b>Religion and belief</b>				X
<b>Sexual orientation</b>				X
<b>Socio-economic inequality</b>				X
<b>is a full EAA required?</b>			N	

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

<b>Directorate</b>	Resources			
<b>Director</b>	IT & Digital			
<b>Service area</b>	Digital Services			
<b>Cabinet Portfolio</b>	Finance and Strategy - Cllr de Ryk			
<b>Reference</b>	COR07 – IT & Digital Applications			
<b>Saving title</b>	Digital savings			
<b>Description of saving</b> (including any specific elements or phasing to be considered)	<p>Support for the Microsoft Dynamics Customer Relationship Management (CRM) application which supports various services and new Housing Management system transfer from Xpedition Ltd to the in-house team, a saving of 24,835. As we have built up the capability and size of the Digital team, these capabilities can be managed in house. To be achieved from 24/25.</p> <p>Lewisham will cease to use East Peninsular Trading for recruitment and talent acquisition, a saving of 20,000. To be achieved from 23/24.</p>			
<b>Division budget</b>	<b>Gross £k</b>	<b>11,112,891</b>	<b>Net £k</b>	
<b>Service area budget</b>	<b>Gross £k</b>	<b>148,509</b>	<b>Net £k</b>	
<b>Saving proposed</b>	<b>2023/24 £k</b>	<b>20</b>	<b>2024/25 £k</b>	<b>45</b>
<b>Risks:</b>				
<b>Cost shunt to other service? Y/N</b>	No			
<b>Likelihood of making cut in full - %</b>	100%			
<b>Impact of making the saving</b>	Will no longer use talent acquisition so it may be more difficult to recruit.			
<b>Possible risk mitigation</b>	To fill vacant posts with permanent staff where possible or to use Matrix, the council's approved agency worker provider if necessary.			
<b>Other considerations:</b>				
<b>Member or Officer decision</b>	Officer decision			
<b>Redundancies</b>	<b>Y/N</b>	<b>N</b>	<b>Number of staff</b>	

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

<b>Public consultation</b>	<b>Y/N</b>	<b>N</b>	<b>Audience(s)</b>	
<b>Investment required</b> (value of saving shown above should be net of this investment)	<b>Y/N</b>	<b>N</b>	<b>Cost £k</b>	
	<b>In what:</b>			
<b>Contingent on other actions / decisions / cross service work</b>	None			
<b>Specific legal or statutory considerations</b>	None			

### 1. Equalities Screening Template

For each of the nine protected characteristics, identify whether the proposal has a high, medium, low or neutral impact on service users and whether this is a positive or negative impact.

Identify whether the proposal has a high, medium, low or neutral impact on socio-economic inequality (e.g. low income, fuel poverty, food insecurity, digital inclusion etc) and whether this is a positive or negative impact.

Identify whether a full service equalities analysis assessment is required for this proposal based on this Equalities Analysis Toolkit. For advice on whether an EAA is required and how to assess service equalities impact please contact [policy@lewisham.gov.uk](mailto:policy@lewisham.gov.uk)

<b>Impact &amp; Outcomes</b>
<b>What is the likely impact of the proposed changes?</b>
<b>Service Users</b>
No impact on service users as there should be a seamless transition from the support for MS Dynamics provided by Xpedition Ltd to the in-house team.
<b>Staff</b>

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

No impact on staff as they will still go through the same contact team.				
<b>Other Council Services</b>				
There is no envisaged impact on any other council services.				
<b>Partners</b>				
None				
<b>Are there any specific equalities implications? Please provide a response for each protected characteristic/equalities consideration, even if the impact is neutral.</b>				
Protected characteristics and other equalities considerations	High (Positive / Negative)	Medium (Positive / Negative)	Low (Positive / Negative)	Neutral
Age				X
Disability				X
Ethnicity				X
Gender				X
Gender reassignment				X
Marriage and civil partnerships				X
Pregnancy and maternity				X
Religion and belief				X
Sexual orientation				X
Socio-economic inequality				X
Is a full EAA required?			N	

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

<b>Directorate</b>	CYPS - CSC				
<b>Director</b>	Pinaki Ghoshal				
<b>Service area</b>	Children's Social Care				
<b>Cabinet Portfolio</b>	Children & Young People- Cllr Barnham				
<b>Reference</b>	CYP01 – CSC Housing Benefit Claims CYP02 – CSC Placement Payments Efficiency CYP03 – CSC Building Residential Homes CYP04 – CSC S17 & Placements				
<b>Cut title</b>	<ol style="list-style-type: none"> <li>1. Placements: Housing Benefit claims for all Staying Put</li> <li>2. Placements: Payments efficiency for placement providers</li> <li>3. Placements: Building Lewisham children's residential homes</li> <li>4. S17 &amp; Placements: Reduced spot purchasing of youth support</li> </ol>				
<b>Description of cut</b> (including any specific elements or phasing to be considered)	<b>Saving</b>	<b>2023/24</b>	<b>2024/25</b>	<b>2025/26</b>	<b>Total</b>
		<b>£'000</b>	<b>£'000</b>	<b>£'000</b>	<b>£'000</b>
	CSC 1	0	80	0	<b>80</b>
	CSC 2	20	180	0	<b>200</b>
	CSC 3	0	390	1,170	<b>1,560</b>
	CSC 4	200	500	500	<b>1,200</b>
	<b>TOTAL</b>	<b>220</b>	<b>1,150</b>	<b>1,670</b>	<b>3,040</b>
<b>Division budget</b>	<b>Gross £k</b>	57,222		<b>Net £k</b>	53,619
<b>Service area budget</b>	<b>Gross £k</b>	57,222		<b>Net £k</b>	53,619
<b>Cut proposed</b>	<b>2023/24 £k</b>	<b>£220</b>		<b>2024/25 £k</b>	<b>£1150</b>
				<b>2025/26 £k</b>	<b>£1670</b>
<b>Risks:</b>					
<b>Cost shunt to other service? Y/N</b>	No				
<b>Likelihood of making cut in full - %</b>	80%				
<b>Impact of making the cut</b>	CSC2: Positive impact – fewer overpayments and interest charges on late payments				

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

	CSC3 : Positive impact - less reliance on placement market, more cost control		
	CSC4 : Negative impact moderate - Could risk more young people entering care, if an alternative is not in place.		
Possible risk mitigation	CSC4 : Development of adolescent service to provide alternative 'in house' service		
Other considerations:			
Member or Officer decision	officer		
Redundancies	Y/N	N	Number of staff
Public consultation	Y/N	N	Audience(s)
Investment required (value of cut shown above should be net of this investment)	Y/N	Y	Cost £k TBC
	In what:	S3: Capital investment for repurposing identified buildings S4: Expansion of 'in house' service as alternative to commissioned resource	
Contingent on other actions / decisions / cross service work	S2: Requires changes to processes across CYP Services and Finance Payments Service S3: Business Case to be developed.		
Specific legal or statutory considerations			

## Equalities Screening Template

For each of the nine protected characteristics, identify whether the proposal has a high, medium, low or neutral impact on service users and whether this is a positive or negative impact.

Identify whether the proposal has a high, medium, low or neutral impact on socio-economic inequality (e.g. low income, fuel poverty, food insecurity, digital inclusion etc) and whether this is a positive or negative impact.

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

Identify whether a full service equalities analysis assessment is required for this proposal based on this Equalities Analysis Toolkit. For advice on whether an EAA is required and how to assess service equalities impact please contact [policy@lewisham.gov.uk](mailto:policy@lewisham.gov.uk)

<b>Impact &amp; Outcomes</b>
<b>What is the likely impact of the proposed changes?</b>
<b>Service Users</b>
CYP Directorate CSC Division Savings Proposals.  Saving: 1,2,4. – No impact  Saving 3 impact: Placing of children in care in an in-house Lewisham controlled provision as an alternative to commissioning placements, is likely to have a positive impact for those service users placed in the proposed units. Primarily, the provision will be local/in Borough and closer to the child's support network, family, school and community. Secondly as Lewisham will be in control of the provision, we will not be served short notice on placements (as frequently currently experienced). Both factors are likely to result in greater stability and continuity of care for some of our most vulnerable young people in care.
<b>Staff</b>
Saving: 1,2,4. – No impact  Saving 3 impact : Developing in house children's home provision will require staffing, depending on the model implemented and whether staffing will be permanent employees or a sub-contracted, internal staff may be suitable for an attracted to new posts, which may have an impact on existing staffing levels in the Children's Directorate.
<b>Other Council Services</b>
Saving: 1,2,4. – No impact  Saving 3 – too early at this stage to establish. As part of the Business Case and Programme Management of this proposal a fuller EAA will be completed where this will be explored in detail.
<b>Partners</b>
Saving: 1,2,4. – No impact

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

Saving 3 – too early at this stage to establish. As part of the Business Case and Programme Management of this proposal a fuller EAA will be completed where this will be explored in detail.

**Are there any specific equalities implications? Please provide a response for each protected characteristic/equalities consideration, even if the impact is neutral.**

Protected characteristics and other equalities considerations	High (Positive / Negative)	Medium (Positive / Negative)	Low (Positive / Negative)	Neutral
Age				X No specific impact
Disability				X No specific impact
Ethnicity		X For some CYP in care being able to remain in their community, not placed elsewhere in the country that have less cultural/racial diversity.		
Gender				X No specific impact
Gender reassignment				X No specific impact
Marriage and civil partnerships				X No specific impact
Pregnancy and maternity				X No specific impact
Religion and belief				X No specific impact
Sexual orientation				X No specific impact
Socio-economic inequality				X No specific impact
Is a full EAA required?			Y (See notes above)	

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

<b>Directorate</b>	CYP																															
<b>Director</b>	Angela Scattergood																															
<b>Service area</b>	Education – Access, Inclusion and Participation																															
<b>Cabinet Portfolio</b>	Cllr Barnham																															
<b>Reference</b>	<p>CYP05 – Primary Phase Commissioning Costs Management Action</p> <p>CYP06 – Participation Team Management Action</p> <p>CYP07 – Lewisham Challenge Management Action</p> <p>CYP08 – Outreach Inclusion Service Management Action Part (a)</p> <p>CYP08 – Outreach Inclusion Service Management Action Part (b)</p> <p>CYP08 – Outreach Inclusion Service Management Action Part (c)</p>																															
<b>Cut title</b>	<p><b>Edu 4. Primary phase Alternative Provision Commissioning costs – Management action</b></p> <p><b>Edu 5. Contribution from the Participation Team – Management action</b></p> <p><b>Edu 12. Lewisham Challenge – Management action</b></p> <p><b>Edu 14a. Outreach Inclusion Service – Management action</b></p>																															
<b>Description of cut</b> (including any specific elements or phasing to be considered)	<table border="1"> <thead> <tr> <th><b>Saving</b></th> <th><b>2023/24</b></th> <th><b>2024/25</b></th> <th><b>Total</b></th> </tr> <tr> <th></th> <th><b>£'000</b></th> <th><b>£'000</b></th> <th><b>£'000</b></th> </tr> </thead> <tbody> <tr> <td>Edu 4</td> <td>70</td> <td>30</td> <td><b>100</b></td> </tr> <tr> <td>Edu 5</td> <td>10</td> <td>0</td> <td><b>10</b></td> </tr> <tr> <td>Edu 12</td> <td>0</td> <td>40</td> <td><b>40</b></td> </tr> <tr> <td>Edu 14A</td> <td>70</td> <td>0</td> <td><b>70</b></td> </tr> <tr> <td><b>TOTAL</b></td> <td><b>150</b></td> <td><b>70</b></td> <td><b>220</b></td> </tr> </tbody> </table> <p><b>Edu 4. Primary phase Alternative Provision Commissioning costs – Management action</b></p>				<b>Saving</b>	<b>2023/24</b>	<b>2024/25</b>	<b>Total</b>		<b>£'000</b>	<b>£'000</b>	<b>£'000</b>	Edu 4	70	30	<b>100</b>	Edu 5	10	0	<b>10</b>	Edu 12	0	40	<b>40</b>	Edu 14A	70	0	<b>70</b>	<b>TOTAL</b>	<b>150</b>	<b>70</b>	<b>220</b>
<b>Saving</b>	<b>2023/24</b>	<b>2024/25</b>	<b>Total</b>																													
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Edu 12	0	40	<b>40</b>																													
Edu 14A	70	0	<b>70</b>																													
<b>TOTAL</b>	<b>150</b>	<b>70</b>	<b>220</b>																													

### Is this report easy to understand?

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We intend to commission fewer Primary Alternative Provision places from September 2023. This reduction will be five places at £20K so in an academic year £100K saving to the HNB. An in year saving of £70,000 in the 2022-23 budget and a total of £100K in 2024-25. This saving can be achieved as we have not seen the number of commissioned places go above 20 for some time, so there is no reduction in the offer to children.

**Edu 5. Contribution from the Participation Team – Management action**

We can offer a £10K from the Participation Team as an in-year saving from for European Social Fund (ESF) grant for post-16 tracking work.

**Edu 12. Lewisham Challenge – Management action**

Is a programme to raise aspirations amongst young people across all of the Lewisham sixth forms and colleges and to inform their decisions about HE and career opportunities. This is a programme unique to Lewisham but a non-statutory function. The target group is 16-18 and is well supported by external organisations (Higher Education, practitioners and employers).

The programme is long standing in Lewisham and is coordinated by an external consultant.

The proposal is to remove Council this funding for this coordination which is currently through the General Fund and for the Lewisham post-16 providers (sixth forms and colleges) to fund the programme moving forward. Recent legislation, including the Skills Post-16 Education Act 2022 and the Education (Careers Guidance in Schools) Act 2022 has placed further responsibility for careers guidance with schools and providers (rather than the LA). This has already been discussed with the providers who are confident in the programme and want to ensure its continuity; schools, Higher Education providers and Goldsmiths University have committed to funding.

**Edu 14a. Outreach Inclusion Service – Management action**

There are three elements to this overall savings proposal of £70k.

- a. We no longer base the Outreach Inclusion Service at New Woodlands School and staff are not based at Laurence House and work remotely. The rental of £18K is no longer required as an expenditure from the budget.
- b. Finance support has previously brokered with the New Woodlands School at an annual cost of £6K. This ceased from 31<sup>st</sup> July 2023. The Outreach Manager and internal Business Support are managing the finances and will continue to do so moving forward.

With changes to the management of the offer a vacant post is now being deleted from the establishment.

**Is this report easy to understand?**

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

<b>Division budget</b>	<b>Gross £k</b>	£170,538	<b>Net £k</b>	£15,176
<b>Service area budget</b>	<b>Gross £k</b>	£8,563	<b>Net £k</b>	£197
<b>Cut proposed</b>	<b>2023/24 £k</b>	<b>£150</b>	<b>2024/25 £k</b>	<b>£70</b>
<b>Risks:</b>				
<b>Cost shunt to other service? Y/N</b>	No			
<b>Likelihood of making cut in full - %</b>	All- 100%			
<b>Impact of making the cut</b>	Need to continue to monitor demand for alternative provision places.			
<b>Possible risk mitigation</b>	Review in September 2024 when management of the provision will move to Grinling Gibbons School.			
<b>Other considerations:</b>				
<b>Member or Officer decision</b>	Officer			
<b>Redundancies</b>	<b>N</b>		<b>Number of staff</b>	
<b>Public consultation</b>	<b>N</b>		<b>Audience(s)</b>	
<b>Investment required</b> (value of cut shown above should be net of this investment)	<b>N</b>		<b>Cost £k</b>	
	<b>In what:</b>			
<b>Contingent on other actions / decisions / cross service work</b>	n/a			
<b>Specific legal or statutory considerations</b>	n/a			
<b>What is the likely impact of the proposed changes?</b>				
<b>Service Users</b>				
<b>Primary phase Alternative Provision Commissioning costs – Management Action</b>				
No impact on services users. Based on three years of analysis less places are required to need. This will be sufficient to support the primary aged children in Lewisham schools.				
<b>Contribution from the Participation Team</b>				

### Is this report easy to understand?

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

N/A as it is external / additional funding we can contribute. However this is a one-off saving contribution.

### **Lewisham Challenge**

If we are unable to maintain external funding from key stakeholders we would need to consider the future of the programme.

### **Outreach Inclusion Service**

With one less member of staff supporting children in schools it may have an impact on reducing exclusions for Lewisham CYP. However, this work is part of the overall inclusion strategy and initiatives such as Mental Health Support Teams in Schools are being rolled out to more schools across the borough which is likely to offset any impact.

## **Staff**

### **Primary phase Alternative Provision Commissioning costs – Management Action**

N/A no impact on staffing.

### **Contribution from the Participation Team**

N/A no impact on staffing.

### **Lewisham Challenge**

N/A no impact on staffing.

### **4. Outreach Inclusion Service**

N/A no impact on staffing

## **Other Council Services**

### **Primary phase Alternative Provision Commissioning costs – Management Action**

N/A no impact on other Council services.

### **Contribution from the Participation Team**

N/A no impact on other Council services.

### **Lewisham Challenge**

N/A no impact on other Council services.

### **Outreach Inclusion Service**

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

No impact on other Council services				
<b>Partners</b>				
<b>Primary phase Alternative Provision Commissioning costs – Management Action</b>				
N/A				
<b>Contribution from the Participation Team</b>				
N/A				
<b>Lewisham Challenge</b>				
N/A				
<b>Outreach Inclusion Service</b>				
New Woodlands School were notified of these changes in Spring 2023, which were implemented in Summer 2023.				
<b>Are there any specific equalities implications?</b>				
Protected characteristics and other equalities considerations	High (Positive / Negative)	Medium (Positive / Negative)	Low (Positive / Negative)	Neutral
Age				X
Disability				X
Ethnicity				X
Gender				X
Gender reassignment				X
Marriage and civil partnerships				X
Pregnancy and maternity				X
Religion and belief				X
Sexual orientation				X
Socio-economic inequality				X
<b>Is a full EAA required?</b>			<b>N</b>	

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

<b>Directorate</b>	CYP			
<b>Director</b>	Angela Scattergood (Pinaki Ghoshal – Executive Director)			
<b>Service area</b>	Education Services - Integrated SEND Services for Children & Young People			
<b>Cabinet Portfolio</b>	Cllr Barnham			
<b>Reference</b>	CYP16 – SEND Travel Assistance CYP17 – Integrated SEND Service Grant Maximisation			
<b>Cut title</b>	Edu 8 Savings DBV Programme Implementation Grant Edu14 SEN Transport Mitigation work			
<b>Description of cut</b> (including any specific elements or phasing to be considered)	Integrated SEND Service (£100k) – Grant Maximisation (one off)  SEN Travel Assistance £150k			
<b>Division budget</b>	<b>Gross £k</b>	£170,538	<b>Net £k</b>	
<b>Service area budget</b>	<b>Gross £k</b>	£86,435	<b>Net £k</b>	
<b>Savings proposed</b>	<b>2023/24 £k</b>		<b>2024/25 £k</b>	250
<b>Risks:</b>				
<b>Cost shunt to other service? Y/N</b>	No			
<b>Likelihood of making cut in full - %</b>	80%			
<b>Impact of making the cut</b>	<p><b>Edu 8. DBV Programme -Grant Implementation-Mitigation work</b></p> <p>The LA is currently in wave 3 of the Delivering Better Value (DBV) programme and is highly likely to succeed with its bid/grant application for £1million to support continued mitigation work in reducing special educational needs and disabilities SEND spend from April 2024 onwards. The grant application is currently going through the assurer process from Newton Europe and Department for Education (DfE) and feedback so far has been positive.</p> <p>The LA has already demonstrated a strong track record in delivering mitigations such as creating additional local SEND places in special schools and resource bases as well as working with partners, such as local colleges on moderating high needs funding levels for individual learners with Education Health Care Plans (EHCPs).</p>			

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This work related to the DBV programme has required and continues to require protected project management and leadership time as well as capacity in the wider statutory SEND Service to undertake and deliver the ongoing mitigation work.

We suggest therefore that 8-10%, e.g. £80k-£100k of the grant when successful, is used in supporting the internal continued staffing cost for wider project management related to high needs mitigation work. Additionally, £32k has already been awarded by the DBV programme for data collection work; this could be added to the overall substitution. We would propose a £132k substitution to the posts funded by the general fund, including Head of Service for SEND post, SEND Data Monitoring Officer, CYP Finance Strategic Lead as a one-off saving.

**Edu14. SEN Travel Assistance for eligible learners: increase of personal travel assistance budgets by 5-8%.**

Currently we have 1,038 children and young people (CYP) who are eligible to be receiving SEND travel assistance, but only 62 of these CYP are accepting/receiving/are provided with a Direct Payment or Personal Travel Assistance Budget to meet their travel assistance needs to school/college and back home. The average unit cost of a Personal Travel Assistance Budget (PTAB) is £2,326.06 per learner per annum, compared to an average unit cost of £9,500 for a learner provided with SEN transport. A cost difference of £7,173.94 per learner per annum.

A PTAB Offer or Direct Payments offer can be completely flexible and does not need to be only for a set mileage and a set mileage cost. A PTAB offer would also give families more choice and control. In order to encourage more families to take up the offer of a PTAB, we want to ensure we can make a generous offer to individual families, who are eligible to receive SEND travel assistance for their child, which encourages and enables more choice and control for the family whilst also saving the Council significant amounts of money longer term (as a PTAB is always more cost efficient than providing direct 'transport'). Additionally, it would encourage a long overdue culture change related to expectations of a 'door to door' service and a more comprehensive approach to supporting independence for CYP where this is an appropriate and desirable outcome. A PTAB would be significantly cheaper than the Council needing to commission direct travel assistance in form of taxi or LPS. The parents/carers could commission their own support, may this be a neighbour or retired grandparent taking the eligible child to school, a family booking an

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

	<p>Uber for the child and siblings, a family paying for breakfast and/or after school club which allows a parent to also manage multiple school runs better for all siblings.</p> <p>We are proposing that a PTAB can be offered of up to 50% of the value of the average unit cost and this could provide a saving of at least £4,750 per learner accepting this offer.</p> <p>5% of learners would be 51 C&amp;YP x£4,750= £242,250 pa</p> <p>8% of learners would be 83 C&amp;YP x£4,750= £394,250 pa</p> <p>We have identified particular groups of learners whom we would want to approach in the first instance, such as our post 16 learners in local provisions in and out of borough. We also want to focus on young people going through a statutory phase transfer, moving on to secondary school.</p>		
<b>Possible risk mitigation</b>	<ol style="list-style-type: none"> <li>1. Capacity in the Integrated SEND Service- to be monitored</li> <li>2. Limited acceptance of families taking up the offer of a PTABs/Direct Payment options- Comms plan, support for individual families</li> </ol>		
<b>Other considerations:</b>			
<b>Member or Officer decision</b>	Officer		
<b>Redundancies</b>	Y/N	N	Number of staff
<b>Public consultation</b>	Y/N	N	Audience(s)
<b>Investment required</b> (value of cut shown above should be net of this investment)	Y/N	N	Cost £k
<b>In what:</b>			
<b>Contingent on other actions / decisions / cross service work</b>	N		
<b>Specific legal or statutory considerations</b>	N		
<b>What is the likely impact of the proposed changes?</b>			
<b>Service Users</b>			

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

Lewisham C&YP with SEND and their families will be provided with more choice and control. Families not wishing to take up the PTAB will be entitled to their standard transport offer. This PTAB does not impact on eligibility criteria.

### Staff

Increase in administrative work to ensure PTABS are set up and paid regularly.

### Other Council Services

Reduction in need for Lewisham Passenger Services will need to be monitored.

### Partners

### Are there any specific equalities implications?

Protected characteristics and other equalities considerations	High (Positive / Negative)	Medium (Positive / Negative)	Low (Positive / Negative)
Age			
Disability			
Ethnicity			
Gender			
Gender reassignment			
Marriage and civil partnerships			
Pregnancy and maternity			
Religion and belief			
Sexual orientation			
Socio-economic inequality		A positive impact could be that more families have more choice and control and the funds to make their own travel arrangements for their children.	

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

<b>Directorate</b>	Children & Young People				
<b>Director</b>	Angela Scattergood				
<b>Service area</b>	Education services				
<b>Cabinet Portfolio</b>	Cllr Barnham				
<b>Reference</b>	CYP18 – Grant Funding to Support Lewisham Learning CYP19 – Early Years Block Grant Maximisation CYP20 – Lewisham Virtual School Efficiencies (Edu 11- DUPLICATE)				
<b>Cut title</b>	Edu6 - Use of grant funding to provide administrative support within Lewisham Learning.  Edu7 – Early Years Funding Block -Grant Maximisation  Edu10- Efficiency savings across Lewisham Virtual School  Edu11 - Overspend reduction measure – Time off for trade union activities (TOFTUA) and Disclosure and Barring Service (DBS) charges				
<b>Description of cut</b> (including any specific elements or phasing to be considered)	<b>Saving</b>	<b>2023/24</b>	<b>2024/25</b>	<b>2025/26</b>	<b>Total</b>
		<b>£'000</b>	<b>£'000</b>	<b>£'000</b>	<b>£'000</b>
	Edu 6	15	0	0	<b>15</b>
	Edu 7	0	35	100	<b>135</b>
	Edu 10	61	0	0	<b>61</b>
	Edu 11	15	0	0	<b>15</b>
	<b>TOTAL</b>	<b>91</b>	<b>35</b>	<b>100</b>	<b>226</b>
	<b>Edu 6 - Use of grant funding to provide administrative support within Lewisham Learning.</b>  Saving relates to cost reduction £15k  Since the beginning of the academic year the Lewisham Learning Project Manager post has been vacant. In parallel with this Lewisham has been successful in securing a grant from the Violence Reduction Unit for work				

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supporting primary schools. This funding includes an allocation to provide administrative support for the project. The intention is therefore to recruit to a full-time post, but however part fund this through the grant allocation. It is estimated that this will save £15k within the current financial year.

**Edu 7. Early Years Funding Block -Grant Maximisation**

The Early Years Block enables LA to holdback 5% of the total 3 and 4 year old funding. This proposal suggests that a total of £135k is put forward as a grant maximisation saving. This would be phased £35k in 2024/25 and further £100k in 2025/26.

The Government has agreed to an extension of the Early Years entitlement offer including free childcare for children from the age of 9 months. The implementation of the new offer will take time to embed, for this reason the saving is phased in as stated. To support this extension additional grant funding has also been made available to the LA. As the number of children attending pre-school provision increase as more families access free provision, the income the LA will also increase.

**Edu 10. Efficiency savings across Lewisham Virtual School**

This saving relates to review and of contracts and service level agreements across the activities of the Virtual School to ensure best use of funding. There will be no reduction to direct statutory support for children which is mainly funded through ring-fenced Pupil Premium funding. The Pupil Premium has specific grant conditions which we cannot deviate from.

The service funding of £2,043k for 23/24:

DSG - High Needs	948,119
Pupil Premium - CLA	867,790
	100,000
Virtual School Extended Duties	
Extension of the Role of Virtual School Heads	47,972
Pupil Premium Plus (PP+) post-16	78,200

**Edu 11 - Overspend reduction measure, TOFTUA and DBS) Saving relates to cost reduction £15k.**

This saving relates to a Lewisham schools forum decision (October 2023, as part of its de-delegation arrangements) to a full reimbursement model for schools for trade union cover, ensuring that there is equity across schools in funding this activity and in reimbursement for those schools who

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

	<p>have elected local union representatives, for their actual costs. Under the current arrangements, the Local Authority and specific schools (i.e. those with elected reps.) and are subsidising TOFTUA arrangements across the borough. It based on a historic formula, rather than activity and the full cost of covering these members of staff.</p> <p>Lewisham Council and schools forum remains committed to supporting the role that local trade unions play in maintaining good employee relations, communication and representing individual employees. This proposal does not make any changes to level of activity.</p> <p>The budget in question relates mainly to the teacher trade unions, including NEU, which also welcomes all school-based staff. Facilities time for the main recognised support staff unions (UNISON, GMB, UNITE) is funded by the corporate Council.</p> <p>In addition, future charging to schools to use the DBS service will include the reimbursement of administrative the costs.</p>			
<b>Division budget</b>	<b>Gross £k</b>	£170,538k	<b>Net £k</b>	£15,176k
<b>Service area budget</b>	<b>Gross £k</b>	£4,319k	<b>Net £k</b>	£197k
<b>Savings proposed</b>	<b>2023/24 £k</b>	<b>£91k</b>	<b>2024/25 £k</b>	<b>£35k</b>
			<b>2025/26 £k</b>	<b>£100k</b>
<b>Risks:</b>				
<b>Cost shunt to other service? Y/N</b>	No			
<b>Likelihood of making cut in full - %</b>	6 - 100% 7 – 70% 10 - 95% 11- 100%			
<b>Impact of making the cut</b>	6 - No impact given the additional grant funding 7 - One key risk is that as the new entitlement offer is being rolled out, there is a possibility that the 5% holdback that LA's are allowed to centrally managed could be reduced to 3%- DfE communication will be monitored 10 – The Virtual School service is demand led and a statutory requirement on LA's 11 – Education service will no longer subsidise shortfall in costs.			
<b>Possible risk mitigation</b>	6 - N/A 7 - It is unclear exactly what the government's intentions are here. A reduction in the percentage funding that we hold back may however be			

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

	offset by a large increase in the number of children receiving free early years childcare.		
	10 - There will be no reduction in direct statutory support to children		
	11 – N/A		
<b>Other considerations:</b>			
<b>Member or Officer decision</b>	Officer Schools Forum where relevant		
<b>Redundancies</b>	<b>Y/N</b>	<b>N</b>	<b>Number of staff</b>
<b>Public consultation</b>	<b>Y/N</b>	<b>N</b>	<b>Audience(s)</b>
<b>Investment required</b> (value of cut shown above should be net of this investment)	<b>Y/N</b>	<b>N</b>	<b>Cost £k</b>
	<b>In what:</b>		
<b>Contingent on other actions / decisions / cross service work</b>	N		
<b>Specific legal or statutory considerations</b>	6 – N 7 – Grant conditions will be met. 10 - LA are required to provide Virtual School services as part of their statutory requirements. Grant conditions will be met. 11 - N		
<b>Impact &amp; Outcomes</b>			
<b>What is the likely impact of the proposed changes?</b>			
<b>Service Users</b>			
<b>Use of grant funding to provide administrative support within Lewisham Learning.</b>			
There is no anticipated impact on service users. The support to schools and delivery of services will not be affected.			
<b>Early Years Funding Block -Grant Maximisation</b>			
There will be no impact on service users.			

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

### Efficiency savings across Lewisham Virtual School

There will be no reduction in direct statutory support to children

### Overspend reduction measure – TOFTUA and DBS charges

None

### Staff

### Use of grant funding to provide administrative support within Lewisham Learning.

There is no anticipated impact on staff. The recruitment process will be in line with Lewisham guidance and the post will be advertised externally.

### Early Years Funding Block -Grant Maximisation

There will be no impact on staff.

### Efficiency savings across Lewisham Virtual School

None envisaged

### Overspend reduction measure – TOFTUA and DBS charges

None

### Other Council Services

### Use of grant funding to provide administrative support within Lewisham Learning.

There is no anticipated impact on other council services.

### Early Years Funding Block -Grant Maximisation

There is no impact on other council services.

### Efficiency savings across Lewisham Virtual School

None envisaged

### Overspend reduction measure – TOFTUA and DBS charges

None

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

Partners				
<p><b>Use of grant funding to provide administrative support within Lewisham Learning.</b></p> <p>There is no anticipated impact on partners.</p>				
<p><b>Early Years Funding Block -Grant Maximisation</b></p> <p>There is no impact on partners.</p>				
<p><b>Efficiency savings across Lewisham Virtual School</b></p> <p>None envisaged</p>				
<p><b>Overspend reduction measure – TOFTUA and DBS charges</b></p> <p>Arrangements for school funding of the activity has been agreed by schools forum</p>				
Are there any specific equalities implications? <u>Please provide a response for each protected characteristic/equalities consideration, even if the impact is neutral.</u>				
Protected characteristics and other equalities considerations	High (Positive / Negative)	Medium (Positive / Negative)	Low (Positive / Negative)	Neutral
Age				○
Disability				○
Ethnicity				○
Gender				○
Gender reassignment				○
Marriage and civil partnerships				○
Pregnancy and maternity				○
Religion and belief				○
Sexual orientation				○

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Socio-economic inequality				0
Is a full EAA required?			NO	

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

<b>Directorate</b>	Children & Young People			
<b>Director</b>	Angela Scattergood			
<b>Service area</b>	Education Services			
<b>Cabinet Portfolio</b>	Cllr Barnham			
<b>Reference</b>	CYP09 – Short Breaks Review			
<b>Cut title</b>	Edu 9. Savings from Short Breaks Review- Targeted & Specialist Short Breaks including CHC cases.			
<b>Description of cut</b> (including any specific elements or phasing to be considered)	<p><b>Targeted Short Breaks:</b></p> <p>We are currently reviewing the criteria for targeted short breaks as they currently focus on diagnosis and Disability Living Allowance which give a generic need but does not factor elements such as severity of need and other support available to the child.</p> <p><b>Specialist Short Breaks:</b></p> <p>Over time the spot purchasing of support has increased, especially related to carer support and domiciliary care. We are proposing to review commissioning arrangements, reduce the level of support spot-purchased (which is typically more expensive than using an agreed contract) and will also explore the opportunity of increasing our in-house offer if we can evidence better value for money.</p> <p><b>Contributions to Continuing Health Care (CHC awarded by Health) Packages:</b></p> <p>We are currently contributing over £1million per annum for children who are eligible to receive continuing health care packages via the ICB. We are proposing a review of these historical agreements as well as a policy review as we are of the view that it should not be that social care has to subsidise care packages for children with often acute nursing needs.</p> <p>The estimate of the savings achieved is £150k. This may increase once further work has been done in this area.</p>			
<b>Division budget</b>	<b>Gross £k</b>	£170,538	<b>Net £k</b>	£15,176
<b>Service area budget</b>	<b>Gross £k</b>	£86,435	<b>Net £k</b>	£14,172
<b>Savings proposed</b>	<b>2023/24 £k</b>	0	<b>2024/25 £k</b>	<b>150</b>

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

			2025/26 £k	£0
<b>Risks:</b>				
<b>Cost shunt to other service? Y/N</b>		No		
<b>Likelihood of making cut in full - %</b>		70%		
<b>Impact of making the cut</b>	<p>Reluctance of ICB/CHC to cover costs of care packages for health reasons.</p> <p>Changes to Targeted Short Breaks may lead to some children receiving increased packages of support and others receiving less. Families in the latter group are unlikely to welcome such a reduction.</p>			
<b>Possible risk mitigation</b>	<p>In relation to changes in criteria for targeted support we will need to communicate openly with families about the changes proposed and why. Some initial exploration has identified discrepancies in the levels of support that children receive. We will ensure effective consultation and communication with families.</p> <p>In relation to the ICB health contribution this will need to involve on-going negotiation with our Health partners</p>			
<b>Other considerations:</b>				
<b>Member or Officer decision</b>	Officer			
<b>Redundancies</b>	<b>Y/N</b>	N	<b>Number of staff</b>	
<b>Public consultation</b>	<b>Y/N</b>	N	<b>Audience(s)</b>	
<b>Investment required</b> (value of cut shown above should be net of this investment)	<b>Y/N</b>	Y	<b>Cost £k</b>	N
	<b>In what:</b>	Not known at present – development of increased in-house provision is likely to involve some investment if this is deemed to be the best way forward. This would be met through reduced spend on contracted provision.		
<b>Contingent on other actions / decisions / cross service work</b>	N			
<b>Specific legal or statutory considerations</b>	N			
<b>What is the likely impact of the proposed changes?</b>				
<b>Service Users</b>				

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

Some CYP and their families may receive a reduced level of service, whilst others may receive more and/or additional children and young people may become eligible for targeted short breaks. A full assessment of impact will be carried out as part of the review.				
<b>Staff</b>				
No impact on staff.				
<b>Other Council Services</b>				
No impact				
<b>Partners</b>				
ICB- negotiations at senior level to agree way forward				
<b>Are there any specific equalities implications?</b>				
Protected characteristics and other equalities considerations	High (Positive / Negative)	Medium (Positive / Negative)	Low (Positive / Negative)	Neutral
Age				X
Disability		Potential negative or positive impact on some C&YP with SEND in service level changes- will be assessed as part of EAA of the review		
Ethnicity				X
Gender				X
Gender reassignment				X
Marriage and civil partnerships				X
Pregnancy and maternity				X
Religion and belief				X
Sexual orientation				X
Socio-economic inequality			Potential negative or positive impact	

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

			on some C&YP with SEND in service level changes- will be assessed as part of EAA of the review	
<b>Is a full EAA required?</b>			Y (will be undertaken as part of review)	

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

	Children & Young People
	Sara Rahman
	Families, Quality & Commissioning
	Cllr Barnham
	CYP11 - FQC Reduction in Business Support CYP12 – FQC Grant Maximisation CYP13 – FQC Sale of Capital Asset CYP14 – FQC Children’s Centre Revenue CYP15 – FQC Staffing Costs Reduction
	<p>1. <u>Reduction in Business Support to FQC.</u> Following changes in responsibilities across both Children’s Social Care and Families Quality &amp; Commissioning changes in business support (still largely delivered by staff within CSC are required. It is expected that this can lead to efficiencies given changes in ways of working and staffing restructures more widely within FQC. In addition grant funding will be used for some of the administrative support where appropriate).</p> <p>2. <u>Grant maximisation (inc Family Hubs).</u> Increasingly FQC have been in receipt of a range of different grants, including the Family Hub grants and Enhance grant from the DfE. Other smaller grants from the VRU have also been gained. Some use of grant funding for some activity previously funded through the General Fund is possible.</p> <p>3. <u>Sale of a capital asset.</u> The directorate has continued responsibility for a building in Honor Oak (Honor Oak Depot), which historically was used to support Children’s Centre delivery. This site has not been delivery a Children’s Centre offer for some time and is currently used for accommodating a small service which could be delivered elsewhere. The building is within the Honor Oak estate (and Opposite the Honor Oak Youth Centre which is about to become a Family Hub, supported by additional capital investment. The site is valued at £850k and is no longer required. Given its location it would be suitable to be redeveloped for social housing (HRA funding) or temporary accommodation. Further discussions will be required with colleagues across the Council to consider how the site might best be used to support residents. No decision about this has yet been made.</p> <p>4. <u>Children’s Centre Revenue saving.</u> With the changes to service delivery (from Children’s Centres to Family Hubs) and improved multi-agency working, there is expected to be a permanent saving to Children’s Centre running costs. As the Family Hubs programme develops there will be some overlaps with the current</p>

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

	<p>Children's Centre delivery with opportunities for efficiencies. In the longer term, new Family Hubs in sites that are not previously Children's Centres (2 or 3 depending on a final decision for Kaleidoscope) will provide an opportunity to ensure more integrated service delivery in hubs, supported by a lower level of support in spokes leading to less activity in Children's Centres that are not Family Hubs.</p> <p>5. <u>Reduction in staffing costs</u> The division has already been managing with a number of vacant posts following previous restructures. It is projected that this will deliver an additional saving of £350k over and above previous projections.</p>																																						
	<table border="1"> <thead> <tr> <th>Saving</th> <th>2023/24</th> <th>2024/25</th> <th>2025/26</th> <th>Total</th> </tr> </thead> <tbody> <tr> <td>FQC 1</td> <td>0</td> <td>100</td> <td>0</td> <td><b>£100</b></td> </tr> <tr> <td>FQC 2</td> <td>150</td> <td>0</td> <td>0</td> <td><b>£150</b></td> </tr> <tr> <td>FQC 3*</td> <td>0</td> <td>850</td> <td>0</td> <td><b>£850</b></td> </tr> <tr> <td>FQC 4</td> <td>0</td> <td>50</td> <td>0</td> <td><b>£50</b></td> </tr> <tr> <td>FQC 5*</td> <td>350</td> <td>0</td> <td>0</td> <td><b>£350</b></td> </tr> <tr> <td><b>TOTAL</b></td> <td><b>500</b></td> <td><b>1000</b></td> <td><b>0</b></td> <td><b>£1500</b></td> </tr> </tbody> </table> <p><b>*Denotes one off savings</b></p>	Saving	2023/24	2024/25	2025/26	Total	FQC 1	0	100	0	<b>£100</b>	FQC 2	150	0	0	<b>£150</b>	FQC 3*	0	850	0	<b>£850</b>	FQC 4	0	50	0	<b>£50</b>	FQC 5*	350	0	0	<b>£350</b>	<b>TOTAL</b>	<b>500</b>	<b>1000</b>	<b>0</b>	<b>£1500</b>			
Saving	2023/24	2024/25	2025/26	Total																																			
FQC 1	0	100	0	<b>£100</b>																																			
FQC 2	150	0	0	<b>£150</b>																																			
FQC 3*	0	850	0	<b>£850</b>																																			
FQC 4	0	50	0	<b>£50</b>																																			
FQC 5*	350	0	0	<b>£350</b>																																			
<b>TOTAL</b>	<b>500</b>	<b>1000</b>	<b>0</b>	<b>£1500</b>																																			
	<b>Gross £k</b>	15,141	<b>Net £k</b>	8,328																																			
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			<b>2025/26 £k</b>	<b>0</b>																																			
<b>Risks:</b>																																							
<b>Cost shunt to other service? Y/N</b>		No																																					
<b>Likelihood of making cut in full - %</b>		70%																																					
	<p><u>FQC 1</u>: Potential impact on business support capacity – low risk</p> <p><u>FQC 3</u>: This assumes the sale of a capital asset as a one off cost saving to the General Fund. As noted above this will require further work to support delivery of the saving.</p> <p><u>FQC 2 &amp; 4</u>: Careful management is required here as we move away from the previous Children's Centre delivery model to the new Family Hub model. This is intended to improve outcome for children and families as it involves greater multi-agency working and a 'one stop shop' for families seeking support.</p>																																						
	See above																																						

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

Other considerations:				
	Most are Officer BUT Member decision re capital assets			
	Y/N	N	Number of staff	
	Y/N	N	Audience(s)	
	Y/N	Y	Cost £k	N
	In what:	Investment already identified to support the Family Hub programme – approximately £4.5M over three years, grant funded		

## Equalities Screening Template

For each of the nine protected characteristics, identify whether the proposal has a high, medium, low or neutral impact on service users and whether this is a positive or negative impact.

Identify whether the proposal has a high, medium, low or neutral impact on socio-economic inequality (e.g. low income, fuel poverty, food insecurity, digital inclusion etc) and whether this is a positive or negative impact.

Identify whether a full service equalities analysis assessment is required for this proposal based on this Equalities Analysis Toolkit. For advice on whether an EAA is required and how to assess service equalities impact please contact [policy@lewisham.gov.uk](mailto:policy@lewisham.gov.uk)

### Impact & Outcomes

What is the likely impact of the proposed changes?

#### Service Users

Include evidence to support anticipated impacts, both positive and negative.

Savings proposal 1 (FQC1): Positive Impact– Changes in business support responsibilities across Children’s Social Care and Families, Quality and Commissioning are ongoing, which

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

will ensure a consistent level of business support across the division. Saving efficiencies within FQC due to changes to ways of working will not impact service users negatively.

Savings proposal 2 (FQC 2): Neutral Impact – FQC are in receipt of a range of grants. Service users will experience no change in service delivery resulting in the maximisation of grant fundings and the reduced need for General Fund.

Savings proposal 3 (FQC 3): Neutral Impact – Discussions are at an early stage regarding plans for the disposal/sale of the site. Whilst no decision has been made yet, plans to relocate the small service, currently based on site, will ensure delivery from another location and therefore will have no negative impact on service users.

Savings proposal 4 (FQC 4): Positive Impact – plans to redesign service delivery from Children and Family Centres are currently underway. These changes will create a seamless and consistent offer of support that will further prevent inequality of access to service provision. The overall impact for service users will be positive with anticipated increase in access and more targeted provision to ensure we reach and engage more families from communities not currently accessing existing provision.

Savings proposal 5 (FQC 5): Neutral Impact – The division will continue to maintain existing vacancies. Service users will not be directly impacted as there will be no changes to service delivery.

### Staff

Include evidence to support anticipated impacts, both positive and negative.

Savings proposal 1. (FQC1): Positive Impact – Changes in business support responsibilities across Children’s Social Care and Families, Quality and Commissioning are ongoing, which will ensure a consistent level of business support across the division, create efficiencies and identify gaps and/or duplication in ways of working. Efficiencies within FQC business support function due to changes to ways of working will not impact staff negatively and there are no redundancies expected.

Savings proposal 2 (FQC 2): Neutral Impact – FQC are in receipt of a range of grants. Staff will experience no change in service delivery or ways of working resulting in the maximisation of grant fundings and the reduced need for General Fund.

Savings proposal 3 (FQC 3): Neutral Impact – Discussions are at an early stage regarding plans for the disposal/sale of the site. Whilst no decision has been made yet, plans to relocate

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

the small service, currently based on site, will ensure delivery from another location and therefore will have no negative impact on staff.

Savings proposal 4 (FQC 4): Neutral Impact – plans to redesign service delivery from Children and Family Centres are currently underway. These changes will create a seamless and consistent offer of support that will further prevent inequality of access to service provision. The redesign will have no direct impact on council staff.

Savings proposal 5 (FQC 5): Neutral Impact – The division will continue to maintain existing vacancies. Service users will not be directly impacted as there will be no changes to service delivery.

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

<b>Directorate</b>	Housing Services			
<b>Director</b>	Fen Beckman			
<b>Service area</b>	Housing Needs and Refugee Services			
<b>Cabinet Portfolio</b>	Housing Management and Homelessness- Cllr Cooper			
<b>Reference</b>	HSG02 – Capitalisation of Housing Casework Officer to HRA			
<b>Saving title</b>	Capitalise salary of the Housing Casework Officer to the HRA			
<b>Description of saving</b> (including any specific elements or phasing to be considered)	This proposal is to capitalise the salary cost of the Housing Casework Officer post which is currently in the Housing Needs and Refugee Services/Housing Strategy Division establishment but will be moving to the new Directorate Casework Team in the Residents Engagement and Services Division from 1 <sup>st</sup> November 2023. The post will be incorporated into the former Lewisham House Customer Relations Team and the remit for the role will extend to include housing management casework.			
<b>Division budget</b>	<b>Gross £</b>	54,015,896	<b>Net £k</b>	8,383,337
<b>Service area budget</b>	<b>Gross £</b>	51,577,572	<b>Net £k</b>	9,276,448
<b>Saving proposed</b>	<b>2023/24 £k</b>	<b>21</b>	<b>2024/25 £k</b>	<b>50</b>
<b>Risks:</b>				
<b>Cost shunt to other service? Y/N</b>	No			
<b>Likelihood of making cut in full - %</b>	100%			
<b>Impact of making the saving</b>	There will be no impact to service users as this is essentially a change in the funding stream for the post.			
<b>Possible risk mitigation</b>	Not Applicable			
<b>Other considerations:</b>				
<b>Member or Officer decision</b>	Officer			
<b>Redundancies</b>	<b>Y/N</b>	No	<b>Number of staff</b>	Not Applicable
<b>Public consultation</b>	<b>Y/N</b>	Not Applicable	<b>Audience(s)</b>	Not Applicable
<b>Investment required</b> (value of saving shown)	<b>Y/N</b>	Not Applicable	<b>Cost £k</b>	Not Applicable
	<b>In what:</b>	Not Applicable		

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

above should be net of this investment)		
<b>Contingent on other actions / decisions / cross service work</b>	Not Applicable	
<b>Specific legal or statutory considerations</b>	Not Applicable	

<b>What is the likely impact of the proposed changes?</b>				
<b>Service Users</b>				
There is no impact to service users				
<b>Staff</b>				
There is no impact to staff as this proposals just changes the funding stream from which the post is paid.				
<b>Other Council Services</b>				
There is no impact to other Council services.				
<b>Partners</b>				
There is no impact to our partner organisations.				
<b>Are there any specific equalities implications? Please provide a response for each protected characteristic/equalities consideration, even if the impact is neutral.</b>				
<b>Protected characteristics and other equalities considerations</b>	<b>High (Positive / Negative)</b>	<b>Medium (Positive / Negative)</b>	<b>Low (Positive / Negative)</b>	<b>Neutral</b>
Age				X
Disability				X
Ethnicity				X
Gender				X

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Gender reassignment				X
Marriage and civil partnerships				X
Pregnancy and maternity				X
Religion and belief				X
Sexual orientation				X
Socio-economic inequality				X
Is a full EAA required?			N	

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

<b>Directorate</b>	Housing Services			
<b>Director</b>	Fen Beckman			
<b>Service area</b>	Housing Needs and Refugee Services			
<b>Cabinet Portfolio</b>	Housing Management and Homelessness- Cllr Cooper			
<b>Reference</b>	HSG03 – TA Reduction Project			
<b>Saving title</b>	Increase savings from the Temporary Accommodation Reduction Project			
<b>Description of saving</b> (including any specific elements or phasing to be considered)	<p>This would be an additional savings target to further reduce spend on temporary accommodation, building on the actions already being taken through the Temporary Accommodation Reduction Plan. The focus will be on procuring temporary accommodation that is an alternative to hotels/nightly paid accommodation that leads to a reduction in the limitation recharge, extracting more savings from the existing workstreams and identifying any new areas of activity.</p> <p>The TA Reduction Project is currently due to deliver £1m over the next three years, with £200k in 23/24, £300k in 24/25 and £500k in 25/26. This proposal is to increase the savings target for 2024/25 to £500k, which is an additional £200k.</p>			
<b>Division budget</b>	<b>Gross £k</b>	54,015,896	<b>Net £k</b>	8,383,337
<b>Service area budget</b>	<b>Gross £k</b>	51,577,572	<b>Net £k</b>	9,276,448
<b>Saving proposed</b>	<b>2023/24 £k</b>	<b>0</b>	<b>2024/25 £k</b>	<b>200</b>
<b>Risks:</b>				
<b>Cost shunt to other service? N</b>	No			
<b>Likelihood of making cut in full - %</b>	100%			
<b>Impact of making the saving</b>	Work is already underway to achieve the existing savings and from this work we believe there is potential to achieve more.			
<b>Possible risk mitigation</b>				
<b>Other considerations:</b>				
<b>Member or Officer decision</b>	Officer			
<b>Redundancies</b>	<b>Y/N</b>	N	<b>Number of staff</b>	Not Applicable

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<b>Public consultation</b>	<b>Y/N</b>	N	<b>Audience(s)</b>	Not Applicable
<b>Investment required</b> (value of saving shown above should be net of this investment)	<b>Y/N</b>	N	<b>Cost £k</b>	Not Applicable
	<b>In what:</b>	Not applicable		
<b>Contingent on other actions / decisions / cross service work</b>	Some of the additional savings to be realised is dependent on acquisition programme delivering new properties for TA.			
<b>Specific legal or statutory considerations</b>	Homelessness duties apply – cannot refuse TA where there is a statutory obligation to provide it. However, there is some flexibility in location and type of accommodation.			

<b>What is the likely impact of the proposed changes?</b>
<b>Service Users</b>
This proposal is not expected to impact on service users as the savings will be achieved from implementing more efficient processes within the temporary accommodation service.
<b>Staff</b>
This proposal is not expected to impact directly on staff.
<b>Other Council Services</b>
There is no impact to other Council services.
<b>Partners</b>
There is no impact to our partner organisations.

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Are there any specific equalities implications? Please provide a response for each protected characteristic/equalities consideration, even if the impact is neutral.				
Protected characteristics and other equalities considerations	High (Positive / Negative)	Medium (Positive / Negative)	Low (Positive / Negative)	Neutral
Age				X
Disability				X
Ethnicity				X
Gender				X
Gender reassignment				X
Marriage and civil partnerships				X
Pregnancy and maternity				X
Religion and belief				X
Sexual orientation				X
Socio-economic inequality				X
Is a full EAA required?			N	

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

<b>Directorate</b>	Housing Services
<b>Director</b>	Fen Beckman
<b>Service area</b>	Housing Needs and Refugee Services
<b>Cabinet Portfolio</b>	Housing Management and Homelessness- Cllr Cooper
<b>Reference</b>	HSG04 – Reduction of Property Negotiator Posts
<b>Saving title</b>	Reduction of two Property Negotiator posts
<b>Description of saving</b> (including any specific elements or phasing to be considered)	<p>The Accommodation Supply establishment has four Property Negotiator posts all funded from the General Fund. This proposal is to reduce the General Fund allocation by the equivalent of two posts in 2024/25. Unless alternative funding, (eg Home Office), is secured this will lead to a reduction of two posts in the team.</p> <p>The Accommodation Supply team is responsible for procuring accommodation to meet the needs of services across the Council; this includes temporary accommodation as well as accommodation for discharge of duty into the PRS. The team includes the Accommodation Supply Manager, one Technical Surveyor who works primarily on repairs and maintenance of Private Sector Leased (PSL) properties due to be handed back to landlords as well as working with landlords and their agents to ensure that the standard of leased accommodation is high. The team also includes four Property Negotiators who are primarily responsible for sourcing accommodation to ensure that the numbers of people in TA reduces, and supply of accommodation meets the demands on the Housing Needs service and other Council services.</p> <p>There are just under 2800 households in temporary accommodation on 23<sup>rd</sup> October 2023 and the homelessness service continues to face increasing demand for support from residents in housing need. There is however a significant shortage of properties in the private rented sector for our officers to procure for use as TA or to discharge our homelessness duties.</p> <p>This shortage has been a result of landlords exiting the rental market due to a number of changes to the tax system which has increased the amount of tax payable on both the purchase of a buy-to-let property and its rental income, this has then been compounded by the rapid rise in interest rates earlier this year ultimately reducing viability for landlords. The result has been a significant reduction in properties available for officers to procure. During the first six months of this year, we procured a total 154 properties for all our housing duties including prevention, discharge of duty, rough sleepers, refugee resettlement and ex-offender accommodation etc. In 21/22 we had procured 245 in the same period, this is about 40% reduction in activity. Below are the total number of <u>new</u> properties (PMAs and PSLs) procured for temporary accommodation by the team between April and September of the following years</p>

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	<ul style="list-style-type: none"> <li>• 21/22 - 60</li> <li>• 22/23 - 47</li> <li>• 23/24 -27</li> </ul> <p>The reduction of two Property Negotiator posts is a reflection of the very challenging environment that the service is operating in and as there are no properties for staff to procure this proposal seeks to reduce the team by half.</p>			
<b>Division budget</b>	<b>Gross £</b>	54,015,896	<b>Net £</b>	8,383,337M
<b>Service area budget</b>	<b>Gross £</b>	51,577,572	<b>Net £</b>	9,276,448
<b>Saving proposed</b>	<b>2023/24 £k</b>	<b>0</b>	<b>2024/25 £k</b>	<b>113</b>
<b>Risks:</b>				
<b>Cost shunt to other service? Y/N</b>	No			
<b>Likelihood of making cut in full - %</b>	100%			
<b>Impact of making the saving</b>	The impact of making this saving is a reduction in the number of officers searching for properties for our families in housing need and a reduction in the overall capacity of the service to work with existing landlords and clients.			
<b>Possible risk mitigation</b>	The Accommodation Supply team will continue to retain two Property Negotiator posts. The remaining officers will work to secure the few properties that come onto the market as well as to negotiate with our existing landlords to keep our families in their properties and reduce the number of properties due to be handed back.			
<b>Other considerations:</b>				
<b>Member or Officer decision</b>	Officer			
<b>Redundancies</b>	<b>Y/N</b>	<b>Yes (Possibly)</b>	<b>Number of staff</b>	2
<b>Public consultation</b>	<b>Y/N</b>	No	<b>Audience(s)</b>	Not Applicable
<b>Investment required</b> (value of saving shown above should be net of this investment)	<b>Y/N</b>	No	<b>Cost £k</b>	Not Applicable
	<b>In what:</b>	Not Applicable		
<b>Contingent on other actions / decisions / cross service work</b>	Not Applicable			
<b>Specific legal or statutory considerations</b>	This proposal would need to be implemented using the Council's Management of Change policy. There is no savings in 23/24 due to change management processes and timescales.			

**What is the likely impact of the proposed changes?**

**Service Users**

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

There is low impact to service users, ie our homeless households, as the number of new PRS properties that the team have been procuring has been very few and significantly below original targets set out in the Accommodation Supply Strategy. The remaining officers in the team will continue to access available supply of property in the market for our homeless households.

### Staff

There will be an impact to staff as two posts are proposed to be deleted from the staffing establishment. Any vacancies that exist at the time of implementation will be included as part of the process. This will be done through the Council's Change Management process.

### Other Council Services

There is no impact to other Council services

### Partners

There is no impact to our partner organisations

**Are there any specific equalities implications?** Please provide a response for each protected characteristic/equalities consideration, even if the impact is neutral.

Protected characteristics and other equalities considerations	High (Positive / Negative)	Medium (Positive / Negative)	Low (Positive / Negative)	Neutral
Age				X
Disability				X
Ethnicity				X
Gender				X
Gender reassignment				X
Marriage and civil partnerships				X
Pregnancy and maternity				X
Religion and belief				X
Sexual orientation				X
Socio-economic inequality				X
Is a full EAA required?			N	

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

<b>Directorate</b>	Housing Services			
<b>Director</b>	Fen Beckman			
<b>Service area</b>	Housing Needs and Refugee Services			
<b>Cabinet Portfolio</b>	Housing Management and Homelessness- Cllr Cooper			
<b>Reference</b>	HSG05 – Cease Contribution to Capital Letters			
<b>Saving title</b>	Stop contribution to Capital Letters for Property Negotiator role			
<b>Description of saving</b> (including any specific elements or phasing to be considered)	<p>Lewisham is a member borough of Capital Letters, a pan London organisation working with ten London councils and private landlords to find homes for our homeless families in the private rented sector. Member boroughs currently have the option of either seconding staff to Capital letters or paying the salary cost of officers who are then employed by Capital Letters. Lewisham has chosen to pay the cost equivalent to the salary of one Property Negotiator which is £50,000.</p> <p>However, there is an unprecedented housing and homelessness crisis nationally and particularly in London, compounded by the cost-of-living crisis. Property listings have reduced by 41% since lifting the pandemic restrictions with only 2.3% of properties at LHA levels (down from 19% in 2020/21) and 25 applicants for each property listed. This has increased average rents by 23% in London, making them ever more inaccessible to those on low income or benefits. As a result, all London Boroughs are struggling to find sufficient good quality properties – whether PRS or PSL – to house those for whom they owe a duty, and costs of TA are escalating (£60m per month collectively).</p> <p>Capital Letters have not been able to acquire substantial numbers of affordable PRS properties for boroughs to use for discharge of duty. Capital Letters were offering 400 PRS properties a month to members but this year the projection is 300 for the entire 2023/24 year. It is therefore not sustainable to continue to pay for Negotiator roles when they are not able to deliver the outcomes, (properties), Boroughs need.</p> <p>This proposal is to stop paying Capital Letters the equivalent of an officer post and to make different arrangements with Capital Letters in return for access to any properties that they procure. Capital Letters have had discussions with Member Boroughs on alternatives to staff secondment.</p>			
<b>Division budget</b>	<b>Gross £</b>	54,015,896	<b>Net £</b>	8,383,337xx
<b>Service area budget</b>	<b>Gross £</b>	51,577,572	<b>Net £</b>	9,276,448
<b>Saving proposed</b>	<b>2023/24 £k</b>		<b>2024/25 £k</b>	<b>50</b>

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Risks:				
Cost shunt to other service? Y/N		No		
Likelihood of making cut in full - %		100%		
Impact of making the saving	The impact of making this saving is a reduction in the number of officers searching for properties for our families in housing need and a reduction in the overall capacity of the service to work with existing landlords and clients.			
Possible risk mitigation	We will retain a couple of Negotiator posts in-house to work on renewal of tenancies and to work with landlords to access what supply there is still available.			
Other considerations:				
Member or Officer decision	Officer			
Redundancies	Y/N	Not Applicable to LBL	Number of staff	Not Applicable
Public consultation	Y/N	No	Audience(s)	Not Applicable
Investment required (value of saving shown above should be net of this investment)	Y/N	No	Cost £k	Not Applicable
	In what:	Not Applicable		
Contingent on other actions / decisions / cross service work	Not Applicable			
Specific legal or statutory considerations	Not Applicable			

Impact & Outcomes
What is the likely impact of the proposed changes?
<b>Service Users</b>
There is very low impact to service users, ie our homeless households, as the number of new PRS properties that we have received have been very few and significantly below original targets. It should also be noted that the Council still has a Procurement team who are bringing in properties.
<b>Staff</b>
There is no direct impact to staff working in the Council as the funding was given to Capital Letters as a contribution to their staffing budgets and they employed the Property Negotiators.

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

Other Council Services				
The Capital Letters Property Negotiator role was supposed to bring in PRS properties to use for our homeless households. These properties would be additional to what the in-house Property Negotiators procure. There is very low impact to the Procurement Team in the TA Service as the Capital Letters Property Negotiator role was not giving value for money with very low numbers of properties being secured.				
Partners				
There is no impact to our partner organisations				
Are there any specific equalities implications? Please provide a response for each protected characteristic/equalities consideration, even if the impact is neutral.				
Protected characteristics and other equalities considerations	High (Positive / Negative)	Medium (Positive / Negative)	Low (Positive / Negative)	Neutral
Age				X
Disability				X
Ethnicity				X
Gender				X
Gender reassignment				X
Marriage and civil partnerships				X
Pregnancy and maternity				X
Religion and belief				X
Sexual orientation				X
Socio-economic inequality				X
Is a full EAA required?			N	

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

<b>Directorate</b>	Place																																																						
<b>Director</b>	Patrick Dubeck																																																						
<b>Service area</b>	Inclusive Regeneration																																																						
<b>Cabinet Portfolio</b>	Housing Development and Planning- Cllr Dacres																																																						
<b>Reference</b>	PLA01 – Council Offices Rationalisation																																																						
<b>Saving title</b>																																																							
<b>Description of saving</b> (including any specific elements or phasing to be considered)	<p>The Council's Catford office estate is made up of five buildings - Laurence House, Civic Suite, 9 Holbeach Road, Town Hall Chambers and Eros House. The table below summarises the current running cost for the complex:</p> <p><b>Catford Complex Running Cost 2022/23</b></p> <table border="1"> <thead> <tr> <th></th> <th>Rent</th> <th>Rates</th> <th>Utilities</th> <th>FM Costs</th> <th>Total</th> <th>Decarbonisation Cost</th> </tr> </thead> <tbody> <tr> <td>Laurence House</td> <td>£0</td> <td>£601,160</td> <td>£507,678</td> <td>£762,110</td> <td><b>£1,870,948</b></td> <td>£2,083,160</td> </tr> <tr> <td>Town Hall Chambers</td> <td>£0</td> <td>£69,938</td> <td>£13,192</td> <td>£51,555</td> <td><b>£134,685</b></td> <td>£1,100,006</td> </tr> <tr> <td>Civic Suite</td> <td>£0</td> <td>£105,336</td> <td>£329,247</td> <td>£96,006</td> <td><b>£530,589</b></td> <td>£228,371</td> </tr> <tr> <td>Eros House</td> <td>£282,100</td> <td>£47,880</td> <td>£39,918</td> <td>£63,477</td> <td><b>£433,375</b></td> <td></td> </tr> <tr> <td>Holbeach House</td> <td>£75,000</td> <td>£50,274</td> <td>£28,606</td> <td>£51,616</td> <td><b>£205,496</b></td> <td></td> </tr> <tr> <td><b>Total</b></td> <td><b>£357,100</b></td> <td><b>£874,588</b></td> <td><b>£918,641</b></td> <td><b>£1,024,764</b></td> <td><b>£3,175,093</b></td> <td><b>£3,411,537</b></td> </tr> </tbody> </table> <p>As part of a wider and ongoing asset review, officers have been reviewing possibilities for office consolidation to realise savings or generate income. This builds on work already undertaken over previous years to rationalise the estate and resulted in the conversion of the Old Town Hall into a Public Sector Hub with a current net income of circa £400k a year.</p>							Rent	Rates	Utilities	FM Costs	Total	Decarbonisation Cost	Laurence House	£0	£601,160	£507,678	£762,110	<b>£1,870,948</b>	£2,083,160	Town Hall Chambers	£0	£69,938	£13,192	£51,555	<b>£134,685</b>	£1,100,006	Civic Suite	£0	£105,336	£329,247	£96,006	<b>£530,589</b>	£228,371	Eros House	£282,100	£47,880	£39,918	£63,477	<b>£433,375</b>		Holbeach House	£75,000	£50,274	£28,606	£51,616	<b>£205,496</b>		<b>Total</b>	<b>£357,100</b>	<b>£874,588</b>	<b>£918,641</b>	<b>£1,024,764</b>	<b>£3,175,093</b>	<b>£3,411,537</b>
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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

Laurence House is the Council's core office building and pre-Covid was the office base for around 1700 staff plus the CCG. Since Covid and with new and more agile ways of working, office utilisation in the traditional sense, has declined significantly and even with the new Housing Directorate occupying space in the building, occupation levels are still below capacity and significantly lower than pre Covid usage. This provides an opportunity for further consolidation into Laurence House. In the short-term as identified in the adopted Catford Town Centre framework, it is intended that Laurence House will remain the Council's primary office location.

Of the other buildings in the complex, 9 Holbeach Road and Eros House are the only other two actively used office bases for Council teams. The former, 9 Holbeach Road, is the subject of this proposal.

The building is currently the base for about 100 staff across a number of services including Crime Reduction Service, Environmental Health and also houses the front-line Youth Offending Service.

The building is leased from CRPL on a full repairing and insuring basis at a rent of circa £75,000, a year. The current lease term is nearing expiry but has been extended previously and the Council can do so again. Building related operating costs for the property are approximately £200,000 a year, including rent. This is separate from other service specific costs such as security costs, which are borne by services as required. As part of the current lease obligation, the Council has planned works to the building estimated at over £300k, including refurbishment of the roof.

In line with the ongoing office rationalisation, it is proposed that the Council issues notice on its lease at Holbeach and staff and services moved to other buildings in the complex, primarily Laurence House. Many of the back-office functions currently operated from Holbeach can be moved relatively easily to the upper floors of Laurence House. However, front-line services, particularly Youth Offending Service, would require specific relocation consideration.

The former Catford Library space in Laurence House is not currently occupied and is an option for the relocation of Holbeach Road located services. It however requires extensive refurbishment and remodelling, including an upgrade of the mechanical heating and ventilation system in order to accommodate new uses. The current estimated cost to refurbish the space is £900k and is unfunded.

The table below provides a summary of the capital costs and the projected savings to the Place Directorate for implementing this proposal.

Projected Savings	
2024/25	£100k

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

	2025/26	£105k		
	<b>Total</b>	£205k		
<p>This projected savings in the above table represents all the building related costs currently incurred by the FM (Corporate Resources Directorate) and the Property and Estates Team (Place Directorate). Therefore, the savings will be accrued across separate budget lines.</p>				
<b>Division budget</b>	<b>Gross £k</b>		<b>Net £k</b>	
<b>Service area budget</b>	<b>Gross £k</b>		<b>Net £k</b>	
<b>Saving proposed</b>	<b>2023/24 £k</b>	<b>0</b>	<b>2024/25 £k</b>	<b>£100</b>
<b>Risks:</b>				
<b>Cost shunt to other service? Y/N</b>	No			
<b>Likelihood of making cut in full - %</b>	60%			
<b>Impact of making the saving</b>	<p>As noted above, staff working in Holbeach will need to move to a new location currently proposed to be Laurence House. While most of the back-office functions can be relatively easily accommodated on the upper floors of Laurence House, new and separate accommodation will be required for the Youth Offending Service because of the front line and specific nature of service delivery.</p>			
<b>Possible risk mitigation</b>	<p><b>Alternative Accommodation:</b> Suitable alternative accommodation cannot be found for the front-line services in Holbeach, particularly Youth Offending Service, which requires a safe, welcoming, and discreet space to be able to deliver their service.</p> <p><u>Mitigation:</u> The space in Laurence House formerly occupied by the Catford Library could be remodelled. There are other alternative sites in the Catford complex that will form part of options analysis, in consultation with the service.</p> <p><b>Empty 9 Holbeach Road:</b> The implication of this proposal is that the Council surrenders its lease on 9 Holbeach Road and hands it back to CRPL. This could result in loss of income to CRPL.</p> <p><u>Mitigation:</u> The current phasing of the Catford Framework Plan suggests that the Holbeach site is in the latter phases of delivery which means that the building could be in situ for another 10-15 years. This provides the potential for CRPL to relet the property to support its income for the portfolio. The Property and Estates team are currently aware of a number of organisations who are interested in space in Catford town centre.</p>			

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

<b>Other considerations:</b>				
<b>Member or Officer decision</b>	Officer Decision			
<b>Redundancies</b>	Y/N	N	<b>Number of staff</b>	N/A
<b>Public consultation</b>	Y/N	N	<b>Audience(s)</b>	N/A
<b>Investment required (value of saving shown above should be net of this investment)</b>	Y/N	Y	<b>Cost £k</b>	c£980k
	<b>In what:</b>	Capital investment will be required to remodel existing Council assets to accommodate the services currently located at Holbeach Road.		
<b>Contingent on other actions / decisions / cross service work</b>				
<b>Specific legal or statutory considerations</b>	N/A			

<b>Author</b>	<b>Gavin Plaskitt</b>	<b>Directorate</b>	<b>Place</b>
<b>Date</b>	<b>18.12.23</b>	<b>Service</b>	<b>Inclusive Regeneration</b>
<p><b>1. The activity or decision that this assessment is being undertaken for</b></p> <p>This assessment is being carried out to determine the impact of the closure of Holbeach office and the transfer of services operating from that location to Laurence House. This proposal is driven by a requirement for costs savings and an approximately £100k p.a. saving can be achieved by closing this outlying office.</p>			

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

2. The protected characteristics or other equalities factors potentially impacted by this decision				
<input type="checkbox"/> Age	<input type="checkbox"/> Ethnicity/ Race	<input type="checkbox"/> Religion or belief	<input type="checkbox"/> Language spoken	<input checked="" type="checkbox"/> Other, please define:
<input type="checkbox"/> Gender/Sex	<input type="checkbox"/> Gender identity	<input checked="" type="checkbox"/> Disability	<input type="checkbox"/> Household type	Client unease with formality/ authority figures
<input type="checkbox"/> Income	<input type="checkbox"/> Carer status	<input type="checkbox"/> Sexual orientation	<input type="checkbox"/> Socio Economic status	
<input type="checkbox"/> Marriage and Civil Partnership	<input type="checkbox"/> Pregnancy and Maternity	<input type="checkbox"/> Refugee/ Migrant/ Asylum seeker	<input checked="" type="checkbox"/> Health & Social Care	
<input type="checkbox"/> Nationality	<input type="checkbox"/> Employment	<input type="checkbox"/> Armed forces		
<p>This proposal does not involve any reduction in the services offered. Its main impact is that the physical location for staff to work and service users to access services will change. The change of location/facilities may have an impact on staff and service users with disabilities or those accessing mental health services.</p> <p>It is not obvious that the relocation will have an appreciable impact on any of the other protected characteristics or equalities factors. The services will simply transfer from one accessible location to another nearby.</p>				
3. The evidence to support the analysis				
<p>Approximately 83 staff have Holbeach office as their designated workplace:</p> <p>Crime, Enforcement and Regulation – c.35 staff</p> <p>Youth Offending Service/Child &amp; Adolescent Mental Health Services c.39 staff</p> <p>Environmental Health c.9 staff</p>				

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

Most staff work in a flexible manner in common with colleagues across the Council.

Face to face meetings are held between staff and clients for the purposes of managing youth offending, child and adolescent mental health and carrying out PACE interviews (under caution) by Environmental Health and Crime Enforcement and Regulation teams.

### 4. The analysis

There are no particular changes to the way we intend to deliver services to clients arising from the closure of the Holbeach office. The main difference is that the services will be delivered at a new location nearby, with new facilities.

Holbeach office and Laurence House are only 250m apart in the centre of Catford and have similar levels of transport accessibility for people around the borough.

It has been highlighted by Youth Offending Services that some of their client group experience unease with formality/ and uniformed security that are present in the main reception of Laurence House. This this will be need to be factored into the design of the new service delivery arrangements.

New meeting and therapy rooms will allow face to face service delivery by YOS and CAMHS staff in a similar way to how services are currently provided at Holbeach office. Children and young people will have a similar level of access to their case workers.

Staff from Holbeach will benefit from an improved office environment in the refurbished Laurence House. The building benefits from lifts and a range of accessibility features that are not present in their current building. This makes the building more suited to any staff with disabilities. The move will mean more hot desking for staff but the design and fit out of Laurence House with large monitors for hot desking and various collaboration spaces also contributes to a better working environment. One potential drawback requiring management is that increased hot desking can be disruptive for staff who require adapted workstations.

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

5. Impact summary					
Characteristic	High (+ve or -ve)	Medium (+ve or -ve)	Low (+ve or -ve)	Neutral	Summary
Age				x	
Disability	x +ve				Staff and clients benefit from a more modern building with lifts, accessible toilets, powered doors etc.
Ethnicity				x	Ethnicity is not expected to be impacted by the project
Gender		x +ve			Reduction in concern about anti-social behaviour amongst female staff entering/leaving the Holbeach office.
Gender reassignment				x	Gender reassignment is not expected to be impacted by the project.
Marriage and civil partnerships				x	Marriage and civil partnerships is not expected to be impacted by the project.
Pregnancy and Maternity				x	is not expected to be impacted by the project.
Religion and belief		x +ve			Staff will have access to the reflection rooms in Laurence House for religious observance.
Sexual Orientation				x	Sexual orientation is not expected to be impacted by the project.
Socioeconomic inequality				x	Socioeconomic inequality is not expected to be impacted by the project.
Other factors		x -ve			Clients uneasy with formality/ and authority figures (uniformed security) associated with Laurence House main reception.
6. Mitigation					
Disability					

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

A staff survey will be completed to understand whether any transferring staff require an adapted workspace so that the necessary adjustments can be arranged as part of the workplan.

### Other factors

It is proposed that there will be a separate reception for Youth Offending Services staffed by their own officers as it is important for their client group who sometimes feel uneasy in formal settings. By replicating the existing arrangements, we can ensure this does not create a barrier to attendance/service access.

### 7. Service user journey that this decision or project impacts

This project will change the location where services are delivered to a nearby location in Catford. With good communication it should be possible to transfer the services with minimum disruption to the way clients access services currently delivered from the Holbeach office.

**Signature of Director**

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

<b>Directorate</b>	Place
<b>Director</b>	Patrick Dubeck
<b>Service area</b>	Inclusive Regeneration
<b>Cabinet Portfolio</b>	Businesses, Jobs and Skills- Cllr Powell
<b>Reference</b>	PLA06 – One-Council Employment Support
<b>Saving title</b>	One-Council Employment Support Proposal
<b>Description of saving</b> (including any specific elements or phasing to be considered)	<p>Lewisham Works is the Council’s directly delivered employment and skills service for residents. This service launched in May 2022, and has already supported hundreds of residents to develop their employability, access training, and secure jobs related to their career goals. This element of the Jobs and Skills Service has been funded by a combination of S106 Employment and Skills ringfenced funding, but mostly since May 2022 by a European Social Fund “Connecting Communities” Grant. This grant allowed us to claim fully for staff salaries delivering employment support.</p> <p>The original ESF grant was due to finish in September 2023. Lewisham Works were able to achieve their core grant KPIs and were one of the best performing CLF boroughs in this area, and as a result we were able to draw down 100% of our grant allocation. Due to the Council’s high performance, CLF offered Lewisham and two other boroughs the opportunity to utilise pan-CLF underspends on a focussed 18-24 ESF allocation until December 2023. This was known as the ESF ‘NEET push’.</p> <p>The ‘NEET push’ presented an opportunity for Lewisham Works to collaborate with colleagues from Adult Learning Lewisham (Community Directorate) and Baseline (CYP) – to identify and encourage target young people to engage with the project. Our services overlap in our focus for supporting Lewisham residents with employment and skills participation.</p> <p>The Council is due to receive a UK Shared Prosperity Fund allocation for ‘People and Skills’ in 2024/25, although we are able to bring forward invoices and claims from January 2024. We are yet to receive a funding agreement for this grant, but we expect to receive circa £900k to be spent by March 2025 on supporting economically inactive residents to train and gain employment. We expect to claim staff salaries and commissioned employment support, and we must spend by March 2025. This funding is restricted to employment and skills.</p> <p>It is proposed that one officer from each service, providing overlapping advice and guidance to residents, is funded through UKSPF. These officers would be required to record resident interactions and outcomes on a single CRM system managed by Lewisham Works, used to report our performance to CLF against our UKSPF delivery. We expect to easily achieve our UKSPF KPIs, which are very modest. This would allow us to take a more integrated approach to how we support residents, from services across the Council.</p> <p>Claiming for these officer salaries offsets their General Fund cost in local budgets, as the Baseline and Adult Learning posts are funded through General Fund at present. We are not yet aware of future UKSPF allocations, so this represents a one-off contribution.</p>

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

	<p>This represents an in-year saving of £24,190.50.</p> <ul style="list-style-type: none"> <li>• 3 months of salary + on-cost at SCP25 (SO1) for two members of staff</li> <li>• This represents an individual saving to CYP and Communities of £12,095.25 in-year.</li> </ul> <p>It is also proposed we claim the full salary of each of these SO1 officer for the 2024/25 financial year:</p> <ul style="list-style-type: none"> <li>• This represents a saving of £96,762 approx. based on top of the SO1 salary scale.</li> <li>• This represents an individual budget saving of £48,381 to both CYP and Communities</li> </ul> <p>*These savings are not from Place budgets, explicitly they are offering creative solutions to provide savings elsewhere in the Council.</p>			
<b>Division budget</b>	<b>Gross £k</b>		<b>Net £k</b>	
<b>Service area budget</b>	<b>Gross £k</b>		<b>Net £k</b>	
<b>Saving proposed</b>	<b>2023/24 £k</b>	<b>£24</b>	<b>2024/25 £k</b>	<b>£96</b>
<b>Risks:</b>				
<b>Cost shunt to other service? Y/N</b>	This represents a shunt from Adult Learning and Baseline salaries to UKSPF, managed by Economy, Jobs and Partnerships			
<b>Likelihood of making cut in full - %</b>	80%			
<b>Impact of making the saving</b>	<p>By increasing the amount of UKSPF utilised for staff salaries, we potentially reduce the available funding for commissioning local organisations to deliver complimentary services. This does not have a significant impact, because the Council is set to receive more UKSPF than first-thought, and the Council also has S106 employment and skills pots which must be spent in the next 12 months.</p> <p>Due to last minute interventions by DWP in the UKSPF funding agreement, Lewisham Council is receiving £300k more UKSPF directly than first anticipated, so this does not have an immediate negative impact on Jobs and Skills planned activity.</p>			
<b>Possible risk mitigation</b>	N/A – utilising S106 offsets any potential risk to planned Jobs and Skills activity.			

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**APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)**

<b>Other considerations:</b>				
<b>Member or Officer decision</b>	Officers Decision			
<b>Redundancies</b>	<b>Y/N</b>	N	<b>Number of staff</b>	N/A
<b>Public consultation</b>	<b>Y/N</b>	N	<b>Audience(s)</b>	N/A
<b>Investment required</b> (value of saving shown above should be net of this investment)	<b>Y/N</b>	N	<b>Cost £k</b>	£0k
	<b>In what:</b>	N/A		
<b>Contingent on other actions / decisions / cross service work</b>	<p>This saving is contingent on Adult Learning and Baseline staff recording their resident support work on the Lewisham Works CRM.</p> <p>We will create and SLA and sufficient support to allow those staff to record progress in a compliant fashion.</p>			
<b>Specific legal or statutory considerations</b>	N/A			

EIA Screening

<b>Impact &amp; Outcomes</b>
<b>What is the likely impact of the proposed changes?</b>
<b>Service Users</b>
<p>There is no impact expected for service users as a result of this decision. Service Users will continue to receive the same level of support from Lewisham Works, Adult Learning and Baseline.</p>
<b>Staff</b>

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

There is a neutral impact on staff outside of the Lewisham Works funded by this grant – that they will be required to record monitoring data on the ‘Hanlon’ system used by Lewisham Works to record client progress. Otherwise, there is no impact on the employment status and day to day work of staff. The UKSPF People and Skills funding aligns with normal day-to-day duties of staff funded by this grant. The two officers outside of Lewisham Works will benefit from more joined-up working and practice across the Council.

### Other Council Services

There is a positive financial benefit to Adult Learning and Baseline – who will both receive grant funding to supplement Council General Fund for salaries. There are no other impacts to Council services.

### Partners

There are no impacts to external partners arising from this decision.

**Are there any specific equalities implications?** Please provide a response for each protected characteristic/equalities consideration, even if the impact is neutral.

Protected characteristics and other equalities considerations	High (Positive / Negative)	Medium (Positive / Negative)	Low (Positive / Negative)	Neutral
Age				X
Disability				X
Ethnicity				X
Gender				X
Gender reassignment				X
Marriage and civil partnerships				X
Pregnancy and maternity				X
Religion and belief				X
Sexual orientation				X
Socio-economic inequality				X

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

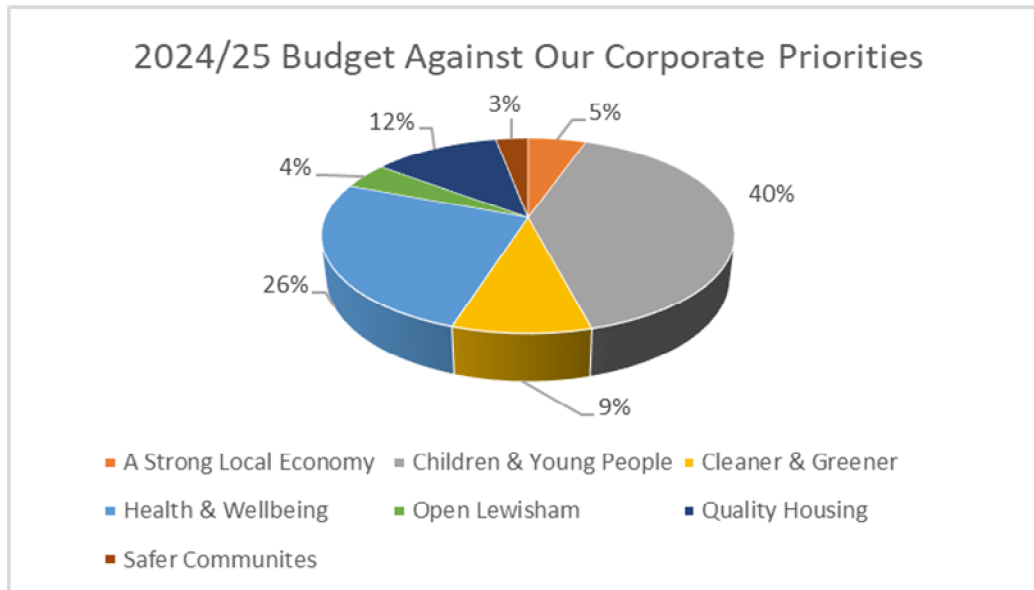
Is a full EAA required?	N
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## APPENDIX Y3: 2024/25 Budget Against Lewisham Council's Corporate Priorities



As required under the CIPFA Financial Management Code of Practice, the Council must demonstrate how its budget is aligned to its corporate priorities. The above provides an indicative allocation of the proposed net budget for 2024/25 against the seven corporate priorities. This allocation is draft and will be refined alongside the CIPFA Code of Practice requirements more generally as the activities in support of the new Corporate Strategy 2022-26 evolve and develop.

### Is this report easy to understand?

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**APPENDIX Y4: Ready Reckoner for Council Tax 2024/25**

	Lewisham Budget Requirement	Council Tax (Band D)	Uplift in Lewisham Council Tax* vs. 2023/24	GLA Precept (Band D)	Total Council Tax (Band D)	Increase in Total Council Tax vs. 2023/24
	£m	£	%	£	£	%
<b>2023/24</b>	<b>263.679</b>	<b>1,492.13</b>	<b>4.99%</b>	<b>434.14</b>	<b>1,926.27</b>	<b>6.02% (vs. 2022/23)</b>
<b>2024/25</b>	<b>293.838</b>	<b>1,566.58</b>	<b>4.99%</b>	<b>471.40</b>	<b>2,037.98</b>	<b>5.80%</b>
	292.490	1,551.67	3.99%	471.40	2,023.07	5.03%
	291.140	1,536.74	2.99%	471.40	2,008.14	4.25%
	289.791	1,521.82	1.99%	471.40	1,993.22	3.48%
	288.456	1,507.05	1.00%	471.40	1,978.45	2.71%
	287.781	1,499.59	0.50%	471.40	1,970.99	2.32%
	287.107	1,492.13	0.00%	471.40	1,963.53	1.93%

\* Includes Adult Social Care precept.

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## **APPENDIX Y5: Chief Financial Officer's Section 25 Statement**

This statement makes reference to the 2024/25 Budget Report to Mayor & Cabinet and Full Council as circulated to all Members.

Section 25 of the Local Government Act 2003 required the Chief Financial Officer (CFO) to report to an authority when it is making the statutory calculations required to determine its Council Tax. The Authority is required to take the report into account when making the calculations. The report must deal with the robustness of estimates, included in the budget and adequacy of the reserves, for which the budget provides. This statement also reflects the requirements of CIPFA's current Local Authority Accounting Panel (LAAP) Bulletin 99 on 'Local Authority Reserves and Balances'.

Section 114 of the Local Government Act 1988 requires the CFO to issue a report to all the Local Authority members to be made by that officer, in consultation with the Monitoring Officer and Head of Paid Service, if there is or is likely to be unlawful expenditure or an unbalanced budget.

### **1. Structure of the Statement**

- 1.1. This statement sets out my view of the robustness of the Council's budget in respect of external and internal risks for 2024/25. I do this addressing the estimates, assumptions and plans used in preparing the Budget for 2024/25, as well as the reserves held to manage these risks should they materialise.
- 1.2. The statement contains the following sections:
  - Economic Factors;
  - Government Policy – now and looking ahead;
  - Budget Setting process and risks;
  - Organisation Resilience;
  - Monitoring and reporting; and
  - Conclusion and Opinion.

### **2. Economic Factors**

- 2.1. Inflation remains higher than the Bank of England target of 2% and is taking longer to fall from the recent double digit highs of a year ago. Higher inflation adds pressure to the Council's Budgets and the slow rate of its decline creates an inflationary lag through the Council's contracts and staff costs. It also keeps pressure on residents through cost of living pressures and the cost of housing, whether through mortgage rates or rents. Growth in the wider economy is currently flat with a risk of recession which puts pressure on employment opportunities. These environmental factors combine to increase the demand for Council services - already the 63rd (of 317 so in

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the top 20%) most deprived authority nationally and eighth in London - which are now more expensive to deliver.

- 2.2. In addition to the general economic environment there are two more specific factors for local government impacting the Council's budget. These are:
- the limited supply and ageing nature of housing stock, particularly acute in London, impacting both the cost of temporary accommodation and quality of available social housing.
  - the market incentives for the ownership and running of care homes impacting the availability and affordability of suitable social care placements for both vulnerable Children and Adults.

### 3. Government Policy – Now and Looking Ahead

- 3.1. The UK is facing a general election before January 2025 which is impacting more medium to long term planning. In particular for the widely acknowledged need for local government finance reform. The reforms to Business Rates, revaluation or changes to Council Tax, revising of Fair Funding and Fair Cost of Care arrangements to support 'levelling up' have all been delayed again. These combine with more reliance on ad hoc but increasingly large grant arrangements to enable local authorities to manage 'hand to mouth'. Together this short term one year at a time financial planning constrains the Council's ability to plan larger changes with confidence.
- 3.2. The Council also recognises the risk that local government as a relative priority for the allocation of additional resources, when compared to the demands for Health, Education or Defence priorities, will likely be lower down any government's policy list. The Medium Term Financial Strategy (MTFS) therefore assumes budget reductions of at least c£10m for each of the coming four years. For these reasons the full increases for Council Tax and Rents are recommended to preserve, as far as possible, the Council's financial base.

### 4. Budget Setting Process and Risks

- 4.1. The Council's budget setting process is well established and has been followed for this Budget. This includes extensive engagement with officers, Members through briefings and scrutiny and the Executive over the year. These discussions focus on changes and developments to the assumed funding available and plans for allocating those resources to service priorities. The Budget is the summary culmination of those discussions setting out the Council's plans for 2024/25.
- 4.2. As part of the Budget judgements are made using assumptions and estimates which are also discussed along with the risks that attach to them. Some of the key risk considerations for 2024/25 are set out below.

#### General Fund revenue

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

- Growing service demand through external factors in the face of rising vulnerability and need for services from an increasing population.
- Services overspending against allocated budget as they are unable to effectively contain costs and manage demand pressures.
- Failure to collect all income owing for services provided, thereby limiting the level of resources available to reinvest in improving the Borough.
- Delivery of agreed savings to ensure the Budget remains balanced and for which an allowance and commitment of some reserves are made.

### Related Funds for Schools and Housing that may impact the General Fund

- 21 schools are now in deficit and Special Education Needs spending (under the, unusual, accounting override in place) now has a cumulative deficit of c£13m. Unless managed by the schools, these are future risks to the general fund.
- In recent years HRA rent caps have constrained the level of income to manage existing and develop new stock. This combines with higher costs to manage an ageing estate, the need to address new regulations and provide sufficient supply in the face of a growing housing waiting list.

### Capital programme and treasury strategy

- Since 2018 the Council has been seeking to progress an ambitious capital programme, primarily focused on addressing the lack of housing supply in the Borough. Through the pandemic and more recent period of economic uncertainty the programme has faced delay and rising costs which challenge the modelled financial assumptions. In addition, the Council is seeking to progress wider estate and town centre regeneration which, if agreed, will further extend the capital programme in future years.
- The capital programme uses a combination of grants, receipts and borrowing. The need for borrowing, alongside the Council's investment balances, is assessed in line with the treasury strategy. In light of recent high interest rates and uncertainty on timings for schemes the Council has increased the level of internal borrowing to mitigate these risks, noting this measure is short term so future borrowing will still be required.

4.3. All of the above risks and pressures are recognised in the preparation of the Budget report and will require continued active monitoring.

## 5. Organisation Resilience

5.1. The Council has an established financial management process with effective governance arrangements in place. These are operating well and the Council has received timely and unqualified audit opinions on its accounts and value for money arrangements for the 2022/23 fiscal year. For 2023/24 the Council's auditors will be changing to KPMG which will provide another opportunity to demonstrate the Council's arrangements remain robust and serve the Council appropriately.

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

- 5.2. I am a member of the Council's Executive Management Team and the Finance team do not remain complacent. Together we continue to look for ways to improve the value finance bring to supporting services delivering for residents. These include advice and regular reviews of potential investments, procurement and contract management, budget monitoring, process and system improvements and delivery of payroll and pension services to the Council and its Schools. We also review and maintain the financial regulations and procedures as part of the Constitution to ensure risk management and control arrangements are in place and operating.
- 5.3. Underpinning these day-to-day activities is the Council's balance sheet, in terms of both the assets and liabilities to be managed. Ultimately expressed as the reserves held to mitigate any shocks to the Council's plans. The Council has retained £20m as its unearmarked reserve for 2024/25, which represents c5% of the gross annual general fund service spend. The Council in 2023/24 also held £205m of earmarked reserves badged to operational risks, contractual commitments, and planned investments in future service improvements. These are regularly reviewed and discussed with Members through the year as part of the MTFS and financial monitoring reports.

### 6. Monitoring and Reporting

- 6.1. The Council has developed new risk and performance reports through 2023/24. Continuing this work, expansion and improvement of the way both risk and performance reporting aligns with the Council's financial monitoring reports are areas to be strengthened going forward. This will help ensure the financial resources of the Council remain effectively allocated to best support the priorities of the Corporate Strategy and inform decisions where choices, either to make savings or opportunities to invest, are required.
- 6.2. Recent parliamentary public accounts discussions, National Audit Office reports and auditor reports at councils issuing s114 notices highlight the importance of effective governance and understanding of financial risks in local authorities. In response to this the Office for Local Government (Oflog) has been established to develop a more risk based set of performance indicators for the local authority services to report on and help bring earlier challenge and learning to manage risks more effectively. Oflog's work, in the spirit of critical friend, should supplement and strengthen the work Council's auditors and of CIPFA and their guidance issued (for example; in respect of their financial management code, prudential borrowing and treasury strategy requirements) to help keep Council finances safe.
- 6.3. The Council will continue to develop it's own monitoring and work to use these additional sector wide resources to improve the value of data collected to inform better decision making going forward. Finance must play its full part in this journey and reflect the learning through the MTFS and Budget plans.

### 7. Conclusion and Opinion

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

- 7.1. The Council's governance arrangements are working well, ensuring robust and appropriate information is available to decision makers when committing the Council's resources and delivering services to the Borough's residents. Having strong and effective governance also supports Members and Officers remain open to looking for continual improvement and addressing challenges directly as they arise.
- 7.2. Nonetheless, recognising the wider economic and societal pressures and the adequacy of the Council's resources to address these locally, the level of risk the Council is carrying continues to rise. This includes the number of risks, their potential severity and their concentration in terms of reliance on reserves as mitigation. In particular from a financial perspective for 2024/25 I highlight the importance of;
- the management of the Housing Revenue Account and related capital programme with the available financial means,
  - ensuring that social care services manage within their allocated budgets (adjusting priorities to address any overspending in-year), and
  - further developing the medium-term plans for the Council's financial security, including investments in services and regeneration plans.
- 7.3. For 2024/25 I am satisfied the Council has effective financial management arrangements in place, there are sufficient provisions and reserves held to manage the potential risks and external shocks to the financial position, and the Budget proposals to Full Council are robust.

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## APPENDIX Y6: Council Tax and Draft Statutory Calculation

### Council Tax Calculation

As part of the Localism Act 2011, core Council Tax may not be increased by 3.00% 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 2.00% under the social care precept for 2024/25. This means, for 2024/25, an automatic referendum will be triggered if the Council Tax increase is 5.00% or above. The recommended social care precept for 2024/25 is 2.00%, 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 2024/25. A zero percent increase has been assumed for these.

### Council Tax and Levies

'Relevant Basic' Amount of Council Tax	2023/24	2024/25
Council Tax Base	88,848.50	90,414.00
Council Tax Requirement with Levy (£)	132,573,512	141,640,764
Basic Amount of Council Tax (£)	1,492.13	1,566.58
<b>Increase in basic amount of Council Tax* (%)</b>	<b>4.99%</b>	<b>4.99%</b>

\* Excludes GLA Precept increase.

Levy bodies for Lewisham	2023/24 £	2024/25 £	Variance £
LPFA	1,262,746	1,262,746	0
Lee Valley Regional Park	210,335	210,335	0
Environment Agency	209,476	209,476	0
<b>Total Levies</b>	<b>1,682,557</b>	<b>1,682,557</b>	<b>0</b>

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**).

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

### Statutory Calculations

1. It should be noted that at its meeting on 17 January 2024, the Council calculated the number of **90,414.0** as its Council Tax base for 2024/25 in accordance with the Local Authorities (Calculation of Tax base) Regulations;
2. It should be noted that the following amounts be now calculated by the Council for the year 2024/25 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) £1,553,432,747 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) £63,282 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.
  - g) £869,420 being the amount which it estimates will be transferred in the year from its general fund to its collection fund in accordance with regulations under section 97(2B) of the 1988 Act.
5. **The authority must calculate the aggregate of [in accordance with Section 31A (3) of the Act]:**
  - h) £1,410,618,680 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.
  - i) £2,106,005 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.
  - j) £nil 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
  - k) £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.

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- l) £nil being the amount which it estimates will be transferred in the year from its collection fund to its general fund in accordance with regulations under section 97(2A) of the 1988 Act.

### 6. Council Tax Requirement:

- m) £141,640,764 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.
- n) **£1,566.58** being the residual sum at (k) above, divided by the Council Tax base of **90,414.0** which is Lewisham's precept on the Collection Fund for 2024/25 at the level of Band D;

Band:	Council Tax (LBL): £
A	1044.39
B	1,218.45
C	1,392.52
<b>D</b>	<b>1,566.58</b>
E	1,914.71
F	2,262.84
G	2,610.97
H	3,133.16

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 2024/25, 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: £
A	314.27
B	366.64
C	419.02
<b>D</b>	<b>471.40</b>
E	576.16
F	680.91
G	785.67
H	942.80

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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 2024/25 for each of the categories of dwellings shown below:-

<b>Band:</b>	<b>Total Council Tax (LBL &amp; GLA):</b> £
A	1,358.66
B	1,585.09
C	1,811.54
<b>D</b>	<b>2,037.98</b>
E	2,490.87
F	2,943.75
G	3,396.64
H	4,075.96

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## APPENDIX Y7: Summary of Proposed Budget Pressures to be Funded in 2024/25

Description	Base Budget £'000	Once off £'000	Total £'000
<b>Corporate Strategy Priorities:</b>			
Quality Housing			10,993
Temporary Accommodation	8,000	1,993	
Corporate Support for Delivery of Housing	1,000		
Children and Young People			17,028
Children's Social Care & SEN Transport	14,922	2,106	
Health & Wellbeing			10,781
Adult Social Care & Ringfenced Grants	8,201		
Concessionary Fares	2,500		
Public health Funerals	80		
<b>Total Corporate Strategy Priorities:</b>			<b>38,802</b>
<b>Organisational Value for Money:</b>			
Corporate Services	400		
Technology & Digital	606		
Legal Pressures	1,000		
<b>Total Organisational Value for Money:</b>			<b>2,006</b>
<b>Salary inflation for 2024/25</b>	5,816		5,816
<b>Shortfall in salary uplift for 2023/24</b>	1,844		1,844
<b>Non-pay inflation for 2024/25</b>	4,401		4,401
<b>Grand Total Funded Pressures</b>	<b>48,770</b>	<b>4,099</b>	<b>52,869</b>

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## APPENDIX Y8: Fees and Charges for 2024/25



# Mayor and Cabinet

**Report title:** Proposed Fees and Charges for 2024/25

**Date:** 7 February 2024

**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 2024/25, 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 2024 and the underlying policy.

### Timeline of engagement and decision-making

29 January 2024 – Public Accounts Select Committee (PASC)

1 March 2023 – Budget Report 2023/24 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 2024/25. Charges are

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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:

- Approve the Corporate Charging Policy 2024/25 as set out in this report for introduction as of 1st April 2024.
- Approve the proposed fees and charges set out in this report for introduction as of 1 April 2024 except for the Parking charges that are subject to consultation.
- Approve the new fees and charges to be introduced from 1<sup>st</sup> April 2024 .  
These include the following:
  - Facilitated Non-LBL Schools (Green Scene) - Section 5.1;
  - In-perpetuity Rights (Library and Information Services) - Section 5.6;
  - Photography Permit Full Day (Library and Information Services) - Section 5.6;
  - Planning - Section 5.15;
  - Fly tip – More than a small car boot load (Commercial Waste) - Section 5.21;
  - Annual Subscription via DD (Garden Waste) - Section 5.22;
- Approve that those changes still subject to consultation are delegated to the Executive Director of Housing, Regeneration and Public Realm to consult on and agree in line with the agreed policy.

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

#### 3.2. Corporate Priorities

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

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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.

### 3.4. Values

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 of fees and charges to ensure that these recover the full cost of delivering the services wherever permissible and appropriate supports the Councils 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

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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 2024/25 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 2024/25

The proposed 2024/25 charges as compared with 2023/24 are appended.

#### 5.1. Green Scene

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

##### Pest Control

These are proposed to increase in line with inflation at circa 7.7% and have been rounded for the simplicity of payment.

##### Clinical Waste

Clinical Waste fees and charges will increase in line with inflation at circa 7.7% and have been rounded for the simplicity of payment.

##### Allotment

Allotment rents will be increased by 7.7% for 2024/25. 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.

##### Nature Conservation

Fees and charges for Nature Conservation are proposed to increase in 2024/25 by between 8.7-15.38%. These increases are set higher than 7.8% assumed inflation due to figures being rounded up to the closest integer to make administration of fees and charges easier as requested by users.

An exception to the above would be the 65% reduction in the fee for Additional LBL School sessions. This reduction in the discretionary fee has been introduced to remove the barriers for non-primary age local school children to access environmental education sessions. Primary age school children are offered environmental education sessions as per the Mayor's manifesto commitment.

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A new fee relating to Facilitated non-LBL School sessions has been introduced for 2024/25. This discretionary charge is set at £165 per class and has been priced to cover costs.

### Outdoor hire in Beckenham Place Park

Charges for commercial events and community events are proposed to increase by 6.6% to 7.1% in 2024/25.

#### 5.2. Licensing

The fees and charges for Licensing and Gambling are both determined on a statutory basis under the Licensing Act 2003 and the Gambling Act 2005 respectively. Currently all the statutory charges have no proposed increases for 2024/25. All other discretionary fees and charges are proposed to be increased by 7.7% for 2024/25 which is in line with inflation.

There are a variety of new fees and charges relating to 3. Animal Activity Licences. These can be categorised by either Part A or Part B. The Part A fees for 2024-2025 are calculated using a methodology that includes the different costs associated with administration for each activity type, and the additional costs to inspect the premises. The Part B fees are calculated using a methodology that includes anticipated costs in respect of inspection, monitoring compliance, and enforcement. Both Part A and Part B fees now recharge the inspections costs to the applicant/licence holder.

#### 5.3. Tennis Courts

Following a consultation period, the Fees and Charges for the use of the Councils Tennis Courts for both members and non-members will remain the same in 2024/25. These fees are set on a discretionary basis.

#### 5.4. Leisure Centres

The fees and charges for Leisure Centres can be broken down by our leisure centre operators; 1Life Downham Health and GLL. All the fees and charges for both operators are charged on a discretionary basis.

Many of the fees and charges for 1Life Downham Health have increased below the set level of inflation of 7.7%. In instances where the discretionary charge increase is higher than 7.7%, figures have been rounded up to the closest integer to simplify the administration process of the fees and charges. The provision of services such as Be Active, Childrens Admission Activities and Creche facilities are no longer being provided going forward.

Fees and charges for the GLL operated leisure centres have increased by an average of 6.4% across the services provided which is in line with the agreed inflation level of 7.7%.

#### 5.5. Community Centres

All fees and charges for Community Centres are charged on a discretionary basis and the proposed increase in fees will be between 6.8%-10% which is in line with inflation. Fees have been rounded for help facilitate payment. Cases where the increase in price is above the rate of inflation can be attributed to larger community

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spaces that provide more service to their users. These higher increases also offsets proportionally smaller centres that have seen their prices increase below the level of inflation.

### 5.6. Library and Information Service

The fees and charges for the Library and Information Service are all discretionary and have proposed increases of 7% which is in line with inflation. The new proposed charges have also been rounded for simplicity. For instances where the proposed increase in charges exceeds 7.7% (eg 17% or 25%), these will relate to items of minimal value such as printing and photocopying materials. These larger increases help ensure full cost recovery.

There are two new services, a Full Day Photography Permit and in-perpetuity rights. The introduction of the photography permit allows Archive and Local History Service researchers and scholars to photograph archival material. Whilst the in-perpetuity rights allows Archive and Local History Service researchers and scholars to use reproduced material (copy, photocopy, photography, etc.) in perpetuity.

### 5.7. Adult Social Care

#### Non-residential Unit Cost

The Non-residential unit cost for social care for 2024/25 will be £21.14. This figure represents a rate that was set and agreed at MWAH Board which represents efficiency savings from the contract. The Council is only able to recharge the real cost of the service, which has been estimated to be £21.14. This figure is reviewed annually.

#### Brokerage Fees

This charge was introduced on 1<sup>st</sup> April 2024 for people with capital above the upper capital threshold limit and therefore 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 administrative charge for this service was set at £300 for 23/24 and has increased in line with inflation by 7.7% to £323.10. This will impact existing self-funders as well as new entrants.

### 5.8. Adult Learning

The fee for the Community Learning courses have been brought closer to the hourly rate for non-funded full cost recovery courses for those learners who do not qualify for the concessionary rate and are charged on a discretionary basis. The remaining fees and charges relate to the sale of items within the café and are therefore charged on a traded service basis. The fees for these items have proposed increases by 6.25% to 7%, which is below the level of inflation. Given the price per café item can be relatively small, these have been rounded appropriately.

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### 5.9. Bereavement

The majority of fees and charges for Bereavement were increased by 10.1% in 2023/24 in line with inflation. The fees and charges for Bereavement can be categorised by either Resident or Non-Resident charges, all of which are charged on a discretionary basis under The Local Authorities' Cemeteries Order 1977. The proposed increase for the services is circa 7.7% for 2024/25 with figures rounded for simplicity and represents cost recovery for services, including overheads.

Residential and Non-Residential charges relating to private graves and grave purchases have been reduced at face value by removing the incorporated digging fee, resulting in two separate charges.

Charges for services specifically for residents relating to Coffin drop-offs, Interment Fees and Adult Direct Cremation have all been frozen to support low-income families.

### 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 2024/25. Similarly, all concessionary travel concession fees and charges will not be increase for 2024/25.

### 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 2024/25. Ceremonies are comprised of a fixed statutory fee of £46 in addition to a discretionary charge on top. These ceremony discretionary fees and charges are proposed to increase by 7.3% to 7.7% which is in line with inflation. Private Citizenship Ceremonies however are charged entirely on a discretionary basis with no statutory element, these are also proposed to increase by 7.3% in line with inflation.

### 5.12. Street Environment Service

The fees and charges for Street Environment Services were substantially amended in accordance with the budget reduction proposals agreed by Mayor and Cabinet on the 7th December 2022. Fees for the services have increased by circa 7.7% which is in line with inflation, with figures rounded appropriately for the convenience of payment.

Bin Hire for Managing Agents is a fee that is only charged to large social housing providers. This fee has increased above the 7.7% inflation rate in attempt to help recover costs of providing the service as previous fees didn't cover the costs. Historically this fee hasn't changed.

### 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. Licencing fees consist of a flat rate £33 application/renewal fee and then a charge

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per square metre. Fees were kept constant for several years resulting in Lewisham being one of the cheapest licensing authorities for forecourt charges in South East London. The fees for forecourt licencing were increased by 10% in 2023/24 and as a result no further increases are currently proposed for 2024/25.

### 5.14. Building Control

In prior years the fees and charges were increased above the rate of inflation to recover costs. The proposed increase for fees and charges for 2024/2025 are in line with inflation at circa 7.7% and have been rounded for the simplicity of administration and payment.

It should be highlighted that the Building Control department still makes a loss. 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. Statutory fees were increased on 6 December 2023 at 35% for Major planning applications and 25% for all other application types. The hourly charge out rates for planning staff have been increased by 10%. The majority of the discretionary fees charged by the Planning Service and Local Land Charges services have not been increased this year in order to remain competitive with other commercial service providers. However, the Planning Service has also introduced some new charges such as to be included on the self build register .

### 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 7.1 to 8%% in line with inflation and allowing for the rounding of fees. The only substantive percentage change would be the increase in the Hoarding Licence. This charge has been brought into line with a Scaffold Licence. Hoarding and Scaffold Licences use the same officer time. The cheaper Hoarding Licence is a historical anomaly. Over the years as percentage rises have been added, the price gap between licences increased.

### 5.17. Street Name and Numbering

The fees and charges for SNN are on a discretionary basis, all of which are proposed to increase by 6.35% to 7.68% in 2024/25 which is in line with inflation. The individual fees and charges have all be rounded appropriately for the convenience of payment.

### 5.18. Private Sector Housing and Home Improvement

The discretionary fees and charges for Private Sector Housing and Home Improvement all have a proposed increased of 7.7%.

The penalty fees for Civil Penalty Notices are set externally by the Smoke and Co regulations and therefore the Council has no control in setting the fees that might apply. There are no proposed increases in the Civil Penalty Notices. The penalty fees are calculated via an assessment of the offender's culpability and the amount of actual or potential harm their behaviour caused to create a baseline amount. This

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fine will be up to a fixed ceiling depending on the status of the breach. These penalty notices are statutory in the sense that the power to levy them come from Housing and Planning Act 2016 or the Electrical Safety Standards in the Private Rented Sector (England) Regulations 2020.

### HMO License fee

The chargers for Additional and Mandatory HMO license fees will currently remain the same as 2023/24. At present legal advice on advisability of uprating license fees is not clear, placing the council at potential risk of challenge. In addition, schemes are costed to consider inflationary uplift and the current scheme is covering costs. Mandatory HMO licensing fees will be reviewed next year.

### Empty Homes

A charge of £183+ VAT will be issued to provide letters confirming that a property has been empty for a period of 2 years. The letter enables developers and homeowners to claim VAT reduction or exemption whilst bringing the property back into use. This is an increase of 7.7% from 2023/24 and sits in line with inflation.

### Agency and Adaption Fees – Disabled Facilities and Housing Regeneration Grant

These fees are charged at either 15% or 17.5% of the approved cost of works. The Housing team have been advised by Foundations that the councils existing agency fees are already at the higher end of the scale and therefore there is no inclination to propose an uprate at this time.

#### 5.19. Environmental Health and Environmental Protection

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 2024/25. The fees have not been increased since 2011. Fees for the administration of Zoo licences are discretionary. An increase of 10% is proposed for 2024/25.

All other fees and charges relating to Environmental health and Environmental Protection have been services that Lewisham have previously provided.

#### 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). Both fees for these services have a proposed increase by 7.7% which is in line with inflation. They are both traded services under the Housing Act 1996.

#### 5.21. Commercial Waste

All fees and charges for Commercial Waste relating to contracts have been proposed to increase by circa 7% which is in line with inflation. The only exception being Refuse Sacks where a revision to the unit cost has occurred in response to discounts where customers buy in bulk. The basis for charging for these services is traded.

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The Fixed Penalty Notices relating to minor instances of fly-tipping have remained the same, whilst changes in legislation has allowed for a new penalty notice to be introduced for significant cases of fly-tipping.

### 5.22. Garden Waste

Following benchmarking exercises, the fees and charges for services relating to Garden Waste will remain the same for 2024/25. An Annual Subscription via Direct Debit has also been introduced to help reduce the cost of the service to residents. All fees and charges are charged on a statutory basis.

### 5.23. Parking

#### Parking Overview

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.

In order to align with the Air Quality Act and Lewisham's Climate Action Plan to reduce the levels of commuting, we are proposing to increase the charges to majority of parking service fees by 7.7% in line with the current inflation rates for FY 24/25 in exception of Community Health Permit.

In support of NHS colleagues who are directly deployed into the community to provide community palliative/ midwifery care deemed as essential car users, the Council is proposing to reduce the permit fees by 25%.

Diesel surcharge will apply to those vehicles not meeting the Euro 6 compliance, the surcharge will increase from £70 to £75 to all permit types. Diesel surcharges will also apply to pay-to-park (short term parking) for both on- and off-street parking, and the surcharge will increase from £2.50 per session to £2.70 per session.

#### Permit Fee Subscription Service

To reduce the impact on residents and businesses we are proposing to introduce continuous payments for Resident, Housing Estate and Business Permits. This will allow permit holders to spread the cost of their permit continually until the subscription is cancelled by the permit holder. Any customer signing up for the subscription service will be notified of the price increase min of one month period prior to the actual increase on monthly instalment payment. Any customers opting in for the service will NOT be eligible to receive free 10 visitor vouchers as this is only offered to those customers purchasing a full annual permit purchasing customers only.

#### Resident Permits including Motorcycles

A uniform increase of 7.7% has been proposed for 2024/25 across all emission banding tariffs. Furthermore, a diesel surcharge will apply to those vehicles not meeting Euro 6 compliance standards, this surcharge will increase from £70 to £75 in 2024/25.

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### Resident Visitor Vouchers

A uniform increase of 7.7% has been proposed for 2024/25 across all emission banding tariffs. Furthermore, a diesel surcharge will apply to those vehicles not meeting Euro 6 compliance standards, this surcharge will increase from £70 to £75 in 2024/25.

Customers purchasing annual permits (in exception of exemption permits) will continue to receive a book of 10 visitor vouchers to encourage annual permit sales.

### Business Permit (Single Zone & All Zone Permit Z) including Motorcycles

A uniform increase of 7.7% has been proposed for 2024/25 across all emission banding tariffs. Furthermore, a diesel surcharge will apply to those vehicles not meeting Euro 6 compliance standards, this surcharge will increase from £70 to £75 in 2024/25.

### Business Charity Permit

A uniform increase of 7.7% has been proposed for 2024/25 across all emission banding tariffs. Furthermore, a diesel surcharge will apply to those vehicles not meeting Euro 6 compliance standards, this surcharge will increase from £70 to £75 in 2024/25.

### Community Health Permit (previously known as Essential Health Permit)

For FY 24/25, it is proposed that a circa 25% reduction in price is offered across all banding and tariff charges for both compliant and non-compliant vehicles. Since last year, the emission banding charges became applicable to this permit type. The Council received multiple feedback instances from NHS staff members at Palliative/ Midwifery division asking us to review the policy as this was negatively impacting their personal finance. In the majority of cases we came across, the users are to be deemed to be essential car users as they are often expected to carry heavy mobile devices to deliver care.

This permit type will however only be permitted to those deemed as essential car users deployed into the community to deliver home care only. The reduction in parking fee will alleviate NHS from financial pressure and ensure quality of care or welfare of the NHS colleagues are not compromised by the Council's fee proposal. This will mean a petrol vehicle in band 4 will be reduced from £1.76 (£550 per annum) to £1.32 (£412.50 per annum).

A diesel surcharge will apply to those vehicles not meeting Euro 6 compliance standards, this surcharge will increase from £70 to £75 in 2024/25.

### Hospital Permits including Motorcycles

A uniform increase of 7.7% has been proposed for 2024/25 across all emission banding tariffs. Furthermore, a diesel surcharge will apply to those vehicles not meeting Euro 6 compliance standards, this surcharge will increase from £70 to £75 in 2024/25.

### Housing Estates

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Over the past year, 38 Housing Estates are being enforced, similar to On-Street enforcement. i.e., parking tickets are issued to vehicles not displaying the relevant permit or parking on yellow lines. Parking Service also issues permits for parking on estates.

For the FY 23/24, the Council increased the fees to ensure the charges aligned to our current emission-based policy in place on adopted roads with the 38 Housing Estates.

Consideration was given to socio-economic factors in determining the fee structure and to reduce the impact on Housing Estate residents. Therefore, it is proposed the Council continues to honour the rate of 50% discount of an On-Street Resident Permit across all emission bands. We are also proposing a transition period over 2 years. i.e it will be 25% of the cost in the first year, and 50% in the second year of the operation.

### Housing Estates Visitor Vouchers

We are also proposing that Housing Estate Visitor Vouchers align with On-Street Visitor Vouchers pricing. This will be £2.07 for 1 hour. In line with On-Street residents permits, Housing residents who purchase an annual permit will also receive a virtual book of 10 visitor vouchers.

We are proposing to align the hours of operation of On-Street enforcement to that of Housing Estate enforcement. This will enable visitors to park free after controlled hours, in the evening and weekends. Currently, they have 24-hour enforcement operation.

### Staff Annual Permits/ Daily Vouchers

A uniform increase of 7.7% has been proposed for 2024/25 across all emission banding tariffs. Furthermore, a diesel surcharge will apply to those vehicles not meeting Euro 6 compliance standards, this surcharge will increase from £70 to £75 in 2024/25.

The diesel surcharge for daily vouchers will increase from £2.50 per session to £2.70 per session or per day.

### Lewisham Homes Staff Annual/ Daily Voucher

For FY 24/25, the Lewisham Homes tariff will mirror Lewisham Staff rates.

### Councillors' Permit

A uniform increase of 7.7% has been proposed for 2024/25 across all emission banding tariffs. Furthermore, a diesel surcharge will apply to those vehicles not meeting Euro 6 compliance standards, this surcharge will increase from £70 to £75 in 2024/25.

Diesel surcharge for daily vouchers will increase from £2.50 per session to £2.70 per session or per day. The permit type will still be offered at 80% reduced rate for the councillors.

### Parking Suspension

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The inflationary rates increase of 7.7% will apply to suspension fees. 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. Furthermore, to also deter the use of bays for their intended purposes.

We are proposing an increase from £55 to £60 for Administration Fee, this is in line with the current inflation rate. Furthermore, we are proposing to increase the cost of the fees to be raised for Pay and Display Bays (£50 to £55) and Resident Bays (£55 to £60).

### Short Term Pay-to-Park Fee (Cashless by PayByPhone)

A uniform increase of 7.7% has been proposed for 2024/25 across all emission banding tariffs.

Diesel surcharges will apply, and the surcharge will increase from £2 per session to £2.15 per single transaction. If the parking session is extended before expiry, the surcharge will not apply as this is a continuation parking session. However, if parking is extended after the first session expired, the surcharge will be applied as it is treated as two separate transactions.

The proposed charges in the appendix are shown in hourly rates (pro rata applies). This includes both on-and off-street (car par) in the borough.

#### 5.24. Market Traders

The price for market pitches was raised by 10% in 2023/24 and marked the first price increase for the services since April 2019. As a result, there are currently no proposed increases to the market pitching fees for 2024/25. In order to support the local economy and encourage new local business to start up, a 10% discount is given to traders who trade more than 3 days per week specifically within the Catford Broadway Market. All fees and charges are priced on a discretionary basis with the London Local Authorities Act existing as the legislation to charge.

#### 5.25. Home Ownership Housing

These are the proposed increase in fees and charges for 24/25 relating to the administration of services such as pre assignment packs for leaseholders who are selling, processing retrospective landlords' permission applications and providing copies of leases. All these charges are discretionary. The legislation applicable to the Leases held is the Landlord & Tenant Act 1985.

## 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

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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 2024/25.

### 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.

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:

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<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 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.

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### 11. Further Implications

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

### 12. Report Author and Contact

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[Katharine.nidd@lewisham.gov.uk](mailto:Katharine.nidd@lewisham.gov.uk)

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### Lewisham's Corporate Charging Policy 2024/25

#### 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.
- 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.

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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
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.

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

Full cost recovery	Charges are based on the need to recover the full cost of providing the service, including overheads, <b>from those who use it</b>
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 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.

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### 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 Councils annual inflation rate plus an additional percentage increase should be applied to all fees and charges on an annual basis with effect from 1<sup>st</sup> 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.

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

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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, Acting Director of Finance, [Katharine.Nidd@lewisham.gov.uk](mailto:Katharine.Nidd@lewisham.gov.uk)

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

### 2024/25 PROPOSED CHANGES - CONTENTS

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- LICENSING
- TENNIS COURTS
- LEISURE CENTRES
- COMMUNITY CENTRES
- LIBRARY AND IT SERVICES
- ADULT SOCIAL CARE
- ADULT LEARNING
- BEREAVEMENT
- REGISTER OFFICE
- REVENUES SERVICE
- STREET ENVIRONMENT
- SERVICES
- FORECOURT LICENCES
- BUILDING CONTROL
- PLANNING
- HIGHWAYS
- STREET NAME AND NUMBERING
- PRIVATE SECTOR HOUSING AGENCY
- ENVIRONMENTAL HEALTH
- COMMERCIAL WASTE
- GARDEN WASTE
- PARKING
- MARKET TRADERS

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

### SERVICE: GREEN SCENE

GREEN SCENE	UNIT	Charges 23/24			Proposed charges 24/25				Basis for charging
		Basic (£)	VAT	Total 23/24 (£)	Basic (£)	VAT	Total 24/25	% change	
<b>Pest Control</b>									
Rats Domestic		£63.09	£12.62	£79.50	80.00	16.00	85.50	7.5	Discretionary;
Rats Commercial	From	£132.50	£26.50	£159.00	142.50	28.50	171.00	7.5	Discretionary;
Mice Domestic		£108.16	£21.63	£132.50		0.00	142.50	7.5	Discretionary;
Mice Domestic Concessions		£54.17	£10.83	£66.25		0.00	71.25	7.5	Discretionary;
Mice Commercial	From	£132.50	£26.50	£159.00	142.50	28.50	171.00	7.5	Discretionary;
Cockroaches Domestic		£136.67	£27.33	£165.36		0.00	178.00	7.6	Discretionary;
Cockroaches Domestic Concessions		£68.33	£13.67	£82.68		0.00	89.00	7.6	Discretionary;
Cockroaches Commercial	From	£165.36	£33.07	£198.43	178.00	35.60	213.60	7.6	Discretionary;
Pharaoh Ants Domestic		£136.67	£27.33	£165.36		0.00	178.00	7.6	Discretionary;
Pharaoh Ants Domestic Concessions		£68.33	£13.67	£82.68		0.00	89.00	7.6	Discretionary;
Pharaoh Ants Commercial	From	£165.36	£33.07	£198.43	178.00	35.60	213.60	7.6	Discretionary;
Bed Bugs Domestic		£136.67	£27.33	£165.36		0.00	178.00	7.6	Discretionary;
Bed Bugs Domestic Concessions		£68.33	£13.67	£82.68		0.00	89.00	7.6	Discretionary;
Bed Bugs Commercial	From	£165.36	£33.07	£198.43	178.00	35.60	213.60	7.6	Discretionary;
Fleas Domestic		£108.16	£21.63	£132.50		0.00	142.50	7.5	Discretionary;
Fleas Domestic Concessions		£54.17	£10.83	£66.25		0.00	71.25	7.5	Discretionary;
Fleas Commercial	From	£132.50	£26.50	£159.00	142.50	28.50	171.00	7.5	Discretionary;
Wasps Domestic		£62.50	£12.50	£77.16		0.00	83.00	7.6	Discretionary;
Wasps Domestic Concessions		£54.17	£10.83	£66.14		0.00	71.25	7.7	Discretionary;
Wasps Commercial	From	£77.16	£15.43	£92.59	83.00	16.60	99.60	7.6	Discretionary;
Beetles Domestic		£108.16	£21.63	£132.50		0.00	142.50	7.5	Discretionary;
Beetles Domestic Concessions		£54.17	£10.83	£66.25		0.00	71.25	7.5	Discretionary;
Beetles Commercial	From	£132.50	£26.50	£159.00	142.50	28.50	171.00	7.5	Discretionary;
Garden Ants		£108.16	£21.63	£132.50		0.00	142.50	7.5	Discretionary;

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Garden Ants Concessions		£54.17	£10.83	£66.25		0.00	71.25	7.5	Discretionary;
<b>GREEN SCENE</b>		<b>Charges 23/24</b>			<b>Proposed charges 24/25</b>				
	UNIT	<b>Basic (£)</b>	<b>VAT</b>	<b>Total 23/24 (£)</b>	<b>Basic (£)</b>	<b>VAT</b>	<b>Total 24/25</b>	<b>% change</b>	<b>Basis for charging</b>
Garden Ants Commercial	From	£132.50	£26.50	£159.00	142.50	28.50	171.00	7.5	Discretionary;
Moths Domestic		£108.16	£21.63	£132.50		0.00	142.50	7.5	Discretionary;
Moths Domestic Concessions		£54.17	£10.83	£66.25		0.00	71.25	7.5	Discretionary;
Moths Commercial	From	£132.50	£26.50	£159.00	142.50	28.50	171.00	7.5	Discretionary;
Squirrels Domestic		£162.50	£32.50	£195.00		0.00	210.00	7.7	Discretionary;
Squirrels Commercial	From	£195.00	£39.00	£234.00	210.00	42.00	252.00	7.7	Discretionary;
Call Out Fee Domestic		£65.00	£13.00	£77.16		0.00	83.00	7.6	Discretionary;
Call Out Fee Commercial	From	£77.16	£15.43	£92.59	83.00	16.60	99.60	7.6	Discretionary;
One Of Sprays Domestic		£108.16	£21.63	£132.50		0.00	142.50	7.5	Discretionary;
One Of Sprays Commercial	From	£132.50	£26.50	£159.00	142.50	28.50	171.00	7.5	Discretionary;
<b>Clinical Waste</b>									
Commercial Collections		£60.00	£12.00	£72.00	64.00	12.80	78.00	7.5	Discretionary;
£6.8 per Unit with minimum Collection fee of £54.4		£7.50	£1.50	£9.00	8.00	1.60	9.60	7.5	Discretionary;
<b>Allotments</b>									
Sites without water	Per Rod	£9.49	£ -	£9.49	10.22	0.00	10.22	7.70	Discretionary;
Sites with water	Per Rod	£12.23	£ -	£12.23	13.17	0.00	13.17	7.70	Discretionary;
Sites with locker and toilet facilities	Per Rod	£13.60	£ -	£13.60	14.65	0.00	14.65	7.70	Discretionary;
Sites with shed only	Per Rod	£12.80	£ -	£12.80	13.79	0.00	13.79	7.70	Discretionary;
<b>Nature Conservation</b>									
Birthday hire	per session	£69.00	£ -	£69.00	75.00	0.00	75.00	8.70	Discretionary;
Corporate volunteering	per 10 people	£217.00	£ -	£217.00	250.00	0.00	250.00	15.21	Discretionary;
Hire for LBL schools and academies	per hour	£ -	£ -	£ -	0.00	0.00	0.00	0.00	Discretionary;

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Long-term hire with Building (commercial education organisations in Lewisham)*	per hour	£15.40	£ -	£15.40	17.00	0.00	17.00	10.39	Discretionary;
Long-term hire without Building (commercial education organisations in Lewisham)*	per hour	£10.00	£ -	£10.00	11.00	0.00	11.00	10.00	Discretionary;
<b>GREEN SCENE</b>		<b>Charges 23/24</b>			<b>Proposed charges 24/25</b>				
	UNIT	<b>Basic (£)</b>	<b>VAT</b>	<b>Total 23/24 (£)</b>	<b>Basic (£)</b>	<b>VAT</b>	<b>Total 24/25</b>	<b>% change</b>	<b>Basis for charging</b>
Occasional Hire with Building (commercial education organisations in Lewisham)	per hour	£18.00	£ -	£18.00	20.00	0.00	20.00	11.11	Discretionary;
Occasional Hire without Building (commercial education organisations in Lewisham)	per hour	£13.00	£ -	£13.00	15.00	0.00	15.00	15.38	Discretionary;
Occasional Hire with Building (non- LBL Schools/Academies/fee paying nurseries)	per hour	£21.00	£ -	£21.00	23.00	0.00	23.00	9.52	Discretionary;
Occasional Hire without Building (non-LBL Schools/Academies/fee paying nurseries)	per hour	£18.00	£ -	£18.00	20.00	0.00	20.00	11.11	Discretionary;
Facilitated non-LBL School Session (new)	per class	N/A	N/A	N/A	165.00	0.00	165.00	NA	Discretionary;
Additional LBL school sessions (non-primary)	per class	£217.00	£ -	£217.00	75.00	0.00	75.00	-65.44	Discretionary;
<b>Outdoor hire in Beckenham Place Park</b>									
Commercial events	per person	£2.12	£ -	£2.12	2.27	0.00	2.27	7.1	Discretionary
Community events	per person	£1.06	£ -	£1.06	1.13	0.00	1.13	6.6	Discretionary

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

### SERVICE: ENVIRONMENTAL HEALTH AND ENVIRONMENTAL PROTECTION

Environmental Health and Environmental Protection	UNIT	Charges 23/24			Proposed charges 24/25			% change	Basis for charging
		Basic (£)	VAT	Total 23/24 (£)	Basic (£)	VAT	Total 24/25 (£)		
<b>1. Food Export</b>									
Basic attestation of food premises registration and hygiene standards		171.00	0.00	171.00	184.00	0.00	184.00	7.40	Discretionary
Enhanced including verification or validation of process, storage, and goods		550.00	0.00	550.00	591.00	0.00	591.00	7.40	Discretionary
Full (bespoke to individual consignment and may include charges for sampling etc.)		POA	0.00	POA	POA	0.00	POA	0.00	Discretionary
<b>2. Massage and Special Treatment Licence - new applications</b>									
FULL LICENCE - CLASSES 1, 2 AND 3		350.00	0.00	350.00	385.00	0.00	385.00	10.00	Discretionary
CLASS 1 ONLY		270.00	0.00	270.00	297.00	0.00	297.00	10.00	Discretionary
CLASS 2 ONLY		210.00	0.00	210.00	231.00	0.00	231.00	10.00	Discretionary
CLASS 3 ONLY		180.00	0.00	180.00	198.00	0.00	198.00	10.00	Discretionary
CLASSES 1 & 2 OR 1 & 3		280.00	0.00	280.00	308.00	0.00	308.00	10.00	Discretionary
CLASSES 2 & 3		230.00	0.00	230.00	253.00	0.00	253.00	10.00	Discretionary
BODY PIERCING		190.00	0.00	190.00	209.00	0.00	209.00	10.00	Discretionary
TATTOOING		190.00	0.00	190.00	209.00	0.00	209.00	10.00	Discretionary
IPL		480.00	0.00	480.00	528.00	0.00	528.00	10.00	Discretionary
RENEWAL=100% of application fee									Discretionary

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TRANSFER AND/OR VARIATION=25% of application fee									Discretionary
		<b>Charges 23/24</b>			<b>Proposed charges 24/25</b>				
<b>Environmental Health and Environmental Protection</b>	UNIT	<b>Basic (£)</b>	<b>VAT</b>	<b>Total 23/24 (£)</b>	<b>Basic (£)</b>	<b>VAT</b>	<b>Total 24/25 (£)</b>	<b>% change</b>	<b>Basis for charging</b>
<b>3. Zoo Licensing</b>									
New application		640.00	0.00	640.00	704.00	0.00	704.00	10.00	Discretionary
Renewal		640.00	0.00	640.00	704.00	0.00	704.00	10.00	Discretionary
Copy of Licence		10.50	0.00	10.50	11.50	0.00	11.50	9.52	Discretionary
<b>4. Application Fees for Environmental Permits</b>									
Standard Process		1,650.00	0.00	1,650.00	1,650.00	0.00	1,650.00	0.00	Statutory
Addition fee for operation without a permit		1,188.00	0.00	1,188.00	1,188.00	0.00	1,188.00	0.00	Statutory
Reduced fee activities		155.00	0.00	155.00	155.00	0.00	155.00	0.00	Statutory
PVR I & II combined		257.00	0.00	257.00	257.00	0.00	257.00	0.00	Statutory
Vehicle refinishers (VRs) and other reduced fee activities*		362.00	0.00	362.00	362.00	0.00	362.00	0.00	Statutory
Reduced fee activities: Additional fee for operating with a permit		71.00	0.00	71.00	71.00	0.00	71.00	0.00	Statutory
Mobile plant (e.g screening and crushing/cement batching etc)		1,650.00	0.00	1,650.00	1,650.00	0.00	1,650.00	0.00	Statutory
For third to seventh applications		985.00	0.00	985.00	985.00	0.00	985.00	0.00	Statutory
For the eighth and subsequent applications		498.00	0.00	498.00	498.00	0.00	498.00	0.00	Statutory
* Where an application for any of the above is for a combined Part B and waste application, please add an extra £297 to the above amounts									

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

<b>5. Annual subsistence charge 2023 - 2024 (Process Fees)</b>									
Standard process low		72.00	0.00	772.00	72.00	0.00	772.00	0.00	Statutory
Standard process medium		1,161.00	0.00	1,161.00	1,161.00	0.00	1,161.00	0.00	Statutory
Standard process high		1,747.00	0.00	1,747.00	1,747.00	0.00	1,747.00	0.00	Statutory
<b>5a. Reduced fee activities</b>									
		<b>Charges 23/24</b>			<b>Proposed charges 24/25</b>				
<b>Environmental Health and Environmental Protection</b>	UNIT	<b>Basic (£)</b>	<b>VAT</b>	<b>Total 23/24 (£)</b>	<b>Basic (£)</b>	<b>VAT</b>	<b>Total 24/25 (£)</b>	<b>% change</b>	<b>Basis for charging</b>
Low		79.00	0.00	79.00	79.00	0.00	79.00	0.00	Statutory
Medium		158.00	0.00	158.00	158.00	0.00	158.00	0.00	Statutory
High		237.00	0.00	237.00	237.00	0.00	237.00	0.00	Statutory
<b>5b. PVR I &amp; II combined</b>									
Low		113.00	0.00	113.00	113.00	0.00	113.00	0.00	Statutory
Medium		226.00	0.00	226.00	226.00	0.00	226.00	0.00	Statutory
High		341.00	0.00	341.00	341.00	0.00	341.00	0.00	Statutory
<b>5c. Vehicle refinishers</b>									
Low		228.00	0.00	228.00	228.00	0.00	228.00	0.00	Statutory
Medium		365.00	0.00	365.00	365.00	0.00	365.00	0.00	Statutory
High		548.00	0.00	548.00	548.00	0.00	548.00	0.00	Statutory
<b>5d. Mobile screening and crushing plant for 1st and 2nd permits</b>									
Low		626.00	0.00	626.00	626.00	0.00	626.00	0.00	Statutory
Medium		1,034.00	0.00	1,034.00	1,034.00	0.00	1,034.00	0.00	Statutory
High		1,551.00	0.00	1,551.00	1,551.00	0.00	1,551.00	0.00	Statutory
<b>5e. For the third to seventh permits</b>									
Low		385.00	0.00	385.00	385.00	0.00	385.00	0.00	Statutory
Medium		617.00	0.00	617.00	617.00	0.00	617.00	0.00	Statutory
High		924.00	0.00	924.00	924.00	0.00	924.00	0.00	Statutory

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

<b>6. Transfer and surrender 2023-24 (Process Fees)</b>									
Standard process transfer		169.00	0.00	169.00	169.00	0.00	169.00	0.00	Statutory
Standard process partial transfer		497.00	0.00	497.00	497.00	0.00	497.00	0.00	Statutory
New operator at low risk reduced fee activity		75.00	0.00	75.00	75.00	0.00	75.00	0.00	Statutory
Reduced fee activities: Transfer		0.00	0.00	0.00	0.00	0.00	0.00	0.00	Statutory
Reduced fee activities: Partial transfer		47.00	0.00	47.00	47.00	0.00	47.00	0.00	Statutory
		<b>Charges 23/24</b>			<b>Proposed charges 24/25</b>				
<b>Environmental Health and Environmental Protection</b>	UNIT	<b>Basic (£)</b>	<b>VAT</b>	<b>Total 23/24 (£)</b>	<b>Basic (£)</b>	<b>VAT</b>	<b>Total 24/25 (£)</b>	<b>% change</b>	<b>Basis for charging</b>
<b>7. Late payment fees for Environmental Permits and Annual subsistence charges.</b>		52.00	0.00	52.00	52.00	0.00	52.00	0.00	Statutory

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

### SERVICE: LEISURE CENTRES

1Life Downham Health and Leisure Centres	UNIT	Proposed charges 23/24			Proposed charges 24/25				Basis for charging
		Basic	VAT	Total 23/24	Basic	VAT	Total 24/25	% change	
<b>1 Area Hire</b>									
1.1 Community Hall (Schools, club/group, voluntary)		27	0	27	27	0	30	11.1	Discretionary;
<b>3.1 Life Gym</b>									
3.1 Be Active gym session		4.25	0	4.25	4.25	0	4.25	0	Discretionary;
3.2 Junior Session		3.5	0	3.5	3.5	0	3.5	0	Discretionary;
3.3 Fitness Session (1 hour)		6.75	0	6.75	6.75	0	6.75	0	Discretionary;
3.4 60+ session gym session Be Active		4.1	0	4.1	4.1	0	4.1	0	Discretionary;
3.5 Junior / Be Active Induction		3.65	0	3.65	3.65	0	3.65	0	Discretionary;
<b>4 Group Exercise Classes</b>									
4.1 Aerobics / Step etc		6.5	0	6.5	6.5	0	6.5	0	Discretionary;
4.2 Aqua Zumba		6.5	0	6.5	6.5	0	6.5	0	Discretionary;
4.3 Aqua Aerobics		6.5	0	6.5	6.5	0	6.5	0	Discretionary;
4.4 GP referral aqua session		4.25	0	4.25	4.25	0	4.25	0	Discretionary;
4.5 GP referral fitness class		4.25	0	4.25	4.25	0	4.25	0	Discretionary;
4.6 GP referral gym session		4.25	0	4.25	4.25	0	4.25	0	Discretionary;
<b>5 Swimming</b>									
5.1 Junior U16 Swim		3.25	0	3.25	3.25	0	3.5	7.7	Discretionary;
5.2 Junior U16 holidays Swim - Lewisham residents only in holiday		0	0	0	0	0	0	0	Discretionary;

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

5.3 Adult Swim		4.5	0	4.5	4.5	0	5	11.1	Discretionary;
<b>1Life Downham Health and Leisure Centres</b>		<b>Proposed charges 23/24</b>			<b>Proposed charges 24/25</b>				
	UNIT	<b>Basic</b>	<b>VAT</b>	<b>Total 23/24</b>	<b>Basic</b>	<b>VAT</b>	<b>Total 24/25</b>	<b>% change</b>	<b>Basis for charging</b>
5.4 Under 5's		0	0	0	0	0	0	0	Discretionary;
5.5 Family Swim		11.85	0	11.85	11.85	0	11.85	0	Discretionary;
5.7 60+ Swim (BeActive)		3.15	0	3.15	3.15	0	3.4	7.9	Discretionary;
<b>6 Main Pool Hire</b>									
6.1 LBL Swim Club Main Pool		39.5	0	39.5	39.5	0	40	1.3	Discretionary;
6.2 LBL Swim Club out of Main Pool		58	0	58	58	0	60	3.4	Discretionary;
6.3 Non LBL Swim Club Main Pool		82	0	82	82	0	82	0	Discretionary;
6.4 LBL Swim Club Teaching Pool		21	0	21	21	0	22.5	7.1	Discretionary;
6.5 Non LBL Swim Club Teaching Pool		42	0	42	42	0	45	7.1	Discretionary;
<b>7 Swimming Lesson Direct Debits</b>									
7.1 Junior Swimming lesson monthly DD - 50wks 45 minutes		39	0	39	39	0	40	2.6	Discretionary;
7.2 Junior Swimming lesson monthly DD - 50wks 30 minutes		34.5	0	34.5	34.5	0	36	4.3	Discretionary;
7.3 Adult Swimming lesson monthly DD - 50wks 30 minutes		34.5	0	34.5	34.5	0	34	-1.4	Discretionary;
7.4 Swim Adult 121 30 minute DD		89.99	0	89.99	90	0	91	1.1	Discretionary;
7.5 Swim Adult 221 30 minute DD		67.99	0	67.99	68	0	69	1.5	Discretionary;
7.6 Jnr 121 30 minute DD		89.99	0	89.99	90	0	91	1.1	Discretionary;
7.7 Swim Jnr 221 30 minute DD		67.99	0	67.99	68	0	69	1.5	Discretionary;
7.8 Swim Jnr 121 45 minute DD		160	0	160	160	0	161	0.6	Discretionary;

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

<b>9 AstroTurf</b>									
9.1 Astroturf With Flood Lights 7-aside		50	0	50	50	0	52	4	Discretionary;
<b>1Life Downham Health and Leisure Centres</b>		<b>Proposed charges 23/24</b>			<b>Proposed charges 24/25</b>				
	UNIT	<b>Basic</b>	<b>VAT</b>	<b>Total 23/24</b>	<b>Basic</b>	<b>VAT</b>	<b>Total 24/25</b>	<b>% change</b>	<b>Basis for charging</b>
9.2 Astroturf Without Flood Lights 7-aside		38.5	0	38.5	38.5	0	41	6.5	Discretionary;
<b>10 Badminton</b>									
10.1 Badminton		15	0	15	15	0	15	0	Discretionary;
<b>11 Memberships</b>									
11.1 Memberships Admin Fee		30	0	30	30	0	30	0	Discretionary;
11.2 12 month direct debit membership Annual		359.9	0	359.9	359.9	0	360	0	Discretionary;
11.3 Corporate membership			0						
11.4 1Life Plus Membership		30.99	0	30.99	30.99	0	30.99	0	Discretionary
11.5 In Centre Membership		35.99	0	35.99	35.99	0	35.99	0	Discretionary
11.6 Swim monthly ticket		21.99	0	21.99	21.99	0	21.99	0	Discretionary
11.7 Active 1 month Concession		28.35	0	28.35	28.35	0	28.35	0	Discretionary
11.8 Active 1 month Junior		21	0	21	21	0	21	0	Discretionary
11.9 Active 3 month GP Ref DD		20.99	0	20.99	20.99	0	20.99	0	Discretionary
<b>12 Lowerfields</b>									
12.1 Lower Fields 11 a side (90 minutes) hire		100	0	100	100	0	110	10.0	Discretionary
12.2 Mini Soccer (per game)		48.5	0	48.5	48.5	0	52	7.2	Discretionary
<b>13 Trampoline &amp; Mermaid Direct Debit</b>									
13.1 Trampolining (45 min lesson) DD Monthly		24.99	0	24.99	25	0	26	4	Discretionary

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

Trampolining (60 min lesson) DD Monthly		31.5	0	31.5	31.5	0	33	4.8	Discretionary
Mermaid Swimming (45 min lesson) DD Monthly		38	0	38				0	Discretionary
<b>1Life Downham Health and Leisure Centres</b>		<b>Proposed charges 23/24</b>			<b>Proposed charges 24/25</b>				
	UNIT	Basic	VAT	Total 23/24	Basic	VAT	Total 24/25	% change	Basis for charging
<b>15 Children's Parties</b>									
15.1 Soft play party (25 children)		145	0	145	145	0	145	0	Discretionary
15.2 Disco party (25 children)		145	0	145	145	0	155	6.9	Discretionary
15.3 Pool party (12 children)		145	0	145	145	0	155	6.9	Discretionary
15.4 Pool party (24 children)		175	0	175	175	0	175	0	Discretionary
15.5 Multi Sports party (15 children)		145	0	145	145	0	150	3.4	Discretionary
15.6 Mini activities party 3+ (12 children)		135	0	135	135	0	135	0	Discretionary
15.7 Roller skating party (20 children)		145	0	145	145	0	145	0	Discretionary
15.8 Bouncy Castle party (25 children)		145	0	145	145	0	145	0	Discretionary
15.9 Pool inflatable party (25 children)		220	0	220	220	0	220	0	Discretionary
15.10 Football party (15 children)		160	0	160	160	0	160	0	Discretionary
15.11 Swim with a mermaid party (12 children)		195	0	195	195	0	195	0	Discretionary
15.12 Princess party (25 children)		195	0	195	195	0	195	0	Discretionary
15.13 Dance party (25 children)		195	0	195	195	0	195	0	Discretionary
15.14 Additional hour after in own room		45	0	45	45	0	47	4.4	Discretionary
15.15 Additional hour after in café		28	0	28	28	0	30	7.1	Discretionary
<b>16 Studio Hire</b>									Discretionary

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

16.1 Multi Purpose and Fitness Studio Hire		45	0	45	45	0	47	4.4	Discretionary
16.2 Fitness Studio Hire		38	0	38	38	0	40	5.3	Discretionary
16.3 Multi Purpose Studio Hire		31	0	31	31	0	32	3.2	Discretionary

### SERVICE: GLL LEISURE CENTRES

GLL Leisure Centres	UNIT	Charges 23/24			Proposed charges 24/25			% change	Basis for charging
		Basic (£)	VAT	GLL Proposed prices	Basic	VAT	Total 23/24		
<b>Gym Adult - Non member</b>		7.60		7.60	<b>7.60</b>	<b>8.13</b>	<b>8.15</b>	<b>7.2</b>	
Gym Adult - Pay and Play resident		6.90		6.90	6.90	7.38	7.40	7.2	
Gym Adult - Senior (60+)/concession		4.55		4.55	4.55	4.87	4.85	6.6	
<b>Gym Junior - Non member</b>		4.95		4.95	4.95	5.30	5.30	7.1	
Gym Junior - Pay and Play resident		4.50		4.50	4.50	4.82	4.80	6.7	
Gym Junior - concession		2.95		2.95	2.95	3.16	3.15	6.8	
Gym Adult disability									
<b>Swimming Adult - Non member</b>		5.30		5.30	5.30	5.67	5.65	6.6	
Swimming Adult - Pay and Play resident		4.80		4.80	4.80	5.14	5.15	7.3	
Swimming Adult - Senior (60+)/concession		3.20		3.20	3.20	3.42	3.40	6.3	
<b>Swimming Junior - Non member</b>		2.95		2.95	2.95	3.16	3.15	6.8	
Swimming Junior - Pay and Play resident		2.70		2.70	2.70	2.89	2.90	7.4	
Swimming Junior - concession		1.80		1.80	1.80	1.93	1.95	8.3	
Swimming Adult disability									
Aqua Splash - Adult		6.45		6.45	6.45	6.90	6.90	7	

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

Aqua Splash - Adult - Be Active Conc		4.45		4.45	4.45	4.76	4.75	6.7	
Aqua Splash - Junior		4.50		4.50	4.50	4.82	4.80	6.7	
<b>Junior Fitness classes - non member</b>		4.95		4.95	4.95	5.30	5.30	7.1	
Junior Fitness classes- Pay and Play resident		4.50		4.50	4.50	4.82	4.80	6.7	
Junior Fitness classes- concession		2.95		2.95	2.95	3.16	3.15	6.8	
		<b>Charges 23/24</b>			<b>Proposed charges 24/25</b>				
<b>GLL Leisure Centres</b>	UNIT	<b>Basic (£)</b>	<b>VAT</b>	<b>GLL Proposed prices</b>	<b>Basic</b>	<b>VAT</b>	<b>Total 23/24</b>	<b>% change</b>	<b>Basis for charging</b>
<b>Aerobics classes (Not Aqua or Spin) Adult - Non member</b>		6.90		6.90	6.90	7.38	7.40	7.2	
Aerobics classes (Not Aqua or Spin) Adult - Pay and Play resident		5.85		5.85	5.85	6.26	6.25	6.8	
Aerobics classes (Not Aqua or Spin) Adult - Senior (60+)/concession		4.15		4.15	4.15	4.44	4.45	7.2	
<b>Aerobics classes (Spin) Adult - Non member</b>		8.20		8.20	8.20	8.77	8.75	6.7	
Aerobics classes (Spin) Adult - Pay and Play resident		5.85		5.85	5.85	6.26	6.25	6.8	
Aerobics classes (Spin) Adult - Senior (60+)/concession		4.95		4.95	4.95	5.30	5.30	7.1	
<b>Aerobics classes (Aqua) Adult - Non member</b>		5.85		5.85	5.85	6.26	6.25	6.8	
Aerobics classes (Aqua) Adult - Pay and Play resident		5.30		5.30	5.30	5.67	5.65	6.6	
Aerobics classes (Aqua) Adult - Senior (60+)/concession		4.15		4.15	4.15	4.44	4.45	7.2	
<b>Softplay - Under 2's x1</b>		2.15		2.15	2.15	2.30	2.30	7	
Softplay - Under 2's x2		4.30		4.30	4.30	4.60	4.60	7	
Softplay - Under 2's + 1x over 2		8.10		8.10	8.10	8.67	8.65	6.8	
<b>Softplay - Over 2's x1</b>		5.95		5.95	5.95	6.37	6.35	6.7	

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

Softplay - Over 2's x2		11.90		11.90	11.90	12.73	12.75	7.1	
Softplay - 1x additional adult		5.95		5.95	5.95	6.37	6.35	6.7	
25m Pool - Club Hire Exclusive use Forest Hill Pools & Wavelengths		126.00		126.00	126.00	134.82	134.80	7	
25m Pool - Club Hire Exclusive use Glass Mill		168.00		168.00	168.00	179.76	179.75	7	
25m Pool - Club Hire Per lane		21.00		21.00	21.00	22.47	22.45	6.9	
		<b>Charges 23/24</b>			<b>Proposed charges 24/25</b>				
<b>GLL Leisure Centres</b>	<b>UNIT</b>	<b>Basic (£)</b>	<b>VAT</b>	<b>GLL Proposed prices</b>	<b>Basic</b>	<b>VAT</b>	<b>Total 23/24</b>	<b>% change</b>	<b>Basis for charging</b>
25m Pool - Saxon Crown / Existing hirers with low prices		46.20		46.20	46.20	49.43	49.45	7	
25m Pool - Saxon Crown per lane		13.15		13.15	13.15	14.07	14.00	7.1	
25m Pool - Gala		157.50		157.50	157.50	168.53	168.55	7	
25m Pool - Gala - Saxon Crown		105.00		105.00	105.00	112.35	112.35	7	
Gala - out of hours Saxon Crown		157.50		157.50	157.50	168.53	168.55	7	
Gala - out of hours		210.00		210.00	210.00	224.70	224.70	7	
25m Pool Party		210.00		210.00	210.00	224.70	224.70	7	
Leisure Pool - Party Wavelengths		270.40		270.40	270.40	289.33	289.35	7	
School Lessons 2 week block		1,575.00		1,575.00	1,575.00	1,685.25	1,685.25	7	
School Lessons 2 week block + additional pool usage		1,837.50		1,837.50	1,837.50	1,966.13	1,966.15	7	
Learner Pool - Glass Mill & Forest Hill Pools		105.00		105.00	105.00	112.35	112.35	7	
Small Studio		36.75		36.75	36.75	39.32	39.30	6.9	
Large Studio		47.25		47.25	47.25	50.56	50.55	7	
Forest Hill Pool community room		53.00		53.00	53.00	56.71	56.70	7	

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

Bellingham -Meeting Room		36.75		36.75	36.75	39.32	39.30	6.9	
3G pitch 7 a side / two 5 a sides Floodlit		80.25		80.25	80.25	85.87	85.85	7	
3 grass pitches 11 a side - no floodlight 100m x 60		149.80		149.80	149.80	160.29	160.30	7	
3 grass pitches 11 a side - no floodlight 90m x 50		128.40		128.40	128.40	137.39	137.40	7	
Ladywell Arena Football clubs - Floodlit per game		160.50		160.50	160.50	171.74	171.75	7	
Ladywell Arena Football clubs - no lights per game		123.05		123.05	123.05	131.66	131.65	7	
		<b>Charges 23/24</b>			<b>Proposed charges 24/25</b>				
<b>GLL Leisure Centres</b>									
	UNIT	Basic (£)	VAT	GLL Proposed prices	Basic	VAT	Total 23/24	% change	Basis for charging
Ladywell Arena track - Adult (NR) drop in		3.15		3.15	3.15	3.37	3.35	6.3	
Ladywell Arena track - Adult (Res) drop in		2.85		2.85	2.85	3.05	3.05	7	
Ladywell Arena track - Junior (U16) drop in		1.35		1.35	1.35	1.44	1.45	7.4	
<b>Swimming lessons</b>									
Swim School DD Junior		32.40		32.40	32.40	34.67	34.65	6.9	
Swim School DD Swimbies		41.05		41.05	41.05	43.92	43.90	6.9	
Swim School DD Adult		43.20		43.20	43.20	46.22	46.20	6.9	
1-2-1 Swimming lessons		32.40		32.40	32.40	34.67	34.65	6.9	
Crash courses		38.90		38.90	38.90	41.62	41.60	6.9	
<b>Memberships</b>									
Be Active Adult (concessionary)		32.05		32.05	32.05	34.29	34.30	7	
Be Active Adult (Senior 60+)		32.05		32.05	32.05	34.29	34.30	7	
Better Heath Resident (borough wide)		48.10		48.10	48.10	51.46	51.45	7	
Better Heath Non resident (borough wide)		58.80		58.80	58.80	62.91	62.90	7	

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

Better Health Resident (Centre only)		42.75		42.75	42.75	45.74	45.75	7	
Junior DD price		21.35		21.35	21.35	22.84	22.85	7	
Student/LBL council price		36.06		36.06	36.06	38.58	38.60	7	
Corporate price		42.75		42.75	42.75	45.74	45.75	7	
Bellingham Centre only DD - Peak		26.70		26.70	26.70	28.57	28.55	6.9	
Bellingham Centre only DD - Off Peak & Concession		21.35		21.35	21.35	22.84	22.85	7	
Be Active Adult (concessionary) - annual		320.47		320.47	320.47	342.90	342.90	7	
		<b>Charges 23/24</b>			<b>Proposed charges 24/25</b>				
<b>GLL Leisure Centres</b>									
	UNIT	Basic (£)	VAT	GLL Proposed prices	Basic	VAT	Total 23/24	% change	Basis for charging
Be Active Adult (Senior 60+) - annual		320.47		320.47	320.47	342.90	342.90	7	
Better Heath Resident (borough wide) - annual		480.97		480.97	480.97	514.63	514.65	7	
Better Heath Non resident (borough wide) - annual		587.97		587.97	587.97	629.12	629.10	7	
Better Health Resident (Centre only) - annual		427.47		427.47	427.47	457.39	457.40	7	
Junior DD price - annual		213.47		213.47	213.47	228.41	228.40	7	
Student/LBL council price - annual		360.59		360.59	360.59	385.83	385.85	7	
Corporate price - annual		427.47		427.47	427.47	457.39	457.40	7	
Bellingham Centre only DD - Peak - annual		266.97		266.97	266.97	285.65	285.65	7	
Bellingham Centre only DD - Off Peak & Concession - annual		213.47		213.47	213.47	228.41	228.40	7	
<b>Waves/GMLC Health suite</b>									
Adult Resident		6.85		6.85	6.85	7.33	7.35	7.3	
60+ /Disabled		3.70		3.70	3.70	3.96	3.95	6.8	
Adult Non resident		9.45		9.45	9.45	10.11	10.10	6.9	

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

Birthday Parties - Pool		216.00		216.00	216.00	231.12	231.10	7	
Birthday Parties - Softplay		162.00		162.00	162.00	173.34	173.35	7	
Birthday Parties - Softplay exclusive		729.00		729.00	729.00	780.03	780.05	7	
Club Lewisham table tennis		3.15		3.15	3.15	3.37	3.35	6.3	
<b>Gym Inductions</b>									
Junior		15.90		15.90	15.90	17.01	17.00	6.9	
Basic induction (30 mins)		15.90		15.90	15.90	17.01	17.00	6.9	
Total inductions (60 mins)		21.20		21.20	21.20	22.68	22.70	7.1	
		<b>Charges 23/24</b>			<b>Proposed charges 24/25</b>				
<b>GLL Leisure Centres</b>									
	UNIT	Basic (£)	VAT	GLL Proposed prices	Basic	VAT	Total 23/24	% change	Basis for charging
Re-Focus session		10.60		10.60	10.60	11.34	11.35	7.1	
Give it a Go - off peak		26.50		26.50	26.50	28.36	28.35	7	
Give it a Go - peak		31.80		31.80	31.80	34.03	34.05	7.1	

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

### SERVICE: STREET ENVIRONMENT SERVICES

STREET ENVIRONMENTAL SERVICES	UNIT	Charges 23/24			Proposed charges 24/25			% change	Basis for charging
		Basic (£)	VAT	Total 23/24 (£)	Basic (£)	VAT	Total 24/25 (£)		
<b>1. Street Environment Services charges for waste collection and disposal</b>									
Mattress collection	Per mattress	14.00	0.00	14.00	15.08	0.00	15.00	7.1	Discretionary
Bulky waste collection	Per 4 items	41.00	0.00	41.00	44.16	0.00	45.00	9.8	Discretionary
Fridge/freezer collection	Per fridge	60.00	0.00	60.00	64.62	0.00	65.00	8.3	Discretionary
Bin hire for managing agents	Per bin	4.00	0.00	4.00	6.00	0.00	6.00	50.0	Traded
<b>2. Street Environment Services charges for replacement containers</b>									
Bin delivery charge (Recycling - for individual households)	Per bin	30.00	0.00	30.00	32.31	0.00	33.00	10.0	Discretionary
Bin delivery Charge (Refuse - for individual households)	Per bin	30.00	0.00	30.00	32.31	0.00	33.00	10.0	Discretionary

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

### SERVICE: FORECOURT LICENCES

Forecourt Licences	UNIT	Charges 23/24			Proposed charges 24/25			% change	Basis for charging
		Basic (£)	VAT	Total 23/24 (£)	Basic (£)	VAT	Total 24/25 (£)		
Forecourt Licence Charges per Square Metre		6.66	0.00	6.66	6.66	0.00	6.66	0%	Discretionary
Forecourt Licence/ Renewal Fee		36.30	0.00	36.30	36.30	0.00	36.30	0%	Discretionary
Forecourt Licence Alteration Fee		36.30	0.00	36.30	36.30	0.00	36.30	0%	Discretionary
Forecourt Licence Replacement Fee		6.60	0.00	6.60	6.60	0.00	6.60	0%	Discretionary
Fast Track Forecourt Licence (48 HOURS)		66.00	0.00	66.00	66.00	0.00	66.00	0%	Discretionary
Arrears Letter		5.50	0.00	5.50	5.50	0.00	5.50	0%	Discretionary
Revocation Letter		11.00	0.00	11.00	11.00	0.00	11.00	0%	Discretionary

### SERVICE: GARDEN WASTE

Garden Waste Collection Services	UNIT	Charges 23/24			Proposed charges 24/25			% change	Basis for charging
		Basic (£)	VAT	Total 23/24 (£)	Basic (£)	VAT	Total 24/25 (£)		
Garden Waste	Per Bin	93.50	0.00	93.50	93.50	0.00	93.50	0.0	Statutory
Processing fee for replacement bins	240Litre Bin	30.00	0.00	30.00	30.00	0.00	30.00	0.0	Statutory
Annual Subscription (direct debit)	Annual				90.00	0.00	90.00	0.0	Statutory

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

### SERVICE: BUILDING CONTROL

Building Control	UNIT	Proposed charges 23/24			Proposed charges 24/25				Basis for charging
		Basic (£)	VAT	Total 23/24 (£)	Basic (£)	VAT	Total 24/25 (£)	% Change	
<b>Domestic Extensions - not more than 2 storeys high</b>									Discretionary - Figures rounded for simplicity
Floor area not exceeding 6m2		450.00	90.00	540.00	484.65	96.93	581.00	7.6	Discretionary - Figures rounded for simplicity
6m2 and under 40m2		650.00	130.00	780.00	700.05	140.01	840.00	7.7	Discretionary - Figures rounded for simplicity
40m2 and under 60m2		740.00	148.00	888.00	796.98	159.40	956.00	7.7	Discretionary - Figures rounded for simplicity
Over 60m2 (Charged based on estimated cost of work)									Discretionary - Figures rounded for simplicity
<b>Domestic single family loft conversion</b>									Discretionary - Figures rounded for simplicity
Floor area not exceeding 6m2		550.00	110.00	660.00	592.35	118.47	710.00	7.6	Discretionary - Figures rounded for simplicity
6m2 and under 40m2		650.00	130.00	780.00	700.05	140.01	840.00	7.7	Discretionary - Figures rounded for simplicity
40m2 and under 60m2		795.00	159.00	954.00	856.22	171.24	1027.00	7.7	Discretionary - Figures rounded for simplicity
Over 60m2 (Charged based on estimated cost of work)									Discretionary - Figures rounded for simplicity
<b>Detached garages/outbuildings/carports</b>									Discretionary - Figures rounded for simplicity
Floor area not exceeding 30m2		595.00	119.00	714.00	640.82	128.16	769.00	7.7	Discretionary - Figures rounded for simplicity
Floor area exceeding 30m2 BUT not exceeding 60m2		695.00	139.00	834.00	748.52	149.70	898.00	7.7	Discretionary - Figures rounded for simplicity
Over 60m2 (Charged based on estimated cost of work)									Discretionary - Figures rounded for simplicity
<b>Window replacement (not competent persons)</b>									Discretionary - Figures rounded for simplicity
Estimated cost of work 0-2,000.00		195.00	39.00	234.00	210.02	42.00	252.00	7.7	Discretionary - Figures rounded for simplicity

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**APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)**

Estimated cost of work 2,000 -10,000.00		250.00	50.00	300.00	269.25	53.85	323.00	7.7	Discretionary - Figures rounded for simplicity
		<b>Proposed charges 23/24</b>			<b>Proposed charges 24/25</b>				
<b>Building Control</b>	UNIT	<b>Basic (£)</b>	<b>VAT</b>	<b>Total 23/24 (£)</b>	<b>Basic (£)</b>	<b>VAT</b>	<b>Total 24/25 (£)</b>	<b>% Change</b>	<b>Basis for charging</b>
Over 10,000.00 (Charged by estimated cost of work)									Discretionary - Figures rounded for simplicity
<b>Schedule 2 - Other Works</b>									Discretionary - Figures rounded for simplicity
0-1,000		195.00	39.00	234.00	210.02	42.00	252.00	7.7	Discretionary - Figures rounded for simplicity
1,001-2,000		295.00	59.00	354.00	317.72	63.54	381.00	7.6	Discretionary - Figures rounded for simplicity
2,001-10,000		375.00	75.00	450.00	403.88	80.78	485.00	7.8	Discretionary - Figures rounded for simplicity
10,001-11,000		407.33	81.47	488.80	438.70	87.74	526.00	7.6	Discretionary - Figures rounded for simplicity
11,001-12,000		416.00	83.20	499.20	448.03	89.61	538.00	7.8	Discretionary - Figures rounded for simplicity
12,001-13,000		429.00	85.80	514.80	462.03	92.41	554.00	7.6	Discretionary - Figures rounded for simplicity
13,001-14,000		437.67	87.53	525.20	471.37	94.27	565.00	7.6	Discretionary - Figures rounded for simplicity
14,001-15,000		455.00	91.00	546.00	490.04	98.01	588.00	7.7	Discretionary - Figures rounded for simplicity
15,001-16,000		463.67	92.73	556.40	499.37	99.87	599.00	7.7	Discretionary - Figures rounded for simplicity
16,001-17,000		481.00	96.20	577.20	518.04	103.61	621.00	7.6	Discretionary - Figures rounded for simplicity
17,001-18,000		494.00	98.80	592.80	532.04	106.41	638.00	7.6	Discretionary - Figures rounded for simplicity
18,001-19,000		502.67	100.53	603.20	541.37	108.27	649.00	7.6	Discretionary - Figures rounded for simplicity
19,001-20,000		515.67	103.13	618.80	555.37	111.07	666.00	7.6	Discretionary - Figures rounded for simplicity
20,001-21,000		524.33	104.87	629.20	564.71	112.94	677.00	7.6	Discretionary - Figures rounded for simplicity
21,001-22,000		537.33	107.47	644.80	578.71	115.74	694.00	7.6	Discretionary - Figures rounded for simplicity
22,001-23,000		546.00	109.20	655.20	588.04	117.61	705.00	7.6	Discretionary - Figures rounded for simplicity
23,001-24,000		554.67	110.93	665.60	597.38	119.48	717.00	7.7	Discretionary - Figures rounded for simplicity

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

24,001-25,000		567.67	113.53	681.20	611.38	122.28	733.00	7.6	Discretionary - Figures rounded for simplicity
		<b>Proposed charges 23/24</b>			<b>Proposed charges 24/25</b>				
<b>Building Control</b>	UNIT	<b>Basic (£)</b>	<b>VAT</b>	<b>Total 23/24 (£)</b>	<b>Basic (£)</b>	<b>VAT</b>	<b>Total 24/25 (£)</b>	<b>% Change</b>	<b>Basis for charging</b>
25,001-26,000		580.67	116.13	696.80	625.38	125.08	750.00	7.6	Discretionary - Figures rounded for simplicity
26,001-27,000		589.33	117.87	707.20	634.71	126.94	761.00	7.6	Discretionary - Figures rounded for simplicity
27,001-28,000		598.00	119.60	717.60	644.05	128.81	773.00	7.7	Discretionary - Figures rounded for simplicity
28,001-29,000		606.67	121.33	728.00	653.38	130.68	784.00	7.7	Discretionary - Figures rounded for simplicity
29,001-30,000		615.33	123.07	738.40	662.71	132.54	795.00	7.7	Discretionary - Figures rounded for simplicity
30,001,31,000		628.33	125.67	754.00	676.72	135.34	812.00	7.7	Discretionary - Figures rounded for simplicity
31,001-32,000		637.00	127.40	764.40	686.05	137.21	823.00	7.7	Discretionary - Figures rounded for simplicity
32,001-33,000		650.00	130.00	780.00	700.05	140.01	840.00	7.7	Discretionary - Figures rounded for simplicity
33,001-34,000		658.67	131.73	790.40	709.38	141.88	851.00	7.7	Discretionary - Figures rounded for simplicity
34,001-35,000		671.67	134.33	806.00	723.39	144.68	868.00	7.7	Discretionary - Figures rounded for simplicity
35,001-36,000		680.33	136.07	816.40	732.72	146.54	879.00	7.7	Discretionary - Figures rounded for simplicity
36,001-37,000		693.33	138.67	832.00	746.72	149.34	896.00	7.7	Discretionary - Figures rounded for simplicity
37,001-38,000		702.00	140.40	842.40	756.05	151.21	907.00	7.7	Discretionary - Figures rounded for simplicity
38,001-39,000		715.00	143.00	858.00	770.06	154.01	924.00	7.7	Discretionary - Figures rounded for simplicity
39,001-40,000		723.67	144.73	868.40	779.39	155.88	935.00	7.7	Discretionary - Figures rounded for simplicity
40,001-41,000		736.67	147.33	884.00	793.39	158.68	952.00	7.7	Discretionary - Figures rounded for simplicity
41,001-42,000		741.00	148.20	889.20	798.06	159.61	957.00	7.6	Discretionary - Figures rounded for simplicity
42,001-43,000		754.00	150.80	904.80	812.06	162.41	974.00	7.6	Discretionary - Figures rounded for simplicity

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

43,001-44,000		762.67	152.53	915.20	821.39	164.28	985.00	7.6	Discretionary - Figures rounded for simplicity
44,001-45,000		775.67	155.13	930.80	835.39	167.08	1002.00	7.6	Discretionary - Figures rounded for simplicity
45,001-46,000		784.33	156.87	941.20	844.73	168.95	1013.00	7.6	Discretionary - Figures rounded for simplicity
		<b>Proposed charges 23/24</b>			<b>Proposed charges 24/25</b>				
<b>Building Control</b>	UNIT	<b>Basic (£)</b>	<b>VAT</b>	<b>Total 23/24 (£)</b>	<b>Basic (£)</b>	<b>VAT</b>	<b>Total 24/25 (£)</b>	<b>% Change</b>	<b>Basis for charging</b>
46,001-47,000		797.33	159.47	956.80	858.73	171.75	1030.00	7.7	Discretionary - Figures rounded for simplicity
47,001-48,000		806.00	161.20	967.20	868.06	173.61	1042.00	7.7	Discretionary - Figures rounded for simplicity
48,001-49,000		819.00	163.80	982.80	882.06	176.41	1058.00	7.7	Discretionary - Figures rounded for simplicity
49,001-50,000		827.67	165.53	993.20	891.40	178.28	1070.00	7.7	Discretionary - Figures rounded for simplicity

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**APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)**

**SERVICE: PLANNING**

Planning	UNIT	Charges 23/24			Proposed charges 24/25			% change	Basis for charging
		Basic (£)	VAT 20%	Total 23/24 (£)	Basic (£)	VAT 20%	Total 24/25 (£)		
<b>Operations:</b>									
<b>1. New Developments</b>									
<b>1.1 Outline Applications (calculated on site area)</b>									
1.1.1 Not more than 0.5 hectare	per 0.1 hectare (or part thereof)				£578 per 0.1 hectare (or part thereof)	0.00	£578 per 0.1 hectare (or part thereof)		Statutory Fee
1.1.2 Between 0.5 hectors and 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)	£624 per 0.1 hectare (or part thereof)	0.00	£624 per 0.1 hectare (or part thereof)	35.0	Statutory Fee
1.1.3 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	£15,433 + £186 for each additional 0.1 hectare (or part thereof) in excess of 2.5 hectares Maximum fee of £202,500	0.00	£15,433 + £186 for each additional 0.1 hectare (or part thereof) in excess of 2.5 hectares Maximum fee of £202,500	35.0	Statutory Fee
<b>1.2 Full Applications (and First Submissions of Reserved Matters; or Technical Details Consent)</b>									

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**APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)**

		Charges 23/24			Proposed charges 24/25				
Planning	UNIT	Basic (£)	VAT	Total 23/24 (£)	Basic (£)	VAT	Total 24/25 (£)	% change	Basis for charging
1.2.1 The erection of new dwellinghouses; including the building of new flats; (Total number of new units created is less than 10)	Per dwelling house	£462 per dwellinghouse/flat	0.00	£462 per dwellinghouse/flat	£578 for each dwellinghouse	0.00	£578 for each dwellinghouse	25	
1.2.2 The erection of new dwellinghouses; including the building of new flats; (Between 10 and 50 new units)	Per dwelling house	£462 per dwellinghouse/flat	0.00	£462 per dwellinghouse/flat	£624 for each dwellinghouse	0.00	£624 for each dwellinghouse	35.0	Statutory Fee
1.2.3 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	£30,860 + £186 for each additional dwellinghouse in excess of 50 Maximum fee of £405,000	0.00	£30,860 + £186 for each additional dwellinghouse in excess of 50 Maximum fee of £405,000	35.0	Statutory Fee
1.2.4 Erection of buildings (not dwellinghouses, agricultural, glasshouses, plant nor machinery); where there is <b>no gross floor</b> space created by the development		£234.00	0.00	£234.00	£293.00	0.00	£293.00	25.0	Statutory Fee
1.2.5 Erection of buildings (not dwellinghouses, agricultural, glasshouses, plant nor machinery); where the gross floor space created by the development does not exceed 40 sq m		£234.00	0.00	£234.00	£293.00	0.00	£293.00	25.0	Statutory Fee

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**APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)**

Planning	UNIT	Charges 23/24			Proposed charges 24/25				Basis for charging
		Basic (£)	VAT	Total 23/24 (£)	Basic (£)	VAT	Total 24/25 (£)	% change	
1.2.6 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 1,000 sq m (Prior to 6/12/23 fee was chargeable on 40 - 75 sq m)	75 sq m (or part thereof)	£462.00	0.00	£462.00	£578 for each 75 sq m (or part thereof).	0.00	£578 for each 75 sq m (or part thereof).	25.0	Statutory Fee
1.2.7 Erection of buildings (not dwellinghouses, agricultural, glasshouses, plant nor machinery); where the gross floor space created by the development exceeds 1,000 sq m, but does not exceed 3,750 sq m.	75 sq m (or part thereof)	£462.00	0.00	£462.00	£624 for each 75 sq m (or part thereof)	0.00	£624 for each 75 sq m (or part thereof)	35.0	Statutory Fee
1.2.8 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	£30,680 + £186 for each additional 75 sq m (or part thereof) in excess of 3,750 sq m up to a maximum on £405,000	0.00	£30,680 + £186 for each additional 75 sq m (or part thereof) in excess of 3,750 sq m up to a maximum on £405,000	35.0	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 does not exceed 465 sq m		£96.00	0.00	£96.00	£120.00	0.00	£120.00	25.0	Statutory Fee
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 465 sq m but does not exceed 540 sq m		£462.00	0.00	£462.00	£578.00	0.00	£578.00	25.0	Statutory Fee

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**APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)**

Planning	UNIT	Charges 23/24			Proposed charges 24/25				Basis for charging
		Basic (£)	VAT	Total 23/24 (£)	Basic (£)	VAT	Total 24/25 (£)	% change	
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 540 sq m but does not exceed 1,000 sq m (Prior to 6/12/23 fee was chargeable on 540 - 4,215 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	£578 for first 540 sq m + £578 for each additional 75 sq m in excess of 540 sq m	0.00	£578 for first 540 sq m + £578 for each additional 75 sq m in excess of 540 sq m	25.0	Statutory Fee
1.2.12 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 1,000 sq m but does not exceed 4,215 sq m (Prior to 6/12/23 fee was chargeable on 540 - 4,215 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	£624 for first 1,000 sq m + £624 for each additional 75 sq m in excess of 1,000 sq m	0.00	£624 for first 1,000 sq m + £624 for each additional 75 sq m in excess of 1,000 sq m	35.0	Statutory Fee
1.2.13 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	£30,860 + £186 for each additional 75 sq m (or part thereof) in excess of 4,215 sq m up to a maximum of £405,000	0.00	£30,860 + £186 for each additional 75 sq m (or part thereof) in excess of 4,215 sq m up to a maximum of £405,000	35.0	Statutory Fee
1.2.14 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	£120.00	0.00	£120.00	25.0	Statutory Fee
1.2.15 Erection of glasshouses on land used for the purpose of agriculture; where the gross floor space to be created by the development is more than 465 sq m but not more than 1,000 sq m (Prior to 6/12/23 fee was chargeable on 465 sq m and above)		£2,580.00	0.00	£2,580.00	£3,225.00	0.00	£3,225.00	35.0	Statutory Fee

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**APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)**

Planning	UNIT	Charges 23/24			Proposed charges 24/25				Basis for charging
		Basic (£)	VAT	Total 23/24 (£)	Basic (£)	VAT	Total 24/25 (£)	% change	
1.2.16 Erection of glasshouses on land used for the purpose of agriculture; where the gross floor space to be created by the development exceeds 1,000 sq m		£2,580.00	0.00	£2,580.00	£3,483.00	0.00	£3,483.00	35.0	Statutory Fee
1.2.17 Erection / alterations / replacement of plant and machinery where the site area does not exceed 1 hectare (Prior to 6/12/23 fee was chargeable up to 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)	£578 for each 0.1 hectare (or part thereof)	0.00	£578 for each 0.1 hectare (or part thereof)	25.0	Statutory Fee
1.2.18 Erection / alterations / replacement of plant and machinery where the site area exceeds 1 hectare but is not more than 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)	£624 for each 0.1 hectare (or part thereof)	0.00	£624 for each 0.1 hectare (or part thereof)	35.0	Statutory Fee
1.2.19 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	£30,860 + £186 for each additional 0.1 hectare (or part thereof) in excess of 5 hectares up to a maximum of £405,000	0.00	£30,860 + £186 for each additional 0.1 hectare (or part thereof) in excess of 5 hectares up to a maximum of £405,000	35.0	Statutory Fee
1.2.20 Resubmission within 12 months of the decision date no later than 5/12/2023 (or within 12 month of submitting an application, period starting no later than 5/12/23, 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	0.00	0	0.00	0.00	0.0	Statutory Fee
<b>2. Reserved Matters</b>									

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**APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)**

		Charges 23/24			Proposed charges 24/25				
Planning	UNIT	Basic (£)	VAT	Total 23/24 (£)	Basic (£)	VAT	Total 24/25 (£)	% change	Basis for charging
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	£578.00	0.00	£578.00	25.0	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 of all the reserved matters has NOT already been paid		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	35.0	Statutory Fee
2.3 Resubmission within 12 months of the decision date no later than 5/12/2023 (or within 12 month of submitting an application, period starting no later than 5/12/23, 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	0.00	0	0.00	0.00	0.0	Statutory Fee
<b>3. Existing Dwellinghouses or Flats, including works within boundaries</b>									
3.1 Enlargement, improvement or other alteration of an existing single dwellinghouse or single flat		£206.00	0.00	£206.00	£258.00	0.00	£258.00	25.0	Statutory Fee

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

		Charges 23/24			Proposed charges 24/25				
<b>Planning</b>	UNIT	Basic (£)	VAT	Total 23/24 (£)	Basic (£)	VAT	Total 24/25 (£)	% change	Basis for charging
3.2 Enlargement, improvement or other alteration of existing dwellinghouses or flats (two or more)		£407.00	0.00	£407.00	£509.00	0.00	£509.00	25.0	Statutory Fee
3.3 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 date no later than 5/12/2023 (or within 12 month of submitting an application, period starting no later than 5/12/23, 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	0.00	0	0.00	0.00	0.0	Statutory Fee
<b>4. Applications other than Building Works</b>									
4.1. The construction of car parks, service roads or other accesses, including cross overs / drop curbs for existing uses		£234.00	0.00	£234.00	£293.00	0.00	£293.00	25.0	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)	£316 for each 0.1 hectare (or part thereof)	0.00	£316 for each 0.1 hectare (or part thereof)	35.0	Statutory Fee

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**APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)**

<b>Planning</b>	<b>UNIT</b>	<b>Basic (£)</b>	<b>VAT</b>	<b>Total 23/24 (£)</b>	<b>Basic (£)</b>	<b>VAT</b>	<b>Total 24/25 (£)</b>	<b>% change</b>	<b>Basis for charging</b>
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	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	£47,161 + £186 for each additional 0.1 hectare (or part thereof) in excess of 15 hectares up to a maximum of £105,300	0.00	£47,161 + £186 for each additional 0.1 hectare (or part thereof) in excess of 15 hectares up to a maximum of £105,300	35.0	Statutory Fee
<b>5. Drilling / Mining Operations</b>									
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)	£686 for each 0.1 hectare (or part thereof)	0.00	£686 for each 0.1 hectare (or part thereof)	25.0	Statutory Fee
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	£51,395 + £204 for each additional 0.1 hectare (or part thereof) in excess of 7.5 hectares up to a maximum of £405,000	0.00	£51,395 + £204 for each additional 0.1 hectare (or part thereof) in excess of 7.5 hectares up to a maximum of £405,000	35.0	Statutory Fee

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

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)	£347 per 0.1 hectare (or part thereof)	0.00	£347 per 0.1 hectare (or part thereof)	25.0	Statutory Fee
<b>Planning</b>	<b>UNIT</b>	<b>Basic (£)</b>	<b>VAT</b>	<b>Total 23/24 (£)</b>	<b>Basic (£)</b>	<b>VAT</b>	<b>Total 24/25 (£)</b>	<b>% change</b>	<b>Basis for charging</b>
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	£52,002 + £204 for each additional 0.1 hectare (or part thereof) in excess of 15 hectares up to a maximum of £105,300	0.00	£52,002 + £204 for each additional 0.1 hectare (or part thereof) in excess of 15 hectares up to a maximum of £105,300	35.0	Statutory Fee
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)	£316 per 0.1 hectare (or part thereof)	0.00	£316 per 0.1 hectare (or part thereof)	25.0	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	£47,161 + additional £186 for each 0.1 hectare in excess of 15 hectares up to a maximum of £105,300	0.00	£47,161 + additional £186 for each 0.1 hectare in excess of 15 hectares up to a maximum of £105,300	35.0	Statutory Fee

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

5.7 Other operations (not coming within any of the above categories) (calculated on site area)	per 0.1 hectare (or part thereof)	£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	£293 for each 0.1 hectare (or part thereof) up to a maximum of £2,535	0.00	£293 for each 0.1 hectare (or part thereof) up to a maximum of £2,535	25.0	Statutory Fee
<b>6. Lawful Development Certificate</b>									
<b>Planning</b>	<b>UNIT</b>	<b>Basic (£)</b>	<b>VAT</b>	<b>Total 23/24 (£)</b>	<b>Basic (£)</b>	<b>VAT</b>	<b>Total 24/25 (£)</b>	<b>% change</b>	<b>Basis for charging</b>
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 be the same as Full fee for that use carried out or operation	0.00	Fee will be the same as Full fee for that use carried out or operation	Fee will be the same as Full fee for that use carried out or operation	0.00	Fee will be 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 any other planning fee regulation.		0.00	0.00	0.00	0.00	0.00	0.00	0.0	Statutory Fee
6.3 Lawful Development Certificate - Lawful not to comply with a particular planning condition or limitation. (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	£293.00	0.00	£293.00	25.0	Statutory Fee

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

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		0.00	0.00	0.00	0.00	0.00	0.00	0.0	Statutory Fee
<b>7. Prior Approval</b>									
7.1 Prior approval for permitted development rights for a larger single story home extension		£96.00	0.00	£96.00	£120.00	0.00	£120.00	25.0	Statutory Fee
<b>Planning</b>	UNIT	<b>Basic (£)</b>	<b>VAT</b>	<b>Total 23/24 (£)</b>	<b>Basic (£)</b>	<b>VAT</b>	<b>Total 24/25 (£)</b>	<b>% change</b>	<b>Basis for charging</b>
7.2 Agricultural and Forestry buildings and operations		£96.00	0.00	£96.00	£120.00	0.00	£120.00	25.0	Statutory Fee
7.3 Demolition of buildings		£96.00	0.00	£96.00	£120.00	0.00	£120.00	25.0	Statutory Fee
7.4 Communications (previously referred to as "Telecommunications Code Systems Operators")		£462.00	0.00	£462.00	£578.00	0.00	£578.00	25.0	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)		£96.00	0.00	£96.00	£120.00	0.00	£120.00	25.0	Statutory Fee

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

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 Residential Institutions (Use Class C2A) to a State Funded School		£96.00	0.00	£96.00	£120.00	0.00	£120.00	25.0	Statutory Fee
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	£120.00	0.00	£120.00	25.0	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	£120.00	0.00	£120.00	25.0	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)		£100 for each dwellinghouse	0.00	£100 for each dwellinghouse	£125 for each dwellinghouse	0.00	£125 for each dwellinghouse	25.0	Statutory Fee
<b>Planning</b>	UNIT	<b>Basic (£)</b>	<b>VAT</b>	<b>Total 23/24 (£)</b>	<b>Basic (£)</b>	<b>VAT</b>	<b>Total 24/25 (£)</b>	<b>% change</b>	<b>Basis for charging</b>
7.10 Change of Use of a building and any land within its curtilage from an Agricultural Building to Dwellinghouses (Use Class C3)		£96.00	0.00	£96.00	£120.00	0.00	£120.00	25.0	Statutory Fee
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	£258.00	£120.00	£258.00	25.0	Statutory Fee

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

7.12 Change of Use of a building from Betting Offices, Pay Day Loan Shops, Launderette; a mixed use combining one of these uses and use as a dwellinghouse(s) or Hot Food Takeaway to Dwellinghouses (Use Class C3)		£96.00	0.00	£96.00	£120.00	0.00	£120.00	25.0	Statutory Fee
7.13 Change of Use of a building from Retail (Use Class A1 and A2), Betting Offices, Pay Day Loan Shops, Launderette; or a mixed use combining one of these uses and use as a dwellinghouse(s) or Hot Food Takeaway to Dwellinghouses (Use Class C3); where it includes building operations in connection with the change of use		£206.00	0.00	£206.00	£258.00	0.00	£258.00	25.0	Statutory Fee
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)		£96.00	0.00	£96.00	£120.00	0.00	£120.00	25.0	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		£206.00	0.00	£206.00	£258.00	0.00	£258.00	25.0	Statutory Fee
<b>Planning</b>	UNIT	<b>Basic (£)</b>	<b>VAT</b>	<b>Total 23/24 (£)</b>	<b>Basic (£)</b>	<b>VAT</b>	<b>Total 24/25 (£)</b>	<b>% change</b>	<b>Basis for charging</b>
7.16 Development consisting of the Erection or Construction of a Collection Facility within the curtilage of a Shop		£96.00	0.00	£96.00	£120.00	0.00	£120.00	25.0	Statutory Fee
7.17 Temporary Use of Buildings or Land for Purpose of Commercial Film-Making and the Associated Temporary Structures, Works, Plant or Machinery required in connection with that Use		£96.00	0.00	£96.00	£120.00	0.00	£120.00	25.0	Statutory Fee

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

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		£96.00	0.00	£96.00	£120.00	0.00	£120.00	25.0	Statutory Fee
7.19 Prior approval application (for larger home extensions, additional storeys on a home, or change of use) where a planning application (for which a fee is payable) for the same site is submitted at the same time by or on behalf of the same person		£0.00	0.00	£0.00	£0.00	0.00	£0.00	0.0	Statutory Fee
7.20 Additional stories on a home		£96.00	0.00	£96.00	£120.00	0.00	£120.00	25.0	Statutory Fee
7.21 Construction of new dwelling houses - not more than 10 dwellings	per dwellinghouse	£334.00	0.00	£334.00	£418.00	0.00	£418.00	25.0	Statutory Fee
7.22 Construction of new dwelling houses - between 10 and 50 dwelling houses	per dwellinghouse	£334.00	0.00	£334.00	£451.00	0.00	£451.00	25.0	Statutory Fee
7.23 Construction of new dwelling houses - more than 50 dwelling houses		£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	£22,309 + £135 for each dwelling house in excess of 50. Max fee of £405,000	0.00	£22,309 + £135 for each dwelling house in excess of 50. Max fee of £405,000	35.0	Statutory Fee
7.24 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	120.00	£0.00	£120.00	25.00	Statutory Fee
7.25 Provision of Temporary School Buildings on vacant commercial land and the use of tha land as a state-funded school for up to 3 Academic Years		£96.00	0.00	£96.00	120.00	£0.00	£120.00	25.00	Statutory Fee
7.26 Erection, extension or alteration of a University Building		£96.00	0.00	£96.00	120.00	£0.00	£120.00	25.00	Statutory Fee
<b>Planning</b>	<b>UNIT</b>	<b>Basic (£)</b>	<b>VAT</b>	<b>Total 23/24 (£)</b>	<b>Basic (£)</b>	<b>VAT</b>	<b>Total 24/25 (£)</b>	<b>% change</b>	<b>Basis for charging</b>
7.27 Erection, extension or alteration on a closed defence site by or on behalf of the Crown of single living accommodation and/or non-residential buildings		£96.00	0.00	£96.00	120.00	£0.00	£120.00	25.00	Statutory Fee
<b>8. Approval / variation / discharge of condition</b>									

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

8.1 Application for removal or variation of condition following grant of planning permission	Per Request	£234.00	£0.00	£234.00	£293.00	£0.00	£293.00	25.0	Statutory Fee
8.2 Request to discharge one or more householder planning conditions	Per Request	£34.00	£0.00	£34.00	£43.00	£0.00	£43.00	25.0	Statutory Fee
8.3 Request to discharge one or more non-householder planning conditions	Per Request	£116.00	£0.00	£116.00	£145.00	£0.00	£145.00	25.0	Statutory Fee
8.4 Request to discharge planning conditions on new build developments	Per Request	£116.00	£0.00	£116.00	£145.00	£0.00	£145.00	25.0	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	0.0	Statutory Fee
<b>9. Change of Use</b>									
9.1 Change of use of a building to use as not more than 10 dwellinghouses	Per dwellinghouse	£462.00	0.00	£462.00	£578.00	0.00	£578.00	25.0	Statutory Fee
9.2 Change of use of a building to use as between 10 and 50 separate dwellinghouses	Per dwellinghouse	£462.00	0.00	£462.00	£624.00	0.00	£624.00	35.0	Statutory Fee
9.3 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 + £138 per additional dwellinghouse in excess of 50 up to a maximum of £300,000	£30,860 + £186 for each additional dwellinghouse in excess of 50 up to a maximum of £405,000	0.00	£30,860 + £186 for each additional dwellinghouse in excess of 50 up to a maximum of £405,000	35.0	Statutory Fee
9.4 Other change of use of a building or land		£462.00	0.00	£462.00	£578.00	0.00	£578.00	25.0	Statutory Fee
<b>10.Consent to Display Advertisements</b>									
<b>Planning</b>	UNIT	<b>Basic (£)</b>	<b>VAT</b>	<b>Total 23/24 (£)</b>	<b>Basic (£)</b>	<b>VAT</b>	<b>Total 24/25 (£)</b>	<b>% change</b>	<b>Basis for charging</b>
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	£165.00	0.00	£165.00	25.0	Statutory Fee

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

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 is to be displayed but which are not visible from that site		£132.00	0.00	£132.00	£165.00	0.00	£165.00	25.0	Statutory Fee
10.3 All other advertisements		£462.00	0.00	£462.00	£578.00	0.00	£578.00	25.0	Statutory Fee
10.4 Application for consent to display an advertisement following a withdrawal or refusal of an earlier application (where the relevant period started no later than 5 December 2023) and where the application is made by or on behalf of the same person, same description and same site(s)		£0.00	0.00	£0.00	£0.00	0.00	£0.00	0.0	Statutory Fee
10.5 Application for consent to display an advertisement which results from a direction under Regulation 7 of the Control of Advertisements Regulations 1992, dis-applying deemed consent under Regulation 6 to the proposed advertisement		£0.00	0.00	£0.00	£0.00	0.00	£0.00	0.0	Statutory Fee
<b>11. Application for a Non-material Amendment following a grant of planning permission</b>									
11.1 Applications in respect of householder developments		£34.00	0.00	£34.00	£43.00	0.00	£43.00	25.0	Statutory Fee
11.2 Applications in respect of other developments		£234.00	0.00	£234.00	£293.00	0.00	£293.00	25.0	Statutory Fee
<b>12. Permissions in Principle</b>									
12.1 Application for Permission in Principle	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)	£503 per 0.1 hectare (or part thereof)	0.00	£503 per 0.1 hectare (or part thereof)	25.0	Statutory Fee
<b>Planning</b>	<b>UNIT</b>	<b>Basic (£)</b>	<b>VAT</b>	<b>Total 23/24 (£)</b>	<b>Basic (£)</b>	<b>VAT</b>	<b>Total 24/25 (£)</b>	<b>% change</b>	<b>Basis for charging</b>
<b>13. Listed Buildings</b>									
13.1 Listed Building Consent		0.00	0.00	0.00	0.00	0.00	0.00	0.0	Statutory Fee

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

13.2 Certificate of Lawfulness of Proposed Words to a listed building		0.00	0.00	0.00	0.00	0.00	0.00	0.0	Statutory Fee
13.3 Application relates to condition(s) on an application for Listed Building Consent		0.00	0.00	0.00	0.00	0.00	0.00	0.0	Statutory Fee
13.4 Demolition of a Listed Building		0.00	0.00	0.00	0.00	0.00	0.00	0.0	Statutory Fee
<b>14. Demolition</b>									
14.1 Demolition of unlisted buildings within conservation areas		0.00	0.00	0.00	0.00	0.00	0.00	0.0	Statutory Fee
14.2 Demolition of a Listed Building		0.00	0.00	0.00	0.00	0.00	0.00	0.0	Statutory Fee
<b>15. Trees</b>									
15.1 Works to Trees in Conservation Areas		0.00	0.00	0.00	0.00	0.00	0.00	0.0	Statutory Fee
15.2 Works to Trees covered by Tree Preservation Orders		0.00	0.00	0.00	0.00	0.00	0.00	0.0	Statutory Fee
15.3 Hazardous Trees - 5 day notice		0.00	0.00	0.00	0.00	0.00	0.00	0.0	Statutory Fee
15.4 Tree Preservation Orders		0.00	0.00	0.00	0.00	0.00	0.00	0.0	Statutory Fee
15.5 Hedgerow removal notice		0.00	0.00	0.00	0.00	0.00	0.00	0.0	Statutory Fee
15.6 Request for High Hedge Investigation		0.00	0.00	0.00	600.00	0.20	720.00	720.0	Discretionary
<b>16. Design Review Panel</b>									
16.1 Standard Review (up to and including 50 units) - First Review Meeting		2730.00	0.20	3276.00	2730.00	0.20	3276.00	0.0	Discretionary
16.2 Standard Review (up to and including 50 units) - Subsequent Review Meetings		2194.50	0.20	2633.40	2194.50	0.20	2633.40	0.0	Discretionary
16.3 Standard Review (more than 50 units) - First Review Meeting		4389.00	0.20	5266.80	4389.00	0.20	5266.80	0.0	Discretionary
16.4 Standard Review (more than 50 units) - Subsequent Review Meetings		3843.00	0.20	4611.60	3843.00	0.20	4611.60	0.0	Discretionary
16.5 Premium Review (2.5 hour review) - First Review Meeting		7665.00	0.20	9198.00	7665.00	0.20	9198.00	0.0	Discretionary
16.6 Premium Review (2.5 hour review) - Subsequent Review Meetings		6573.00	0.20	7887.60	6573.00	0.20	7887.60	0.0	Discretionary
<b>Planning</b>	UNIT	<b>Basic (£)</b>	<b>VAT</b>	<b>Total 23/24 (£)</b>	<b>Basic (£)</b>	<b>VAT</b>	<b>Total 24/25 (£)</b>	<b>% change</b>	<b>Basis for charging</b>
16.7 Cancellation of meeting within 28 working days of meeting		546.00	0.20	655.20	573.30	0.20	687.96	5.0	Discretionary

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

16.8 Cancellation of meeting within 10 working days of meeting		1097.25	0.20	1316.70	1152.11	0.20	1382.53	5.0	Discretionary
16.9 Reorganisation of meeting date once meeting has been arranged (per reorganisation at customer request)		210.00	0.20	252.00	2205.00	0.20	2646.0	5.0	Discretionary
<b>17. Planning Advice Services</b>									
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	0.20	63.00	0.0	Discretionary
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	0.20	63.00	0.0	Discretionary
17.1.3 Whether proposed alterations require listed building consent		52.50	0.20	63.00	52.50	0.20	63.00	0.0	Discretionary
17.1.4 Explanation of planning policy, including the evidence needed and how to apply planning policies in general		52.50	0.20	63.00	52.50	0.20	63.00	0.0	Discretionary
17.1.5 Confirmation that a specific planning obligation has been discharged	per obligation	52.50	0.20	63.00	56.18	0.20	67.42	7.0	Discretionary
17.1.6 Confirmation that an identified planning condition has been met	per condition	52.50	0.20	63.00	56.18	0.20	67.42	7.0	Discretionary
17.1.7 Confirmation of compliance that an identified planning enforcement notice has been met		125.00	0.20	150.00	125.00	0.20	150.00	0.0	Discretionary
17.1.8 Confirmation of compliance and withdrawal of Planning Enforcement Notice.		125.00	0.20	150.00	250.00	0.20	300.00	100.0	Discretionary
17.1.19 Formal Confirmation that an Enforcement Case has been closed		41.67	0.20	50.00	41.67	0.20	50.00	0.0	Discretionary
17.2 Duty Planner Standard (15 minute virtual meeting with Planning Officer)	per site	110.50	0.20	132.60	110.50	0.20	132.60	0.0	Discretionary
<b>Planning</b>	UNIT	<b>Basic (£)</b>	<b>VAT</b>	<b>Total 23/24 (£)</b>	<b>Basic (£)</b>	<b>VAT</b>	<b>Total 24/25 (£)</b>	<b>% change</b>	<b>Basis for charging</b>
17.3 Duty Planner Complex (20 minute meeting with Planning Officer)	per site	195.83	0.20	235.00	195.83	0.20	235.00	0.0	Discretionary

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**APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)**

17.4 Duty Planner follow up service - email correspondence only for review of revised drawings post initial advice					50% of relevant Duty Planner fee	0.20	50% of relevant Duty Planner fee		Discretionary
17.5 Written Confirmation if Property is in a Conservation Area.		20.00	0.20	24.00	20.00	0.20	24.00	0.00	Discretionary
17.6 Written Confirmation of existence of Tree Preservation Order on site		20.00	0.20	24.00	20.00	0.20	24.00	0.00	Discretionary
<b>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.</b>									
18.1 Householder Written Advice		390.00	0.20	468.00	390.00	0.20	468.00	0.0	Discretionary
18.2 Householder Written Advice with one-hour meeting on site with conservation officer		560.00	0.20	672.00	560.00	0.20	672.00	0.0	Discretionary
18.3 Householder follow-up advice		170.00	0.20	204.00	170.00	0.20	204.00	0.0	Discretionary
18.4 Non-householder Written Advice		710.00	0.20	852.00	710.00	0.20	852.00	0.0	Discretionary
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	0.20	1242.00		Discretionary
18.6 Non-householder follow-up advice		510.00	0.20	612.00	510.00	0.20	612.00	0.0	Discretionary
<b>19. Pre-application Advice Services</b>									
<b>Planning</b>	UNIT	<b>Basic (£)</b>	<b>VAT</b>	<b>Total 23/24 (£)</b>	<b>Basic (£)</b>	<b>VAT</b>	<b>Total 24/25 (£)</b>	<b>% change</b>	<b>Basis for charging</b>

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**APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)**

19.1 Concept Meeting (30 minute virtual meeting to discuss principle of development and brief written response) on small scale project is acceptable - Single-plot subdivision (conversion of one house into two flats or one plot into two plots or addition of residential annexe)	per meeting	323.75	0.20	388.50	323.75	0.20	388.50	0.0	Discretionary
19.2 Concept Meeting (30 minute virtual meeting to discuss principle of development and brief written response) if minor project is acceptable - All development except that covered in small scale project up to major development.	per meeting	542.50	0.20	651.00	542.50	0.20	651.00	0.0	Discretionary
19.3 Concept Meeting - Major Developments. An internal review at our Major Review Panel, a 1hr virtual meeting and a written response on whether the principle of your "major" project is acceptable.	per meeting	1097.25	0.20	1316.70	1097.25	0.20	1316.70	0.0	Discretionary
19.4 Pre-application Meeting									
19.4.1 Small minor development - A 1hr virtual meeting and a written response on whether the details of your small "minor" project are acceptable and advice on next steps. - First Meeting	per meeting	819.00	0.20	982.80	819.00	0.20	982.80	0.0	Discretionary
19.4.2 Small minor development - Follow-up Meeting (Single Issue)		437.50	0.20	525.00	437.50	0.20	525.00	0.0	Discretionary
19.4.3 Medium minor development - A 1hr virtual meeting and a written response on whether the details of your medium "minor" project are acceptable and advice on next steps - First Meeting	per meeting	1312.50	0.20	1575.00	1312.50	0.20	1575.00	0.0	Discretionary
19.4.4 Medium minor development (2-4 new residential dwellings (including conversion and annexe)) - Follow-up Meeting (Single Issue)		656.25	0.20	787.50	656.25	0.20	787.50	0.0	Discretionary
<b>Planning</b>	UNIT	<b>Basic (£)</b>	<b>VAT</b>	<b>Total 23/24 (£)</b>	<b>Basic (£)</b>	<b>VAT</b>	<b>Total 24/25 (£)</b>	<b>% change</b>	<b>Basis for charging</b>

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

19.4.5 Medium minor development (Change of use from 150 sqm to 500 sqm) A 1hr virtual meeting and a written response on whether the details of your medium "minor" project are acceptable and advice on next steps - First Meeting	per meeting	1312.50	0.20	1575.00	1312.50	0.20	1575.00	0.0	Discretionary
19.4.6 Medium minor development (Change of use from 150 sqm to 500 sqm) - Follow-up Meeting (Single Issue)		656.25	0.20	787.50	656.25	0.20	787.50	0.0	Discretionary
19.4.7 Larger minor development (5-9 new residential dwellings (including conversion)) - First Meeting	Per meeting	1648.50	0.20	1978.20	1648.50	0.20	1978.20	0.0	Discretionary
19.4.8 Larger minor development (5-9 new residential dwellings (including conversion)) - Follow-up Meeting		771.75	0.20	926.10	771.75	0.20	926.10	0.0	Discretionary
19.4.9 Larger minor development (Change of use from 500 sqm to 999 sqm non-residential floor space) - First Meeting	Per meeting	1648.50	0.20	1978.20	1648.50	0.20	1978.20	0.0	Discretionary
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	771.75	0.20	926.10	771.75	0.20	926.10	0.0	Discretionary
19.4.11 Small major development (10-30 new residential dwellings (including conversion)) - First Three Meetings	Per meeting	2625.00	0.20	3150.00	2625.00	0.20	3150.00	0.0	Discretionary
19.4.12 Small major development (10-30 new residential dwellings (including conversion)) - Meeting four onwards	Per meeting	1207.50	0.20	1449.00	1207.50	0.20	1449.00	0.0	Discretionary
19.4.13 Small major development (1,000 - 1,999 sqm non-residential floor space) - First Three Meetings	Per meeting	2625.00	0.20	3150.00	2625.00	0.20	3150.00	0.0	Discretionary
19.4.14 Small major development (1,000 - 1,999 sqm non-residential floor space) - Meeting four onwards	Per meeting	1207.50	0.20	1449.00	1207.50	0.20	1449.00	0.0	Discretionary
19.4.15 Medium major development (31-99 new residential dwellings (including conversion)) - First Three Meetings	Per meeting	3291.75	0.20	3950.10	3291.75	0.20	3950.10	0.0	Discretionary
19.4.16 Medium major development (31-99 new residential dwellings (including conversion)) - Meeting four onwards	Per meeting	1533.00	0.20	1839.60	1533.00	0.20	1839.60	0.0	Discretionary

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

Planning	UNIT	Basic (£)	VAT	Total 23/24 (£)	Basic (£)	VAT	Total 24/25 (£)	% change	Basis for charging
19.4.17 Medium major development (2,000 - 2,999 sqm non-residential floor space) - First Three Meetings	Per meeting	3291.75	0.20	3950.10	3291.75	0.20	3950.10	0.0	Discretionary
19.4.18 Medium major development (2,000 - 2,999 sqm non-residential floor space) - Meeting four onwards	Per meeting	1533.00	0.20	1839.60	1533.00	0.20	1839.60	0.0	Discretionary
19.4.19 Large major development (100-149 new residential dwellings (including conversion) ) First Three Meetings.	Per meeting	4389.00	0.20	5266.80	4389.00	0.20	5266.80	0.0	Discretionary
19.4.20 Large major development (100-149 new residential dwellings (including conversion)) - Meeting four onwards.	Per meeting	1974.00	0.20	2368.80	1974.00	0.20	2368.80	0.0	Discretionary
19.4.21 Large major development (3000 plus sqm non-residential floor space) - First Three Meetings.	Per meeting	4389.00	0.20	5266.80	4389.00	0.20	5266.80	0.0	Discretionary
19.4.22 Large major development (3000 plus sqm non-residential floor space) - Meeting four onwards.	Per meeting	1974.00	0.20	2368.80	1974.00	0.20	2368.80	0.0	Discretionary
19.4.23 Strategic major development (150 and over new residential dwellings (including conversion)) - First Three Meetings.	Per meeting	5486.25	0.20	6583.50	5486.25	0.20	6583.50	0.0	Discretionary
19.4.24 Strategic major development (150 and over new residential dwellings (including conversion)) - Meeting four onwards.	Per meeting	2194.50	0.20	2633.40	2194.50	0.20	2633.40	0.0	Discretionary
19.4.25 Strategic major development (EIA Development) - First Three Meetings	Per hour	5486.25	0.20	6583.50	5486.25	0.20	6883.50	0.0	Discretionary
19.4.26 Review of developer's engagement strategy(ies) at pre-application stage.			0.20		Fee is 50% of relevant concept fee.	0.20	Fee is 50% of relevant concept fee.	100.0	Discretionary
19.4.27 Strategic major development (EIA Development) - Meeting four onwards	Per hour	2194.50	0.20	2633.40	2194.50	0.20	2633.40	0.0	Discretionary

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

19.4.28 Environmental Health specialist resource		115.50	0.20	138.60	127.05	0.20	152.46	10.0	Discretionary
<b>Planning</b>	UNIT	<b>Basic (£)</b>	<b>VAT</b>	<b>Total 23/24 (£)</b>	<b>Basic (£)</b>	<b>VAT</b>	<b>Total 24/25 (£)</b>	<b>% change</b>	<b>Basis for charging</b>
19.4.29 Highways specialist resource		115.50	0.20	138.60	127.05	0.20	152.46	10.0	Discretionary
<b>20. Planning Performance Agreements (PPA)</b>	Based on required staff time / expertise								
20.1 Arrangement Fee	per hour	2187.50	0.20	2625.00	2187.50	0.20	2625.00	0.0	Discretionary
20.2 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 negotiation	0.20	Subject to agreement during PPA negotiation	Subject to agreement during PPA negotiation	0.20	Subject to agreement during PPA negotiation		Discretionary
20.3 Environmental Health specialist resource	per hour	115.50	0.20	138.60	127.05	0.20	152.46	10.0	Discretionary
20.4 Highways specialist resource	per hour	115.50	0.20	138.60	127.05	0.20	152.46	10.0	Discretionary
20.5 Drafting of S.106 - recovery of officer time	per hour				Charge will be based on officer charge out rates	0.20	Charge will be based on officer charge out rates	100.0	Discretionary
20.6 Variation of Legal Agreements; including those related to S.73 planning applications	per request				1041.67	0.20	1250.00	100.0	Discretionary
<b>21. Planning Officer Charge Out Rates</b>									
Director of Planning	per hour	192.50	0.20	231.00	211.75	0.20	254.10	10.0	Discretionary
Head of DM/ Strategic Planning Manager	per hour	165.00	0.20	198.00	181.50	0.20	217.80	10.0	Discretionary
DM/Major and Strategic Projects Manager/ BLE Manager	per hour	132.00	0.20	158.40	145.20	0.20	174.24	10.0	Discretionary
DM Principal Planner	per hour	110.00	0.20	132.00	121.00	0.20	145.20	10.0	Discretionary

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DM Planner Senior	per hour	93.50	0.20	112.20	102.85	0.20	123.42	10.0	Discretionary
DM Planner	per hour	82.50	0.20	99.00	90.75	0.20	108.90	10.0	Discretionary
<b>Planning</b>	<b>UNIT</b>	<b>Basic (£)</b>	<b>VAT</b>	<b>Total 23/24 (£)</b>	<b>Basic (£)</b>	<b>VAT</b>	<b>Total 24/25 (£)</b>	<b>% change</b>	<b>Basis for charging</b>
Enforcement Manager	per hour	110.00	0.20	132.00	121.00	0.20	145.20	10.0	Discretionary
Enforcement Officer	per hour	82.50	0.20	99.00	90.75	0.20	108.90	10.0	Discretionary
Principal Policy Officer	per hour	110.00	0.20	132.00	121.00	0.20	145.20	10.0	Discretionary
Planning Policy Officer	per hour	93.50	0.20	112.20	102.85	0.20	123.42	10.0	Discretionary
Principal CIL and S106 Officer	per hour	132.00	0.20	158.40	145.20	0.20	174.24	10.0	Discretionary
S106 Officer	per hour	93.50	0.20	112.20	102.85	0.20	123.42	10.0	Discretionary
CIL Officer	per hour	93.50	0.20	112.20	102.85	0.20	123.42	10.0	Discretionary
Monitoring Officer	per hour	77.00	0.20	92.40	84.70	0.20	101.64	10.0	Discretionary
Principal Urban Design Officer	per hour	110.00	0.20	132.00	121.00	0.20	145.20	10.0	Discretionary
Senior Urban Design Officer	per hour	93.50	0.20	112.20	102.85	0.20	123.42	10.0	Discretionary
Urban Design Officer	per hour	82.50	0.20	99.00	90.75	0.20	108.90	10.0	Discretionary
Senior Conservation Officer	per hour	93.50	0.20	112.20	102.85	0.20	123.42	10.0	Discretionary
Conservation Officer	per hour	82.50	0.20	99.00	90.75	0.20	108.90	10.0	Discretionary
Tree Officer	per hour	82.50	0.20	99.00	90.75	0.20	108.90	10.0	Discretionary
Environmental Health Officer	per hour	115.00	0.20	138.60	126.50	0.20	151.80	10.0	Discretionary

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Highways Officer	per hour	115.00	0.20	138.60	126.50	0.20	151.80	10.0	Discretionary
Strategic Housing Officer	per hour	115.00	0.20	138.60	126.50	0.20	151.80	10.0	Discretionary
Ecologist	per hour	115.00	0.20	138.60	126.50	0.20	151.80	10.0	Discretionary
<b>Planning</b>	<b>UNIT</b>	<b>Basic (£)</b>	<b>VAT</b>	<b>Total 23/24 (£)</b>	<b>Basic (£)</b>	<b>VAT</b>	<b>Total 24/25 (£)</b>	<b>% change</b>	<b>Basis for charging</b>
Planning Technician	per hour	66.00	0.20	79.20	72.6	0.20	87.12	10.0	Discretionary
<b>22. Local Land Charges Service</b>									
22.1 Local Land Charges Register only for residential property		44.00	0.00	44.00	44.00	0.00	44.00	0.0	Discretionary
22.2 Local Land Charges Register only for Commercial Property		88.00	0.00	88.00	88.00	0.00	88.00	0.0	Discretionary
22.3 Optional Con29 Questions Only	Per question	12.50	0.20	15.00	12.50	0.20	15.00	0.0	Discretionary
22.4 CON 29 for Residential Property		150.00	0.20	180.00	150.00	0.20	180.00	0.0	Discretionary
22.5 CON 29 for Commercial Property		188.00	0.20	225.60	188.00	0.20	225.60	0.0	Discretionary
22.6 Own Additional Questions on Con29	In addition to normal full search fee.	26.00	0.00	26.00	26.00	0.00	26.00	0.0	Discretionary
22.7 Additional parcels (Residential)	In addition to normal full search fee.	26.00	0.00	26.00	26.00	0.00	26.00	0.0	Discretionary
22.8 Additional parcels (Commercial)	In addition to normal full search fee.	26.00	0.00	26.00	50.00	0.00	50.00	92.0	Discretionary
22.9 Residential Full Local Authority Expedited Search fee (next working day)	In addition to normal full search fee.	41.67	0.20	50.00	41.67	0.20	50.00	0.0	Discretionary
22.10 Commercial Full Local Authority Expedited Search fee (next working day)	In addition to normal full search fee.	41.67	0.20	50.00	66.67	0.20	80.00	60.0	Discretionary

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22.11 Residential Register Search (LLC1) expedited search fee (next working day)	In addition to normal full search fee.	12.50	0.20	15.00	12.50	0.20	15.00	0.0	Discretionary
22.12 Commercial Register Search (LLC1) expedited search fee (next working day)	In addition to normal full search fee.	12.50	0.20	15.00	25.00	0.20	30.00	100.0	Discretionary
<b>Planning</b>	UNIT	<b>Basic (£)</b>	<b>VAT</b>	<b>Total 23/24 (£)</b>	<b>Basic (£)</b>	<b>VAT</b>	<b>Total 24/25 (£)</b>	<b>% change</b>	<b>Basis for charging</b>
22.13 Enhanced Register search fee service that includes copies of documents on register.	In addition to normal full search fee.	64.17	0.20	77.00	64.17	0.20	77.00	0.0	Discretionary
22.14 Search cancellation fee within 24 hours of search being prepared.		Full search fee is payable		Full search fee is payable	Full search fee is payable		Full search fee is payable	0.0	Discretionary
22.15 Copy of Amended Register Search Result Only		5.00	0.00	5.00	5.00	0.00	5.00	0.0	Discretionary
22.16 Copy of Amended CON29 Search Result Only		5.00	0.00	5.00	5.00	0.00	5.00	0.0	Discretionary
22.17 Registration of Light Obstruction Notice	Per notice	60.00	0.00	60.00	60.00	0.00	60.00	0.0	Discretionary
<b>23. Self and Custom Build Housing Register</b>									
Initial registration administration fee (From 1/10/2024)	per site				125.00	0.20	150.00	100.0	Legislation provides for discretionary charging
Annual registration retention administration fee (From 1/1/2024)	per site				83.33	0.20	100.00	100.0	Legislation provides for discretionary charging

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

### SERVICE: HIGHWAYS

Highways	UNIT	Charges 23/24			Proposed charges 24/25			% change	Basis for charging
		Basic (£)	VAT	Total 23/24 (£)	Basic (£)	VAT	Total 24/25 (£)		
Domestic Crossover Application	Each	127.00	0.00	127.00	136.78	0.00	137.00	7.9	Discretionary
Domestic Crossover Installation	Each	0.00	0.00	330.00	355.41	0.00	355.00	7.6	Discretionary
Domestic Crossover Extension	Each	0.00	0.00	330.00	355.41	0.00	355.00	7.6	Discretionary
CPZ T.O. amendments due to crossovers	Each	291.24	0.00	291.00	313.41	0.00	313.00	7.6	Discretionary
Access Bars (road markings)	Each	116.49	0.00	118.00	127.09	0.00	127.00	7.6	Discretionary
Inspection of rechargeable works and other fees	Hr	87.92	0.00	88.00	94.78	0.00	95.00	8.0	Discretionary
Skip Licence	Per Month	75.83	0.00	76.00	81.85	0.00	82.00	7.9	Discretionary
Container Licence	Per Month	127.48	0.00	127.00	136.78	0.00	137.00	7.9	Discretionary
Scaffold Licence	3 months	329.70	0.00	330.00	355.41	0.00	355.00	7.6	Discretionary
Scaffold Licence renewal	3 months	69.24	0.00	69.00	74.31	0.00	75.00	8.7	Discretionary
Hoarding Licence	3 months	228.59	0.00	229.00	246.63	0.00	355.00	55.0	Discretionary
Hoarding Licence renewal	3 months	70.34	0.00	70.00	75.39	0.00	75.00	7.1	Discretionary
Materials licence	1 month	75.83	0.00	76.00	81.85	0.00	82.00	7.9	Discretionary

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

Emergency Temporary Traffic Order	Each	467.08	0.00	467.00	502.96	0.00	503.00	7.7	Discretionary
		<b>Charges 23/24</b>			<b>Proposed charges 24/25</b>				
<b>Highways</b>	UNIT	<b>Basic (£)</b>	<b>VAT</b>	<b>Total 23/24 (£)</b>	<b>Basic (£)</b>	<b>VAT</b>	<b>Total 24/25 (£)</b>	<b>% change</b>	<b>Basis for charging</b>
Temporary Traffic Order	Each	2329.88	0.00	2330.00	2509.41	0.00	2510.00	7.7	Discretionary
Highway Searches	Each	87.92	0.00	88.00	94.78	0.00	95.00	8.0	Discretionary
Crane Licence and oversail	1 month	472.57	0.00	473.00	509.42	0.00	509.00	7.6	Discretionary
Crane Licence and oversail extension	1 month	128.58	0.00	129.00	138.93	0.00	139.00	7.8	Discretionary
Section 50 Licence new apparatus	Each	516.53	0.00	517.00	556.81	0.00	557.00	7.7	Discretionary
Section 50 Licence existing apparatus	Each	313.22	0.00	313.00	337.10	0.00	337.00	7.7	Discretionary
Traffic order for permanent restrictions or changes	Each	5824.70	0.00	5825.00	6273.53	0.00	6273.00	7.7	Discretionary
Car club bay individual order	Each	4159.72	0.00	4160.00	4480.32	0.00	4480.00	7.7	Discretionary
Notices for road humps and controlled crossings	Each	4077.29	0.00	4077.00	4390.93	0.00	4391.00	7.7	Discretionary
Stopping up and diversion orders of the highway (T&C Planning Act section 247 & 253)	Each	5714.80	0.00	5715.00	6155.06	0.00	6155.00	7.7	Discretionary
Section 38 Road Adoption Agreement	% of estimated construction costs			0.08	0.08	0.00	0.08	0	Discretionary
Section 278 Works on highway by outside body	% of estimated construction costs			0.08	0.08	0.00	0.08	0	Discretionary
Application fee for S38/S278 Agreements where over £100k of works	Each	5829.10	0.00	5829.00	6277.83	0.00	6278.00	7.7	Discretionary
Application fee for highway agreements including S8s	Each	1714.44	0.00	1714.00	1845.98	0.00	1846.00	7.7	Discretionary

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

### SERVICE: STREET NAME AND NUMBERING

Street Naming and Numbering	UNIT	Charges 23/24			Proposed charges 24/25			% change	Basis for charging
		Basic (£)	VAT 0.20	Total 23/24 (£)	Basic (£)	VAT 0.2	Total 24/25 (£)		
Written confirmation of address		40.00	0.00	40.00	43.00	0.00	43.00	7.50	Discretionary
New Street name		462.00	0.00	462.00	497.50	0.00	497.50	7.68	Discretionary
New multiple property numbering (block of flats etc)		63.00	0.00	63.00	67.50	0.00	67.50	7.14	Discretionary
New individual property number		63.00	0.00	63.00	67.50	0.00	67.50	7.14	Discretionary
New building name		462.00	0.00	462.00	497.50	0.00	497.50	7.68	Discretionary
Change of name and number for a single property		63.00	0.00	63.00	67.50	0.00	67.50	7.14	Discretionary
Change of name and number for multiple properties		14.00	0.00	14.00	15.00	0.00	15.00	7.14	Discretionary
Add a name to a numbered property (e.g block of flats)		63.00	0.00	63.00	67.00	0.00	67.00	6.35	Discretionary

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

### SERVICE: MARKET TRADERS

Market Traders	UNIT	Charges 23/24			Proposed charges 24/25			% change	Basis for charging
		Basic (£)	VAT	Total 23/24 (£)	Basic (£)	VAT	Total 24/25 (£)		
<b>Market Trading Licence</b>									
<b>Lewisham High Street</b>									
Lewisham High Street Market - Mon to Sat	Per Day	22.51	0.00	22.51	22.51	0.00	22.51	0%	Discretionary
Lewisham High Street Market - Mon to Sat	Per Week	133.91	0.00	133.91	133.91	0.00	133.91	0%	Discretionary
Lewisham High Street Market - Mon to Sat	Per Month	580.29	0.00	580.29	580.29	0.00	580.29	0%	Discretionary
Lewisham High Street Market - Mon to Sat	Per Annum	6963.53	0.00	6963.53	6963.53	0.00	6963.53	0%	Discretionary
Lewisham High Street Market - Sunday	Per Day	27.49	0.00	27.49	27.49	0.00	27.49	0%	Discretionary
Lewisham High Street Market - Sunday	Per Month	119.16	0.00	119.16	119.16	0.00	119.16	0%	Discretionary
Lewisham High Street Market - Sunday	Per Annum	1429.96	0.00	1429.96	1429.96	0.00	1429.96	0%	Discretionary
Burtons Yard - Daily Parking	Per Day	21.75	0.00	21.75	21.75	0.00	21.75	0%	Discretionary
Burtons Yard - Overnight Storage	Per Day	4.16	0.00	4.16	4.16	0.00	4.16	0%	Discretionary
Clarendon rise - Daily Parking	Per Day	19.89	0.00	19.89	19.89	0.00	19.89	0%	Discretionary
<b>Lewisham ODDS</b>									
Lewisham Sunday Only (Odds)	Per Day	17.60	0.00	17.60	17.60	0.00	17.60	0%	Discretionary
Lewisham Sunday Only (Odds)	Per Month	76.26	0.00	76.26	76.26	0.00	76.26	0%	Discretionary
Lewisham Sunday Only (Odds)	Per Annum	915.20	0.00	915.20	915.20	0.00	915.20	0%	Discretionary
Seven Day Traders - Odd Sites	Per Week	96.80	0.00	96.80	96.80	0.00	96.80	0%	Discretionary
Seven Day Traders - Odd Sites	Per Month	419.46	0.00	419.46	419.46	0.00	419.46	0%	Discretionary
Seven Day Traders - Odd Sites	Per Annum	5033.60	0.00	5033.60	5033.60	0.00	5033.60	0%	Discretionary
Lewisham Sunday Market	Per Day	27.49	0.00	27.49	27.49	0.00	27.49	0%	Discretionary
Lewisham Sunday Market	Per Month	119.16	0.00	119.16	119.16	0.00	119.16	0%	Discretionary
Lewisham Sunday Market	Per Annum	1429.96	0.00	1429.96	1429.96	0.00	1429.96	0%	Discretionary
<b>Catford Broadway Market</b>									
Catford - Mon, Tues, Wed, Sun	Per Day	16.89	0.00	16.89	16.89	0.00	16.89	0%	Discretionary

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Catford - Mon, Tues, Wed, Sun	Per Month	73.17	0.00	73.17	73.17	0.00	73.17	0%	Discretionary
		<b>Charges 23/24</b>			<b>Proposed charges 24/25</b>				
<b>Market Traders</b>	UNIT	<b>Basic (£)</b>	<b>VAT</b>	<b>Total 23/24 (£)</b>	<b>Basic (£)</b>	<b>VAT</b>	<b>Total 24/25 (£)</b>	<b>% change</b>	<b>Basis for charging</b>
Catford - Mon, Tues, Wed, Sun	Per Annum	878.02	0.00	878.02	878.02	0.00	878.02	0%	Discretionary
Catford - Thurs and Fri	Per Day	18.57	0.00	18.57	18.57	0.00	18.57	0%	Discretionary
Catford - Thurs and Fri	Per Month	80.47	0.00	80.47	80.47	0.00	80.47	0%	Discretionary
Catford - Thurs and Fri	Per Annum	965.54	0.00	965.54	965.54	0.00	965.54	0%	Discretionary
Catford - Sat	Per Day	16.31	0.00	16.31	16.31	0.00	16.31	0%	Discretionary
Catford - Sat	Per Month	70.69	0.00	70.69	70.69	0.00	70.69	0%	Discretionary
Catford - Sat	Per Annum	848.28	0.00	848.28	848.28	0.00	848.28	0%	Discretionary
<b>Deptford High St and Giffin Square</b>									
DHS and GS - Wed	Per Day	25.88	0.00	25.88	25.88	0.00	25.88	0%	Discretionary
DHS and GS - Wed	Per Month	112.16	0.00	112.16	112.16	0.00	112.16	0%	Discretionary
DHS and GS - Wed	Per Annum	1345.92	0.00	1345.92	1345.92	0.00	1345.92	0%	Discretionary
DHS and GS - Fri	Per Day	16.31	0.00	16.31	16.31	0.00	16.31	0%	Discretionary
DHS and GS - Fri	Per Month	70.69	0.00	70.69	70.69	0.00	70.69	0%	Discretionary
DHS and GS - Fri	Per Annum	848.28	0.00	848.28	848.28	0.00	848.28	0%	Discretionary
DHS and GS - Sat	Per Day	28.14	0.00	28.14	28.14	0.00	28.14	0%	Discretionary
DHS and GS - Sat	Per Month	121.94	0.00	121.94	121.94	0.00	121.94	0%	Discretionary
DHS and GS - Sat	Per Annum	1463.18	0.00	1463.18	1463.18	0.00	1463.18	0%	Discretionary
DHS and GS - Weekly	Per Week	62.46	0.00	62.46	62.46	0.00	62.46	0%	Discretionary
DHS and GS - Weekly	Per Month	270.66	0.00	270.66	270.66	0.00	270.66	0%	Discretionary
DHS and GS - Weekly	Per Annum	3247.82	0.00	3247.82	3247.82	0.00	3247.82	0%	Discretionary
DHS and GS - Stall Storage		49.98	0.00	49.98	49.98	0.00	49.98	0%	Discretionary
<b>Douglas Way</b>									
Douglas Way - Mon to Wed	Per Annum	1199.48	0.00	1199.48	1199.48	0.00	1199.48	0%	Discretionary
Douglas Way - Mon to Wed	Per Month	99.96	0.00	99.96	99.96	0.00	99.96	0%	Discretionary
Douglas Way - Mon to Wed	Per Week	23.07	0.00	23.07	23.07	0.00	23.07	0%	Discretionary
Douglas Way - Thurs and Fri	Per Annum	848.28	0.00	848.28	848.28	0.00	848.28	0%	Discretionary
Douglas Way - Thurs and Fri	Per Month	70.69	0.00	70.69	70.69	0.00	70.69	0%	Discretionary

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Douglas Way - Thurs and Fri	Per Week	16.31	0.00	16.31	16.31	0.00	16.31	0%	Discretionary
		<b>Charges 23/24</b>			<b>Proposed charges 24/25</b>				
<b>Market Traders</b>	<b>UNIT</b>	<b>Basic (£)</b>	<b>VAT</b>	<b>Total 23/24 (£)</b>	<b>Basic (£)</b>	<b>VAT</b>	<b>Total 24/25 (£)</b>	<b>% change</b>	<b>Basis for charging</b>
Douglas Way - Sat	Per Annum	1463.18	0.00	1463.18	1463.18	0.00	1463.18	0%	Discretionary
Douglas Way - Sat	Per Month	121.94	0.00	121.94	121.94	0.00	121.94	0%	Discretionary
Douglas Way - Sat	Per Week	28.14	0.00	28.14	28.14	0.00	28.14	0%	Discretionary
Douglas Way - Weekly	Per Annum	3130.56	0.00	3130.56	3130.56	0.00	3130.56	0%	Discretionary
Douglas Way - Weekly	Per Month	260.88	0.00	260.88	260.88	0.00	260.88	0%	Discretionary
Douglas Way - Weekly	Per Week	60.20	0.00	60.20	60.20	0.00	60.20	0%	Discretionary
Douglas Way - Stall Storage		49.98	0.00	49.98	49.98	0.00	49.98	0%	Discretionary
<b>Casual Trader Fees</b>									
Catford Broadway Mon, Tues, Wed		22.55	0.00	22.55	22.55	0.00	22.55	0%	Discretionary
Catford Broadway Thurs, Fri		23.10	0.00	23.10	23.10	0.00	23.10	0%	Discretionary
Catford Broadway Saturday		22.55	0.00	22.55	22.55	0.00	22.55	0%	Discretionary
Catford Broadway Sunday		25.30	0.00	25.30	25.30	0.00	25.30	0%	Discretionary
DHS and GS Wednesday		30.25	0.00	30.25	30.25	0.00	30.25	0%	Discretionary
DHS and GS Mon, Tues, Thurs, Fri		22.00	0.00	22.00	22.00	0.00	22.00	0%	Discretionary
DHS and GS Saturday		34.10	0.00	34.10	34.10	0.00	34.10	0%	Discretionary
DHS and GS Sunday		35.20	0.00	35.20	35.20	0.00	35.20	0%	Discretionary
Lewisham High St Mon to Sat		29.70	0.00	29.70	29.70	0.00	29.70	0%	Discretionary
Lewisham High St Weekly Mon to Sat		159.50	0.00	159.50	159.50	0.00	159.50	0%	Discretionary
Lewisham Sunday Only		34.10	0.00	34.10	34.10	0.00	34.10	0%	Discretionary
Lewisham Odds Weekly		106.70	0.00	106.70	106.70	0.00	106.70	0%	Discretionary
Lewisham Table and Chairs (1 & 4 any site) per date		7.32	0.00	7.32	7.32	0.00	7.32	0%	Discretionary
Lewisham Focal Area - Demos / FFT per day		88.00	0.00	88.00	88.00	0.00	88.00	0%	Discretionary
Lewisham Focal Area - Event Areas per day		159.50	0.00	159.50	159.50	0.00	159.50	0%	Discretionary
6 days - 1 day discount		797.50	0.00	797.50	797.50	0.00	797.50	0%	Discretionary
Sydenham - Monthly Saturday Market (without stall)		25.30	0.00	25.30	25.30	0.00	25.30	0%	Discretionary

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

Sydenham - Monthly Saturday Market (with stall)		41.80	0.00	41.80	41.80	0.00	41.80	0%	Discretionary
		<b>Charges 23/24</b>			<b>Proposed charges 24/25</b>				
<b>Market Traders</b>	UNIT	<b>Basic (£)</b>	<b>VAT</b>	<b>Total 23/24 (£)</b>	<b>Basic (£)</b>	<b>VAT</b>	<b>Total 24/25 (£)</b>	<b>% change</b>	<b>Basis for charging</b>
<b>Miscellaneous Trading Sites - Cemeteries Lewisham Daily Rate</b>									
Christmas - Up to 14 pitches (per pitch)		13.75	0.00	13.75	13.75	0.00	13.75	0%	Discretionary
Christmas - 15 pitches and over (per pitch)		19.80	0.00	19.80	19.80	0.00	19.80	0%	Discretionary
Licence Fee		16.89	0.00	16.89	16.89	0.00	16.89	0%	Discretionary
Casual Trader Registration		13.75	0.00	13.75	13.75	0.00	13.75	0%	Discretionary
Licence Variation		28.14	0.00	28.14	28.14	0.00	28.14	0%	Discretionary
Duplicate Licence		6.19	0.00	6.19	6.19	0.00	6.19	0%	Discretionary
Replacement Stall Card		6.19	0.00	6.19	6.19	0.00	6.19	0%	Discretionary
Administration Charge - Proposal to Revoke		127.16	0.00	127.16	127.16	0.00	127.16	0%	Discretionary

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

### SERVICE: PRIVATE SECTOR HOUSING AGENCY

Private Sector Housing Agency	UNIT	Charges 23/24			Proposed charges 24/25			% change	Basis for charging
		Basic (£)	VAT	Total 23/24 (£)	Basic (£)	VAT	Total 24/25 (£)		
Service first Improvement Notice/Suspended Improvement Notice	per notice	475.00	95.00	570.00	511.58	102.32	613.89	7.7	Discretionary
Service first Prohibition Order/Suspended prohibition Order	per notice	475.00	95.00	570.00	511.58	102.32	613.89	7.7	Discretionary
Service First Hazard Awareness Notice	per notice	475.00	95.00	570.00	511.58	102.32	613.89	7.7	Discretionary
First Emergency Remedial Action	per notice	475.00	95.00	570.00	511.58	102.32	613.89	7.7	Discretionary
Service Emergency Prohibition Order	per notice	475.00	95.00	570.00	511.58	102.32	613.89	7.7	Discretionary
Service second and subsequent Improvement/Suspended Improvement Notice	per notice	100.00	20.00	120.00	107.70	21.54	129.24	7.7	Discretionary
Service second and subsequent Prohibition Order/Suspended Prohibition Order	per notice	100.00	20.00	120.00	107.70	21.54	129.24	7.7	Discretionary
Service second or subsequent Hazard Awareness Notice	per notice	100.00	20.00	120.00	107.70	21.54	129.24	7.7	Discretionary
Second or subsequent Emergency Remedial Action	per notice	100.00	20.00	120.00	107.70	21.54	129.24	7.7	Discretionary
Service second or subsequent Overcrowding Notice	per notice	100.00	20.00	120.00	107.70	21.54	129.24	7.7	Discretionary
Service second or subsequent Emergency Prohibition Order	per notice	100.00	20.00	120.00	107.70	21.54	129.24	7.7	Discretionary
Adequate Accommodation Assessment (Immigration Rules 2016)	per inspection	225.00	45.00	270.00	242.33	48.47	290.79	7.7	Discretionary
Assistance in completing HMO application form	per application	175.00	35.00	210.00	188.48	37.70	226.17	7.7	Discretionary
Completion of floor plans for HMO licence application	per application	175.00	35.00	210.00	188.48	37.70	226.17	7.7	Discretionary
Civil Penalty Notice First Breach (payment received in 14 days)	per notice	1250.00	250.00	1500.00	1250.00	250.00	1500.00	0.0	Statutory

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

Private Sector Housing Agency	UNIT	Charges 23/24			Proposed charges 24/25				Basis for charging
		Basic (£)	VAT	Total 23/24 (£)	Basic (£)	VAT	Total 24/25 (£)	% change	
Civil Penalty Notice first breach (payment received after 14 days)	per notice	2500.00	500.00	3000.00	2500.00	500.00	3000.00	0.0	Statutory
Civil Penalty Notice second breach (payment received in 14 days)	per notice	2500.00	500.00	3000.00	2500.00	500.00	3000.00	0.0	Statutory
Civil Penalty Notice second breach (payment received after 14 days)	per notice	5000.00	1000.00	6000.00	5000.00	1000.00	6000.00	0.0	Statutory
Civil Penalty Notice third and any subsequent breach	per notice	5000.00	1000.00	6000.00	5000.00	1000.00	6000.00	0.0	Statutory
Additional HMO license fee	per lettable unit	500.00	0.00	500.00	500.00	0.00	500.00	0.0	Discretionary
Mandatory HMO license fee	per lettable unit	500.00	0.00	500.00	500.00	0.00	500.00	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 work on property	15% approved cost of works			15% approved cost of works				Discretionary
Empty Homes VAT exemption certificate.	Per certificate	170.00	34.00	204.00	183.09	36.62	219.71	7.7	Discretionary

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

### SERVICE: LICENSING

Licensing Fees and Trading Standards	UNIT	Charges 23/24			Proposed charges 24/25				Basis for charging
		Basic (£)	VAT	Total 23/24 (£)	Basic (£)	VAT	Total 24/25 (£)	% change	
<b>1. Licensing Act 2003</b>									
1.1. Temporary Event Notice		21.00	0.00	21.00	21.00	0.00	21.00	0.00	Legislation provides for statutory charging
1.2 New Premises Licence Application		Variable	0.00		Variable	0.00	Variable	0.00	Legislation provides for statutory charging
1.3 Premises Licence - Transfer		23.00	0.00	23.00	23.00	0.00	23.00	0.00	Legislation provides for statutory charging
1.4 Premises Licence - Vary DPS		23.00	0.00	23.00	23.00	0.00	23.00	0.00	Legislation provides for statutory charging
1.5 Change name/address/copy licence		10.50	0.00	10.50	10.50	0.00	10.50	0.00	Legislation provides for statutory charging
1.6 Minor Variation		89.00	0.00	89.00	89.00	0.00	89.00	0.00	Legislation provides for statutory charging
1.7 Full Variation		Variable	0.00		Variable	0.00	Variable	0.00	Legislation provides for statutory charging
1.8 New Club Premises Certificate		Variable	0.00		Variable	0.00	Variable	0.00	Legislation provides for statutory charging
1.9 Interim Authority Notice		23.00	0.00	23.00	23.00	0.00	23.00	0.00	Legislation provides for statutory charging
1.10 Provisional Statement		315.00	0.00	315.00	315.00	0.00	315.00	0.00	Legislation provides for statutory charging
1.17 New Personal Licence		37.00	0.00	37.00	37.00	0.00	37.00	0.00	Legislation provides for statutory charging
1.19 Annual Fees		Variable	0.00		Variable	0.00	Variable	0.00	Legislation provides for statutory charging
<b>2. Gambling Act 2005</b>									
2.1 New Small Society Lottery		40.00	0.00	40.00	40.00	0.00	40.00	0.00	Legislation provides for statutory charging
2.2 Small Society Lottery Renewal		20.00	0.00	20.00	20.00	0.00	20.00	0.00	Legislation provides for statutory charging
2.3 Premises Licence Annual Fees		Variable	0.00		Variable	0.00	Variable	0.00	Legislation provides for statutory charging

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

<b>Licensed Premises Gaming Machine Permits</b>									
<b>Licensing Fees and Trading Standards</b>									
		<b>Charges 23/24</b>			<b>Proposed charges 24/25</b>				
	<b>UNIT</b>	<b>Basic (£)</b>	<b>VAT</b>	<b>Total 23/24 (£)</b>	<b>Basic (£)</b>	<b>VAT</b>	<b>Total 24/25 (£)</b>	<b>% change</b>	<b>Basis for charging</b>
2.4	Notification of Gaming Machine Permit	50.00	0.00	50.00	50.00	0.00	50.00	0.00	Legislation provides for statutory charging
2.5	New GMP Application	Variable	0.00		Variable	0.00	Variable	0.00	Legislation provides for statutory charging
2.6	Variation of Permit	100.00	0.00	100.00	100.00	0.00	100.00	0.00	Legislation provides for statutory charging
2.7	Transfer of Permit	25.00	0.00	25.00	25.00	0.00	25.00	0.00	Legislation provides for statutory charging
2.8	Copy of Permit	15.00	0.00	15.00	15.00	0.00	15.00	0.00	Legislation provides for statutory charging
2.9	Annual Fee	50.00	0.00	50.00	50.00	0.00	50.00	0.00	Legislation provides for statutory charging
<b>Club gaming machines &amp; Club Gaming Permits</b>									
2.10	Grant New Operator	200.00	0.00	200.00	200.00	0.00	200.00	0.00	Legislation provides for statutory charging
2.11	Variation of Permit	100.00	0.00	100.00	100.00	0.00	100.00	0.00	Legislation provides for statutory charging
2.12	Annual Fee	50.00	0.00	50.00	50.00	0.00	50.00	0.00	Legislation provides for statutory charging
2.13	Copy of Permit	15.00	0.00	15.00	15.00	0.00	15.00	0.00	Legislation provides for statutory charging
2.14	Transfer of Permit	50.00	0.00	50.00	50.00	0.00	50.00	0.00	Legislation provides for statutory charging
<b>Prize Gaming Permit &amp; Family Entertainment Centres</b>									
2.15	Grant	300.00	0.00	300.00	300.00	0.00	300.00	0.00	Legislation provides for statutory charging
2.16	Renewal	300.00	0.00	300.00	300.00	0.00	300.00	0.00	Legislation provides for statutory charging

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**APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)**

2.17 Transfer		25.00	0.00	25.00	25.00	0.00	25.00	0.00	Legislation provides for statutory charging
2.18 Copy of Permit		15.00	0.00	15.00	15.00	0.00	15.00	0.00	Legislation provides for statutory charging
<b>Licensing Fees and Trading Standards</b>		<b>Charges 23/24</b>			<b>Proposed charges 24/25</b>				
	<b>UNIT</b>	<b>Basic (£)</b>	<b>VAT</b>	<b>Total 23/24 (£)</b>	<b>Basic (£)</b>	<b>VAT</b>	<b>Total 24/25 (£)</b>	<b>% change</b>	<b>Basis for charging</b>
<b>Gambling Premises Licences</b>									
<b>Adult Gaming Centre</b>									
2.19 Provisional Statement		2000.00	0.00	2000.00	2000.00	0.00	2000.00	0.00	Legislation provides for statutory charging
2.20 New Application		2000.00	0.00	2000.00	2000.00	0.00	2000.00	0.00	Legislation provides for statutory charging
2.21 Annual Fee		1000.00	0.00	1000.00	1000.00	0.00	1000.00	0.00	Legislation provides for statutory charging
2.22 Variation		1000.00	0.00	1000.00	1000.00	0.00	1000.00	0.00	Legislation provides for statutory charging
2.23 Transfer		1200.00	0.00	1200.00	1200.00	0.00	1200.00	0.00	Legislation provides for statutory charging
2.24 Re-instatement of Licence		1200.00	0.00	1200.00	1200.00	0.00	1200.00	0.00	Legislation provides for statutory charging
<b>Betting Premises (Other)</b>									
2.25 Provisional Statement		3000.00	0.00	3000.00	3000.00	0.00	3000.00	0.00	Legislation provides for statutory charging
2.26 New Application		3000.00	0.00	3000.00	3000.00	0.00	3000.00	0.00	Legislation provides for statutory charging
2.27 Annual Fee		600.00	0.00	600.00	600.00	0.00	600.00	0.00	Legislation provides for statutory charging
2.28 Variation		1500.00	0.00	1500.00	1500.00	0.00	1500.00	0.00	Legislation provides for statutory charging
2.29 Transfer		1200.00	0.00	1200.00	1200.00	0.00	1200.00	0.00	Legislation provides for statutory charging
2.30 Re-instatement of Licence		1200.00	0.00	1200.00	1200.00	0.00	1200.00	0.00	Legislation provides for statutory charging
<b>Betting Premises (Track)</b>									
2.31 Provisional Statement		2500.00	0.00	2500.00	2500.00	0.00	2500.00	0.00	Legislation provides for statutory charging

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**APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)**

2.32 New Application		2500.00	0.00	2500.00	2500.00	0.00	2500.00	0.00	Legislation provides for statutory charging
2.33 Annual Fee		1000.00	0.00	1000.00	1000.00	0.00	1000.00	0.00	Legislation provides for statutory charging
<b>Licensing Fees and Trading Standards</b>		<b>Charges 23/24</b>			<b>Proposed charges 24/25</b>				
	<b>UNIT</b>	<b>Basic (£)</b>	<b>VAT</b>	<b>Total 23/24 (£)</b>	<b>Basic (£)</b>	<b>VAT</b>	<b>Total 24/25 (£)</b>	<b>% change</b>	<b>Basis for charging</b>
2.34 Variation		1250.00	0.00	1250.00	1250.00	0.00	1250.00	0.00	Legislation provides for statutory charging
2.35 Transfer		950.00	0.00	950.00	950.00	0.00	950.00	0.00	Legislation provides for statutory charging
2.36 Re-instatement of Licence		950.00	0.00	950.00	950.00	0.00	950.00	0.00	Legislation provides for statutory charging
<b>Family Entertainment Centres</b>									
2.37 Provisional Statement		2000.00	0.00	2000.00	2000.00	0.00	2000.00	0.00	Legislation provides for statutory charging
2.38 New Application		2000.00	0.00	2000.00	2000.00	0.00	2000.00	0.00	Legislation provides for statutory charging
2.39 Annual Fee		750.00	0.00	750.00	750.00	0.00	750.00	0.00	Legislation provides for statutory charging
2.40 Variation		1000.00	0.00	1000.00	1000.00	0.00	1000.00	0.00	Legislation provides for statutory charging
2.41 Transfer		950.00	0.00	950.00	950.00	0.00	950.00	0.00	Legislation provides for statutory charging
2.42 Re-instatement of Licence		950.00	0.00	950.00	950.00	0.00	950.00	0.00	Legislation provides for statutory charging
<b>Bingo</b>									
2.43 Provisional Statement		3500.00	0.00	3500.00	3500.00	0.00	3500.00	0.00	Legislation provides for statutory charging
2.44 New Application		3500.00	0.00	3500.00	3500.00	0.00	3500.00	0.00	Legislation provides for statutory charging
2.45 Annual Fee		1000.00	0.00	1000.00	1000.00	0.00	1000.00	0.00	Legislation provides for statutory charging
2.46 Variation		1750.00	0.00	1750.00	1750.00	0.00	1750.00	0.00	Legislation provides for statutory charging

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**APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)**

2.47 Transfer		1200.00	0.00	1200.00	1200.00	0.00	1200.00	0.00	Legislation provides for statutory charging
2.48 Re-instatement of Licence		1200.00	0.00	1200.00	1200.00	0.00	1200.00	0.00	Legislation provides for statutory charging
<b>Regional Casino</b>									
<b>Licensing Fees and Trading Standards</b>		<b>Charges 23/24</b>			<b>Proposed charges 24/25</b>				
	<b>UNIT</b>	<b>Basic (£)</b>	<b>VAT</b>	<b>Total 23/24 (£)</b>	<b>Basic (£)</b>	<b>VAT</b>	<b>Total 24/25 (£)</b>	<b>% change</b>	<b>Basis for charging</b>
2.49 Provisional Statement		15000.00	0.00	15000.00	15000.00	0.00	15000.00	0.00	Legislation provides for statutory charging
2.50 New Application		15000.00	0.00	15000.00	15000.00	0.00	15000.00	0.00	Legislation provides for statutory charging
2.51 Annual Fee		15000.00	0.00	15000.00	15000.00	0.00	15000.00	0.00	Legislation provides for statutory charging
2.52 Variation		7500.00	0.00	7500.00	7500.00	0.00	7500.00	0.00	Legislation provides for statutory charging
2.53 Transfer		6500.00	0.00	6500.00	6500.00	0.00	6500.00	0.00	Legislation provides for statutory charging
2.54 Re-instatement of Licence		6500.00	0.00	6500.00	6500.00	0.00	6500.00	0.00	Legislation provides for statutory charging
<b>Large Casino</b>									
2.55 Provisional Statement		10000.00	0.00	10000.00	10000.00	0.00	10000.00	0.00	Legislation provides for statutory charging
2.56 New Application		10000.00	0.00	10000.00	10000.00	0.00	10000.00	0.00	Legislation provides for statutory charging
2.57 Annual Fee		10000.00	0.00	10000.00	10000.00	0.00	10000.00	0.00	Legislation provides for statutory charging
2.58 Variation		5000.00	0.00	5000.00	5000.00	0.00	5000.00	0.00	Legislation provides for statutory charging
2.59 Transfer		2150.00	0.00	2150.00	2150.00	0.00	2150.00	0.00	Legislation provides for statutory charging
2.60 Re-instatement of Licence		2150.00	0.00	2150.00	2150.00	0.00	2150.00	0.00	Legislation provides for statutory charging
<b>Small Casino</b>									
2.61 Provisional Statement		8000.00	0.00	8000.00	8000.00	0.00	8000.00	0.00	Legislation provides for statutory charging

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

2.62 New Application		8000.00	0.00	8000.00	8000.00	0.00	8000.00	0.00	Legislation provides for statutory charging
2.63 Annual Fee		5000.00	0.00	5000.00	5000.00	0.00	5000.00	0.00	Legislation provides for statutory charging
2.64 Variation		4000.00	0.00	4000.00	4000.00	0.00	4000.00	0.00	Legislation provides for statutory charging
<b>Licensing Fees and Trading Standards</b>		<b>Charges 23/24</b>			<b>Proposed charges 24/25</b>				
	<b>UNIT</b>	<b>Basic (£)</b>	<b>VAT</b>	<b>Total 23/24 (£)</b>	<b>Basic (£)</b>	<b>VAT</b>	<b>Total 24/25 (£)</b>	<b>% change</b>	<b>Basis for charging</b>
2.65 Transfer		1800.00	0.00	1800.00	1800.00	0.00	1800.00	0.00	Legislation provides for statutory charging
2.66 Re-instatement of Licence		1800.00	0.00	1800.00	1800.00	0.00	1800.00	0.00	Legislation provides for statutory charging
<b>3. Animal Activity Licence *See Appendix</b>									
3.1 Part A = Application Fee		251.90	0.00	251.90	n/a	0.00	n/a	n/a	Legislation provides for discretionary charging
3.2 Part B = Grant Fee ( <b>New and renewal</b> )		480.70	0.00	480.70	420.00	0.00	420.00	-12.63	Legislation provides for discretionary charging
3.3 Part A ( <b>New Application</b> ) - Animal Boarding (combined species cats and dogs)		251.90	0.00	251.90	614.00	0.00	614.00	143.75	Legislation provides for discretionary charging
3.4 Part A ( <b>New Application</b> ) - Animal Boarding (single species cats and dogs)		251.90	0.00	251.90	531.00	0.00	531.00	110.80	Legislation provides for discretionary charging
3.5 Part A ( <b>New Application</b> ) - Providing home boarding for dogs		251.90	0.00	251.90	429.00	0.00	429.00	70.31	Legislation provides for discretionary charging
3.6 Part A ( <b>New Application</b> ) - Providing day care for dogs		251.90	0.00	251.90	511.00	0.00	511.00	102.86	Legislation provides for discretionary charging
3.7 Part A ( <b>New Application</b> ) - Breeding dogs (with kennels)		251.90	0.00	251.90	623.00	0.00	623.00	147.32	Legislation provides for discretionary charging
3.8 Part A ( <b>New Application</b> ) - Breeding dogs (domestic dwelling)		251.90	0.00	251.90	546.00	0.00	546.00	116.75	Legislation provides for discretionary charging
3.9 Part A ( <b>New Application</b> )- Selling animals as pets		251.90	0.00	251.90	614.00	0.00	614.00	143.75	Legislation provides for discretionary charging
3.10 Part A ( <b>New Application</b> ) - Keeping or training animals for exhibition		251.90	0.00	251.90	614.00	0.00	614.00	143.75	Legislation provides for discretionary charging

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

3.11 Part A ( <b>New Application</b> ) -Riding Establishment* (additional fees per horse apply)		251.90	0.00	251.90	627.00	0.00	627.00	148.91	Legislation provides for discretionary charging
3.3 Part A ( <b>Renewal</b> ) - Animal Boarding (combined species cats and dogs)		251.90	0.00	251.90	546.00	0.00	546.00	116.75	Legislation provides for discretionary charging
3.4 Part A ( <b>Renewal</b> ) - Animal Boarding (single species cats and dogs)		251.90	0.00	251.90	462.00	0.00	462.00	83.41	Legislation provides for discretionary charging
3.5 Part A ( <b>Renewal</b> )- Providing home boarding for dogs		251.90	0.00	251.90	396.00	0.00	396.00	57.21	Legislation provides for discretionary charging
<b>Licensing Fees and Trading Standards</b>		<b>Charges 23/24</b>			<b>Proposed charges 24/25</b>				
	<b>UNIT</b>	<b>Basic (£)</b>	<b>VAT</b>	<b>Total 23/24 (£)</b>	<b>Basic (£)</b>	<b>VAT</b>	<b>Total 24/25 (£)</b>	<b>% change</b>	<b>Basis for charging</b>
3.6 Part A ( <b>Renewal</b> )- Providing day care for dogs		251.90	0.00	251.90	462.00	0.00	462.00	83.41	Legislation provides for discretionary charging
3.7 Part A ( <b>Renewal</b> )- Breeding dogs (with kennels)		251.90	0.00	251.90	546.00	0.00	546.00	116.75	Legislation provides for discretionary charging
3.8 Part A ( <b>Renewal</b> )- Breeding dogs (domestic dwelling)		251.90	0.00	251.90	462.00	0.00	462.00	83.41	Legislation provides for discretionary charging
3.9 Part A ( <b>Renewal</b> )- Selling animals as pets		251.90	0.00	251.90	546.00	0.00	546.00	116.75	Legislation provides for discretionary charging
3.10 Part A ( <b>Renewal</b> ) - Keeping or training animals for exhibition		251.90	0.00	251.90	546.00	0.00	546.00	116.75	Legislation provides for discretionary charging
3.11 Part A ( <b>Renewal</b> ) - Riding Establishment* (additional fees per horse apply)		251.90	0.00	251.90	507.00	0.00	507.00	101.27	Legislation provides for discretionary charging
<b>4. Dangerous Wild Animals</b>									
4.1 New Application		300.30	0.00	300.30	323.42	0.00	323.42	7.70	Legislation provides for discretionary charging
4.2 Renewal		300.30	0.00	300.30	323.42	0.00	323.42	7.70	Legislation provides for discretionary charging
4.3 Copy of licence		11.55	0.00	11.55	12.44	0.00	12.44	7.70	Legislation provides for discretionary charging
<b>6. Film Classifications</b>									
6.1 New Film Classification	Per Hour	108.68	0.00	108.68	117.05	0.00	117.05	7.70	Legislation provides for discretionary charging
<b>7. Hypnotism</b>									
7.1 Hypnotism - New		97.24	0.00	97.24	104.73	0.00	104.73	7.70	Legislation provides for discretionary charging

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

<b>8. Scrap Metal Licence - Site</b>									
8.1 New Application		777.92	0.00	777.92	837.82	0.00	837.82	7.70	Legislation provides for discretionary charging
8.2 Renewal		777.92	0.00	777.92	837.82	0.00	837.82	7.70	
8.3 Variation		320.32	0.00	320.32	344.98	0.00	344.98	7.70	Legislation provides for discretionary charging
8.4 Copy of Licence		11.99	0.00	11.99	12.91	0.00	12.91	7.70	Legislation provides for discretionary charging
<b>Licensing Fees and Trading Standards</b>		<b>Charges 23/24</b>			<b>Proposed charges 24/25</b>				
	UNIT	Basic (£)	VAT	Total 23/24 (£)	Basic (£)	VAT	Total 24/25 (£)	% change	Basis for charging
8.5 Transfer		320.32	0.00	320.32	344.98	0.00	344.98	7.70	Legislation provides for discretionary charging
<b>8. Scrap Metal Licence - Collector</b>									
8.6 New Application		388.96	0.00	388.96	418.91	0.00	418.91	7.70	Legislation provides for discretionary charging
8.7 Renewal		388.96	0.00	388.96	418.91	0.00	418.91	7.70	
8.8 Variation		320.32	0.00	320.32	344.98	0.00	344.98	7.70	Legislation provides for discretionary charging
8.9 Copy of Licence		11.99	0.00	11.99	12.91	0.00	12.91	7.70	Legislation provides for discretionary charging
<b>9. Marriages</b>									
9.1 New Marriage Application		331.76	0.00	331.76	357.31	0.00	357.31	7.70	Legislation provides for discretionary charging
9.2 Marriage Renewal		331.76	0.00	331.76	357.31	0.00	357.31	7.70	Legislation provides for discretionary charging
<b>10. Sex Establishments</b>									
10.1 Part A -New Application Fee		2890.90	0.00	2890.90	3113.50	0.00	3113.50	7.70	Legislation provides for discretionary charging
10.2 Part B - New Application Fee		1400.20	0.00	1400.20	1508.02	0.00	1508.02	7.70	Legislation provides for discretionary charging
10.4 Part A Variation		867.15	0.00	867.15	933.92	0.00	933.92	7.70	Legislation provides for discretionary charging
10.5 Part B Variation		139.57	0.00	139.57	150.32	0.00	150.32	7.70	Legislation provides for discretionary charging

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10.6 Transfer		457.60	0.00	457.60	492.84	0.00	492.84	7.70	Legislation provides for discretionary charging
Duplicate Copy		27.50	0.00	27.50	29.62	0.00	29.62	7.70	Legislation provides for discretionary charging
<b>11. Fireworks - Health and Safety (Fees) Regulations 2016</b>									
<b>New</b> Explosives Licence where a minimum separation distance of greater than 0 metres is prescribed									
<b>Licensing Fees and Trading Standards</b>		<b>Charges 23/24</b>			<b>Proposed charges 24/25</b>				
	<b>UNIT</b>	<b>Basic (£)</b>	<b>VAT</b>	<b>Total 23/24 (£)</b>	<b>Basic (£)</b>	<b>VAT</b>	<b>Total 24/25 (£)</b>	<b>% change</b>	<b>Basis for charging</b>
1 Year Licence		211.60	0.00	211.60	227.89	0.00	227.89	7.70	Legislation provides for discretionary charging
2 Year Licence		278.00	0.00	278.00	299.41	0.00	299.41	7.70	Legislation provides for discretionary charging
3 Licence		347.60	0.00	347.60	374.37	0.00	374.37	7.70	Legislation provides for discretionary charging
4 Year Licence		427.90	0.00	427.90	460.85	0.00	460.85	7.70	Legislation provides for discretionary charging
5 Year Licence		483.90	0.00	483.90	521.16	0.00	521.16	7.70	Legislation provides for discretionary charging
<b>New</b> Explosives Licence where no minimum separation distance or a 0 metres minimum separation distance is prescribed									
1 Year Licence		124.70	0.00	124.70	134.30	0.00	134.30	7.70	Legislation provides for discretionary charging
2 Year Licence		161.30	0.00	161.30	173.72	0.00	173.72	7.70	Legislation provides for discretionary charging
3 Licence		197.90	0.00	197.90	213.14	0.00	213.14	7.70	Legislation provides for discretionary charging
4 Year Licence		235.70	0.00	235.70	253.85	0.00	253.85	7.70	Legislation provides for discretionary charging
5 Year Licence		272.30	0.00	272.30	293.27	0.00	293.27	7.70	Legislation provides for discretionary charging

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**APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)**

<b>Renewal</b> Explosives Licence where a minimum separation distance of greater than 0 metres is prescribed									
1 Year Licence		98.40	0.00	98.40	105.98	0.00	105.98	7.70	Legislation provides for discretionary charging
2 Year Licence		168.20	0.00	168.20	181.15	0.00	181.15	7.70	Legislation provides for discretionary charging
3 Licence		232.20	0.00	232.20	250.08	0.00	250.08	7.70	Legislation provides for discretionary charging
4 Year Licence		304.30	0.00	304.30	327.73	0.00	327.73	7.70	Legislation provides for discretionary charging
<b>Licensing Fees and Trading Standards</b>		<b>Charges 23/24</b>			<b>Proposed charges 24/25</b>				
	<b>UNIT</b>	<b>Basic (£)</b>	<b>VAT</b>	<b>Total 23/24 (£)</b>	<b>Basic (£)</b>	<b>VAT</b>	<b>Total 24/25 (£)</b>	<b>% change</b>	<b>Basis for charging</b>
5 Year Licence		372.90	0.00	372.90	401.61	0.00	401.61	7.70	Legislation provides for discretionary charging
<b>Renewal</b> Explosives Licence where no minimum separation distance or a 0 metres minimum separation distance is prescribed									
1 Year Licence		61.80	0.00	61.80	66.56	0.00	66.56	7.70	Legislation provides for discretionary charging
2 Year Licence		98.40	0.00	98.40	105.98	0.00	105.98	7.70	Legislation provides for discretionary charging
3 Licence		137.30	0.00	137.30	147.87	0.00	147.87	7.70	Legislation provides for discretionary charging
4 Year Licence		173.90	0.00	173.90	187.29	0.00	187.29	7.70	Legislation provides for discretionary charging
5 Year Licence		211.60	0.00	211.60	227.89	0.00	227.89	7.70	Legislation provides for discretionary charging
<b>Explosive Licence</b>									
Change of name of licensee or address of site		41.20	0.00	41.20	44.37	0.00	44.37	7.70	Legislation provides for discretionary charging
Transfer		41.10	0.00	41.10	44.26	0.00	44.26	7.70	Legislation provides for discretionary charging

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

Duplicate Copy		41.20	0.00	41.20	44.37	0.00	44.37	7.70	Legislation provides for discretionary charging
<b>Pavement Licence</b>									
New		100.00	0.00	100.00	100.00	0.00	100	0.00	Legislation provides for statutory charging

### SERVICE: TENNIS COURTS

Tennis Courts	UNIT	Charges 23/24			Proposed charges 24/25			% change	Basis for charging
		Basic £	VAT	Total 23/24 (£)	Basic (£)	VAT	Total 24/25 (£)		
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

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

### SERVICE: COMMUNITY CENTRES

Community Centres	UNIT	Proposed charges 23/24			Proposed charges 24/25				Basis for charging
		Basic (£)	VAT	Total 23/24 (£)	Basic (£)	VAT	Total 24/25 (£)	% change	
Evelyn Community Centre (Main Hall) Mon-Fri		26.00	0.00	26.00	28.0	0.0	28.0	7.7	Discretionary
Evelyn Community Centre (Main Hall) Sat / Sun before 6pm		35.00	0.00	35.00	38.0	0.0	38.0	8.6	Discretionary
Evelyn Community Centre (Main Hall) Sat / Sun after 6pm		50.00	0.00	50.00	55.0	0.0	55.0	10.0	Discretionary
Evelyn Community Centre (Hairdressing room)		14.50	0.00	14.50	15.5	0.0	15.5	6.9	Discretionary
Scotney Hall (Main Hall) Mon-Fri		22.00	0.00	22.00	24.0	0.0	24.0	9.1	Discretionary
Scotney Hall (Main Hall) Sat / Sun before 6pm		28.00	0.00	28.00	30.0	0.0	30.0	7.1	Discretionary
Scotney Hall (Main Hall) Sat / Sun after 6pm		40.00	0.00	40.00	44.0	0.0	44.0	10.0	Discretionary
(Concessionary rates – all sites)		16.50	0.00	16.50	18.0	0.0	18.0	9.1	Discretionary
(CIS rates – all sites)		55.00	0.00	55.00		0.0			Discretionary
<b>2. Leemore</b>									Discretionary
Lower Ground Hall VCS weekdays		36.00	0.00	36.00	38.50	0.00	38.50	6.9	Discretionary
Lower Ground Hall VCS evenings & weekends		40.00	0.00	40.00	43.00	0.00	43.00	7.5	Discretionary
Lower Ground Hall Commercial weekdays		40.00	0.00	40.00	43.00	0.00	43.00	7.5	Discretionary
Lower Ground Hall Commercial evenings & weekends		43.00	0.00	43.00	46.50	0.00	46.50	8.1	Discretionary
Hourly rate:		26.00	0.00	26.00	28.00	0.00	28.00	7.7	Discretionary
Sat/Sun before 6pm:		35.00	0.00	35.00	37.50	0.00	37.50	7.1	Discretionary
Sat/Sun after 6pm:		52.00	0.00	52.00	56.00	0.00	56.00	7.7	Discretionary
Sat/Sun before 6pm		25.00	0.00	25.00	27.00	0.00	27.00	8.0	Discretionary
Sat/Sun after 6pm:		29.00	0.00	29.00	31.00	0.00	31.00	6.9	Discretionary
Hourly rate		22.00	0.00	22.00	23.50	0.00	23.50	6.8	Discretionary
Sat & Sun before 6pm per hour		28.00	0.00	28.00	30.00	0.00	30.00	7.1	Discretionary
Sat & Sun after 6pm per hour		40.00	0.00	40.00	43.00	0.00	43.00	7.5	Discretionary
<b>Sydenham Hub</b>									Discretionary
Main Hall		35.00	0.00	35.00	37.50	0.00	37.50	7.1	Discretionary

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

Activity Room 1 (one-off users)		20.00	0.00	20.00	21.50	0.00	21.50	7.5	Discretionary
		<b>Proposed charges 23/24</b>			<b>Proposed charges 24/25</b>				
<b>Community Centres</b>	<b>UNIT</b>	<b>Basic (£)</b>	<b>VAT</b>	<b>Total 23/24 (£)</b>	<b>Basic (£)</b>	<b>VAT</b>	<b>Total 24/25 (£)</b>	<b>% change</b>	<b>Basis for charging</b>
Activity Room 2 (one-off users)		20.00	0.00	20.00	21.50	0.00	21.50	7.5	Discretionary
Activity Room 1 (regular users)		12.00	0.00	12.00	13.00	0.00	13.00	8.3	Discretionary
Activity Room 2 (regular users)		12.00	0.00	12.00	13.00	0.00	13.00	8.3	Discretionary
Activity Rooms (if using Main Hall)		5.00	0.00	5.00	5.40	0.00	5.40	8.0	Discretionary

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**APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)**

**SERVICE: LIBRARY AND INFORMATION SERVICE**

Library and Information service	UNIT	Charges 23/24			Proposed charges 24/25			% change	Basis for charging
		Basic (£)	VAT	Total 23/24 (£)	Basic (£)	VAT	Total 24/25 (£)		
<b>1. Charges for Lost items</b>									
1.1 Lost stock		5.00	0.00	5.00	5.50	0.00	5.50	10%	Discretionary
<b>2 Charges for reserving specific items</b>									
2.3 British Library book reservations	per reservation	15.80	0.00	15.80	16.90	0.00	16.90	7%	Discretionary
	+ additional	5.00	0.00	5.00	5.50	0.00	5.50	10%	Discretionary
2.4 British Library article reservations	per reservation, cost plus 10p per page	15.80	0.00	15.80	16.90	0.00	16.90	7%	Discretionary
	+ additional	5.00	0.00	5.00	5.50	0.00	5.50	10%	Discretionary
<b>3 Other services</b>									
3.1 Colour printing and copying A4	per sheet	0.50	0.00	0.50	0.55	0.00	0.55	10%	Discretionary
3.2 Colour printing and copying A3	per sheet	1.00	0.00	1.00	1.07	0.00	1.07	7%	Discretionary
3.3 Black and white printing and copying A4	per sheet	0.20	0.00	0.20	0.25	0.00	0.25	25%	Discretionary
3.4 Black and white printing and copying A3	per sheet	0.30	0.00	0.30	0.35	0.00	0.35	17%	Discretionary
<b>4 Sales</b>									
4.1 Pen		0.50	0.00	0.50	0.55	0.00	0.55	10%	Discretionary
4.2 Pencil		0.50	0.00	0.50	0.55	0.00	0.55	10%	Discretionary
4.3 A4 plain paper		0.20	0.00	0.20	0.25	0.00	0.25	25%	Discretionary
4.4 A3 plain paper		0.30	0.00	0.30	0.35	0.00	0.35	17%	Discretionary
<b>5. Room hire (commercial)*</b>									
5.1 Deptford Lounge – Rm 1	per hour	20.00	0.00	20.00	21.40	0.00	21.40	7%	Discretionary
5.2 Deptford Lounge – Rm 2	per hour	20.00	0.00	20.00	21.40	0.00	21.40	7%	Discretionary
5.3 Deptford Lounge – Rm 1+2	per hour	40.00	0.00	40.00	42.80	0.00	42.80	7%	Discretionary
5.4 Downham Library	per hour	20.00	0.00	20.00	21.40	0.00	21.40	7%	Discretionary
5.5 Catford Library – Open pod	per hour	15.00	0.00	15.00	16.05	0.00	16.05	7%	Discretionary

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5.6 Catford Library – Closed pod	per hour	20.00	0.00	20.00	21.40	0.00	21.40	7%	Discretionary
		<b>Charges 23/24</b>			<b>Proposed charges 24/25</b>				
<b>Library and Information service</b>	UNIT	<b>Basic (£)</b>	<b>VAT</b>	<b>Total 23/24 (£)</b>	<b>Basic (£)</b>	<b>VAT</b>	<b>Total 24/25 (£)</b>	<b>% change</b>	<b>Basis for charging</b>
5.7 Catford Library – Rm 1	per hour	25.00	0.00	25.00	26.75	0.00	26.75	7%	Discretionary
5.8 Catford Library – Rm 2	per hour	25.00	0.00	25.00	26.75	0.00	26.75	7%	Discretionary
75.9 Catford Library – Rm 1+2	per hour	45.00	0.00	45.00	48.15	0.00	48.15	7%	Discretionary
* Reduced charges apply to 3rd sector organisations, LBL, and multiple bookings (e.g. more than one hour, full day, regular bookings)									Discretionary
<b>6 Local History and Archives Commercial reuse of images licensing</b>									Discretionary
6.1 Commercial publication	Double for worldwide rights	20.00	0.00	20.00	21.40	0.00	21.40	7%	Discretionary
6.2 Scholarly/non-profit publication		10.00	0.00	10.00	10.70	0.00	10.70	7%	Discretionary
6.3 Commercial exhibition	Double for worldwide rights	40.00	0.00	40.00	42.80	0.00	42.80	7%	Discretionary
6.4 Advertising		80.00	0.00	80.00	85.60	0.00	85.60	7%	Discretionary
6.5 Merchandising	Double for worldwide rights	100.00	0.00	100.00	107.00	0.00	107.00	7%	Discretionary
6.6 Commercial interior/exterior decoration	for up to 5 images	150.00	0.00	150.00	160.50	0.00	160.50	7%	Discretionary
6.7 Film and television UK	for 5 years	60.00	0.00	60.00	64.20	0.00	64.20	7%	Discretionary
6.8 Film and television additional years UK		30.00	0.00	30.00	32.10	0.00	32.10	7%	Discretionary
8.9 Film and television worldwide rights		100.00	0.00	100.00	107.00	0.00	107.00	7%	Discretionary
6.10 Film and television additional years worldwide rights		50.00	0.00	50.00	53.50	0.00	53.50	7%	Discretionary
6.11 In perpetuity rights	For ever	0.00	0.00	0.00	150.00	0.00	150.00	100%	Discretionary
<b>7 Local History and Archives other charges</b>						0.00			
7.2 Copying Archive material A4		1.50	0.00	1.50	1.61	0.00	1.61	7%	Discretionary
7.3 Copying Archive material A3		2.00	0.00	2.00	2.14	0.00	2.14	7%	Discretionary
7.4 Scans 300dpi		5.00	0.00	5.00	5.35	0.00	5.35	7%	Discretionary
7.6 Photography permit half day	half day	5.00	0.00	5.00	5.35	0.00	5.35	7%	Discretionary
7.7 Photography permit full day	1 full day	0.00	0.00	0.00	8.00	0.00	8.00	100%	Discretionary

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**APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)**

**SERVICE: REGISTER OFFICE**

		Charges 23/24			Proposed charges 24/25				
Register Office	UNIT	Basic (£)	VAT	Total 23/24 (£)	Basic (£)	VAT	Total 24/25 (£)	% change	Basis for charging
<b>1. Birth, Death, Marriage or Civil Partnership Certificates</b>									
<i>1.1 Standard Service (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	0.00	11.00	11.00	0.00	11.00	0.0	Statutory
1.1.2 Civil Partnership certificates		11.00	0.00	11.00	11.00	0.00	11.00	0.0	Statutory
<i>1.2 Priority Service (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		35.00	0.00	35.00	35.00	0.00	35.00	0.0	Statutory
1.2.2 Civil Partnership certificates		35.00	0.00	35.00	35.00	0.00	35.00	0.0	Statutory
<b>2. Fees for marriage and divorce</b>									
<b>2.1 Marriage by Superintendent Registrar's certificate</b>									
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
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

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

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
		<b>Charges 23/24</b>			<b>Proposed charges 24/25</b>				
<b>Register Office</b>	UNIT	<b>Basic (£)</b>	<b>VAT</b>	<b>Total 23/24 (£)</b>	<b>Basic (£)</b>	<b>VAT</b>	<b>Total 24/25 (£)</b>	<b>% change</b>	<b>Basis for charging</b>
<b>2.2 Attendance at the ceremony</b>									
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		86.00	0.00	86.00	86.00	0.00	86.00	0.0	Statutory
<b>3. Fees for Civil Partnership</b>									
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
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 Attendance at civil partnership registration at the registrar office		46.00	0.00	46.00	46.00	0.00	46.00	0.0	Statutory
<b>4. Fees for the conversion of a civil partnership into marriage</b>									
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
<b>4.2 Two stage procedure on other premises</b>									
4.2.2 Completing the declaration		27.00	0.00	27.00	27.00	0.00	27.00	0.0	Statutory

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

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
		<b>Charges 23/24</b>			<b>Proposed charges 24/25</b>				
<b>Register Office</b>	<b>UNIT</b>	<b>Basic (£)</b>	<b>VAT</b>	<b>Total 23/24 (£)</b>	<b>Basic (£)</b>	<b>VAT</b>	<b>Total 24/25 (£)</b>	<b>% change</b>	<b>Basis for charging</b>
<b>5. Fees for changes to initial registration</b>									
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
<b>6. Fees for searches in indexes</b>									
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
<b>7. Postage</b>									
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
<b>8. Ceremonies</b>									
<b>8.1 The Evelyn Suite, 368 Lewisham High Street. Ceremonies taking place between 0900 and 1700</b>									
8.1.1 Monday to Thursday		261.00	0.00	261.00	281.00	0.00	281.00	7.7	Discretionary (includes £46 statutory fee)
8.1.2 Friday		320.00	0.00	320.00	344.00	0.00	344.00	7.5	Discretionary (includes £46 statutory fee)
8.1.3 Saturday		380.00	0.00	380.00	409.00	0.00	409.00	7.6	Discretionary (includes £46 statutory fee)

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**APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)**

<b>8.2 The Evelyn Suite, 368 Lewisham High Street. Ceremonies taking place between 1700 and 2000</b>									
8.2.1 Monday to Thursday		416.00	0.00	416.00	448.00	0.00	448.00	7.7	Discretionary (includes £46 statutory fee)
8.2.2 Friday		542.00	0.00	542.00	583.00	0.00	583.00	7.6	Discretionary (includes £46 statutory fee)
		<b>Charges 23/24</b>			<b>Proposed charges 24/25</b>				
<b>Register Office</b>	UNIT	<b>Basic (£)</b>	<b>VAT</b>	<b>Total 23/24 (£)</b>	<b>Basic (£)</b>	<b>VAT</b>	<b>Total 24/25 (£)</b>	<b>% change</b>	<b>Basis for charging</b>
8.2.3 Saturday		668.00	0.00	668.00	719.00	0.00	719.00	7.6	Discretionary (includes £46 statutory fee)
<b>8.3 All external venues. Ceremonies taking place between 0900 and 1700.</b>									
8.3.1 Monday to Thursday		560.00	0.00	560.00	603.00	0.00	603.00	7.7	Discretionary (includes £46 statutory fee)
8.3.2 Friday		624.00	0.00	624.00	672.00	0.00	672.00	7.7	Discretionary (includes £46 statutory fee)
8.3.3 Saturday		782.00	0.00	782.00	842.00	0.00	842.00	7.7	Discretionary (includes £46 statutory fee)
8.3.4 Sunday / Bank Holiday		848.00	0.00	848.00	913.00	0.00	913.00	7.7	Discretionary (includes £46 statutory fee)
<b>8.4 All external venues. Ceremonies taking place between 1700 and 2000.</b>									
8.4.1 Monday to Thursday		639.00	0.00	639.00	688.00	0.00	688.00	7.7	Discretionary (includes £46 statutory fee)
8.4.2 Friday		692.00	0.00	692.00	745.00	0.00	745.00	7.7	Discretionary (includes £46 statutory fee)
8.4.3 Saturday		841.00	0.00	841.00	905.00	0.00	905.00	7.6	Discretionary (includes £46 statutory fee)
8.4.4 Sunday / Bank Holiday		1009.00	0.00	1009.00	1086.00	0.00	1086.00	7.6	Discretionary (includes £46 statutory fee)
<b>9. Private Citizenship Ceremony</b>									
9.1 Monday- Friday		110	0	110	118.00	0.00	118.00	7.3	Discretionary

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

### SERVICE: REVENUE SERVICE AND INCOME TEAM

	UNIT	Charges 23/24			Proposed charges 24/25			% change	Basis for charging
		Basic (£)	VAT	Total 23/24 (£)	Basic (£)	VAT	Total 24/25 (£)		
<b>Revenue Service and Income Team</b>									
Summons application and liability order costs	Per summons	172.5	0.00	172.5	172.5	0.00	172.5	0.0	Statutory
Blue Badge		11.00	0.00	11.00	11.00	0.00	11.00	0.0	Discretionary
Freedom Pass		11.00	0.00	11.00	11.00	0.00	11.00	0.0	Discretionary
CTAX Recovery		134.75	0.00	134.75	134.75	0.00	134.75	0.0	Discretionary
NNDR Recovery		192.50	0.00	192.50	192.50	0.00	192.50	0.0	Discretionary
Summon 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 Z6 (2024/25 BUDGET REPORT)**

**SERVICE: PARKING**

	Business Permit Bands Petrol & Diesel (compliant) - Permit Price Single Business Zone			Business Permit Bands Diesel (non-compliant) - Permit Price Single Business Zone		
Emission Band	Charges 23/24	Proposed Charges 24/25	% Increase	Charges 23/24	Proposed Charges 24/25	% Increase
0	50.00	53.85	7.7	-		
1	385.00	414.65	7.7	455.00	489.65	7.7
2	440.00	473.88	7.7	510.00	548.88	7.7
3	495.00	533.12	7.7	565.00	608.12	7.7
4	550.00	592.35	7.7	620.00	667.35	7.7
5	605.00	651.59	7.7	675.00	726.59	7.7
6	660.00	710.82	7.7	730.00	785.82	7.7
7	715.00	770.06	7.7	785.00	845.06	7.7
8	770.00	829.29	7.7	840.00	904.29	7.7
9	825.00	888.53	7.7	895.00	963.53	7.7
10	880.00	947.76	7.7	950.00	1,022.76	7.7
11	935.00	1,007.00	7.7	1,005.00	1,082.00	7.7
12	990.00	1,066.23	7.7	1,060.00	1,141.23	7.7
13	1045.00	1125.47	7.7	1,115.00	1,200.47	7.7

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**APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)**

	Business Charity Permit Bands Petrol & Diesel (compliant) - Permit Price			Business Charity Permit Bands Diesel (non-compliant) - Permit Price		
Duration	Charges 23/24	Proposed Charges 24/25	% Increase	Charges 23/24	Proposed Charges 24/25	% Increase
12 months	120.00	129.24	7.7	190.00	204.24	7.7

	Business All zones Permit Bands Petrol & Diesel (compliant) - Permit Price All Business Zones			Business All Zones Permit Bands Diesel (non-compliant) - Permit Price All Business Zones		
Emission Band	Charges 23/24	Proposed Charges 24/25	% Increase	Charges 23/24	Proposed Charges 24/25	% Increase
0	357.50	385.03	7.7			
1	715.00	770.06	7.7	785.00	845.06	7.7
2	770.00	829.29	7.7	840.00	904.29	7.7
3	825.00	888.53	7.7	895.00	963.53	7.7
4	880.00	947.76	7.7	950.00	1,022.76	7.7
5	935.00	1,007.00	7.7	1,005.00	1,082.00	7.7
6	990.00	1,066.23	7.7	1,060.00	1,141.23	7.7
7	1,045.00	1,125.47	7.7	1,115.00	1,200.47	7.7
8	1,100.00	1,184.70	7.7	1,170.00	1,259.70	7.7
9	1,155.00	1,243.94	7.7	1,225.00	1,318.94	7.7
10	1,210.00	1,303.17	7.7	1,280.00	1,378.17	7.7
11	1,265.00	1,362.41	7.7	1,335.00	1,437.41	7.7
12	1,320.00	1,421.64	7.7	1,390.00	1,496.64	7.7
13	1,375.00	1,480.88	7.7	1,445.00	1,555.88	7.7

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

Business Motorcycles Permit Bands			
Emissions (g/km CO2)	Charges 23/24	Proposed Charges 24/25	% Increase
Electric Motorcycle			
Up to 70	50.00	53.85	7.7
71 - 90	75.00	80.78	7.7
91 - 100	100.00	107.70	7.7
101+	125.00	134.63	7.7

Emission Band	Community Health Permit Bands Petrol & Diesel (compliant) - Permit Price			Community Health Permit Bands Diesel (non-compliant) - Permit Price		
	Charges 23/24	Proposed Charges 24/25	% Increase	Charges 23/24	Proposed Charges 24/25	% Increase
0	270.00	202.50	-25			
1	385.00	288.75	-25	455.00	363.75	-20.1
2	440.00	330.00	-25	510.00	405.00	-20.6
3	495.00	371.25	-25	565.00	446.25	-21.0
4	550.00	412.50	-25	620.00	487.50	-21.4
5	605.00	453.75	-25	675.00	528.75	-21.7
6	660.00	495.00	-25	730.00	570.00	-21.9
7	715.00	536.25	-25	785.00	611.25	-22.1
8	770.00	577.50	-25	840.00	652.50	-22.3

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**APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)**

9	825.00	618.75	-25	895.00	693.75	-22.5
10	880.00	660.00	-25	950.00	735.00	-22.6
<b>Emission Band</b>	<b>Charges 23/24</b>	<b>Proposed Charges 24/25</b>	<b>% Increase</b>	<b>Charges 23/24</b>	<b>Proposed Charges 24/25</b>	<b>% Increase</b>
11	935.00	701.25	-25	1,005.00	776.25	-22.8
12	990.00	742.50	-25	1,060.00	817.50	-22.9
13	1,045.00	783.75	-25	1,115.00	858.75	-23.0

	Hospital Health Permit Bands Petrol & Diesel (compliant) - Permit Price			Hospital Health Permit Bands Diesel (non-compliant) - Permit Price		
Emission Band	Charges 23/24	Proposed Charges 24/25	% Increase	Charges 23/24	Proposed Charges 24/25	% Increase
0	270.00	290.79	7.7			
1	385.00	414.65	7.7	455.00	489.65	7.6
2	440.00	473.88	7.7	510.00	548.88	7.6
3	495.00	533.12	7.7	565.00	608.12	7.6
4	550.00	592.35	7.7	620.00	667.35	7.6
5	605.00	651.59	7.7	675.00	726.59	7.6
6	660.00	710.82	7.7	730.00	785.82	7.6
7	715.00	770.06	7.7	785.00	845.06	7.7
8	770.00	829.29	7.7	840.00	904.29	7.7
9	825.00	888.53	7.7	895.00	963.53	7.7
10	880.00	947.76	7.7	950.00	1,022.76	7.7

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**APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)**

11	935.00	1,007.00	7.7	1,005.00	1,082.00	7.7
12	990.00	1,066.23	7.7	1,060.00	1,141.23	7.7
13	1,045.00	1,125.47	7.7	1,115.00	1,200.47	7.7

Emission Band	Estate Year 1 Permit Bands Petrol & Diesel (compliant) - Permit Price			Estate Year 1 Permit Bands Diesel (non-compliant) - Permit Price		
	Charges 23/24	Proposed Charges 24/25	% Increase	Charges 23/24	Proposed Charges 24/25	% Increase
0	8.75	9.42	7.7			
1	17.50	18.85	7.7	35.00	37.60	7.4
2	21.25	22.89	7.7	38.75	41.64	7.4
3	25.00	26.93	7.7	42.50	45.68	7.5
4	28.75	30.96	7.7	46.25	49.71	7.5
5	32.50	35.00	7.7	50.00	53.75	7.5
6	36.25	39.04	7.7	53.75	57.79	7.5
7	40.00	43.08	7.7	57.50	61.83	7.5
8	43.75	47.12	7.7	61.25	65.87	7.5
9	47.50	51.16	7.7	65.00	69.91	7.6
10	51.25	55.20	7.7	68.75	73.95	7.6
11	55.00	59.24	7.7	72.50	77.99	7.6
12	58.75	63.27	7.7	76.25	82.02	7.6
13	62.50	67.31	7.7	80.00	86.06	7.6

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**APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)**

Emission Band	Estate Year 2 Permit Bands Petrol & Diesel (compliant) - Permit Price			Estate year 2 Permit Bands Diesel (non-compliant) - Permit Price		
	Charges 23/24	Proposed Charges 24/25	% Increase	Charges 23/24	Proposed Charges 24/25	% Increase
0	17.50	18.85	7.7			
1	35.00	37.70	7.7	70.00	75.20	7.4
2	42.50	45.77	7.7	77.50	83.27	7.4
3	50.00	53.85	7.7	85.00	91.35	7.5
4	57.50	61.93	7.7	92.50	99.43	7.5
5	65.00	70.01	7.7	100.00	107.51	7.5
6	72.50	78.08	7.7	107.50	115.58	7.5
7	80.00	86.16	7.7	115.00	123.66	7.5
8	87.50	94.24	7.7	122.50	131.74	7.5
9	95.00	102.32	7.7	130.00	139.82	7.6
10	102.50	110.39	7.7	137.50	147.89	7.6
11	110.00	118.47	7.7	145.00	155.97	7.6
12	117.50	126.55	7.7	152.50	164.05	7.6
13	125.00	134.63	7.7	160.00	172.13	7.6

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

Housing Estates Visitor Vouchers			
Duration	Tariff 23/24	Proposed Tariff 24/25	% Increase
1 Hour	1.80	2.07	15
5 Hours	4.50	5.18	15
1 Day	7.00	8.05	15
1 Week	30.00	34.50	15

Emission Band	Lewisham Homes Staff Daily Permit Bands Petrol & Diesel (compliant)			Lewisham Homes Staff daily Permit Bands Diesel (non-compliant)		
	Charges 23/24	Proposed Charges 24/25	% Increase	Charges 23/24	Proposed Charges 24/25	% Increase
0	0	0.80				
1	1.35	1.59	18.07	3.35	3.74	11.8
2	1.54	1.82	18.19	3.54	3.97	12.2
3	1.73	2.05	18.28	3.73	4.20	12.5
4	1.92	2.28	18.92	3.92	4.43	13.1
5	2.12	2.51	18.37	4.12	4.66	13.1
6	2.31	2.74	18.42	4.31	4.89	13.4
7	2.5	2.96	18.47	4.5	5.11	13.6
8	2.69	3.19	18.51	4.69	5.34	13.8
9	2.88	3.41	18.54	4.88	5.56	14.0
10	3.08	3.64	18.19	5.08	5.79	14.0
11	3.27	3.88	18.57	5.27	6.03	14.4
12	3.46	4.10	18.59	5.46	6.25	14.5
13	3.65	4.33	18.62	5.65	6.48	14.7

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**APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)**

	Councillor Daily Permit Bands Petrol & Diesel (compliant) - Permit Price			Councillor Daily Permit Bands Diesel (non-compliant) - Permit Price		
Emission Band	Charges 23/24	Proposed Charges 24/25	% Increase	Charges 23/24	Proposed Charges 24/25	% Increase
0	0.15	0.00	-100			
1	0.30	0.32	7.7	0.70	0.75	7.7
2	0.34	0.36	7.7	0.74	0.79	7.7
3	0.38	0.41	7.7	0.78	0.84	7.7
4	0.42	0.46	7.7	0.82	0.89	7.7
5	0.47	0.50	7.7	0.87	0.93	7.7
6	0.51	0.55	7.7	0.91	0.98	7.7
7	0.55	0.59	7.7	0.95	1.02	7.7
8	0.59	0.64	7.7	0.99	1.07	7.7
9	0.63	0.68	7.7	1.03	1.11	7.7
10	0.68	0.73	7.7	1.08	1.16	7.7
11	0.72	0.78	7.7	1.12	1.21	7.7
12	0.76	0.82	7.7	1.16	1.25	7.7
13	0.80	0.87	7.7	1.20	1.30	7.7

	Councillor Annual Permit Bands Petrol & Diesel (compliant) - Permit Price			Councillor Annual Permit Bands Diesel (non-compliant) - Permit Price		
Emission Band	Charges 23/24	Proposed Charges 24/25	% Increase	Charges 23/24	Proposed Charges 24/25	% Increase
0	38.50	41.46	7.7			
1	77.00	82.93	7.7	91.00	97.93	7.6
2	88.00	94.78	7.7	102.00	109.78	7.6
3	99.00	106.62	7.7	113.00	121.62	7.6

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**APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)**

4	110.00	118.47	7.7	124.00	133.47	7.6
<b>Emission Band</b>	<b>Charges 23/24</b>	<b>Proposed Charges 24/25</b>	<b>% Increase</b>	<b>Charges 23/24</b>	<b>Proposed Charges 24/25</b>	<b>% Increase</b>
5	121.00	130.32	7.7	135.00	145.32	7.6
6	132.00	142.16	7.7	146.00	157.16	7.6
7	143.00	154.01	7.7	157.00	169.01	7.7
8	154.00	165.86	7.7	168.00	180.86	7.7
9	165.00	177.71	7.7	179.00	192.71	7.7
10	176.00	189.55	7.7	190.00	204.55	7.7
11	187.00	201.40	7.7	201.00	216.40	7.7
12	198.00	213.25	7.7	212.00	228.25	7.7
13	209.00	225.09	7.7	223.00	240.09	7.7

	Staff Daily Permit Bands Petrol & Diesel (compliant)			Staff daily Permit Bands Diesel (non-compliant)		
Emission Band	Charges 23/24	Proposed Charges 24/25	% Increase	Charges 23/24	Proposed Charges 24/25	% Increase
0	0.74	0.80	7.7			
1	1.48	1.59	7.7	3.48	3.75	7.7
2	1.69	1.82	7.7	3.69	3.97	7.7
3	1.9	2.05	7.7	3.9	4.20	7.7
4	2.12	2.28	7.7	4.12	4.44	7.7
5	2.33	2.51	7.7	4.33	4.66	7.7
6	2.54	2.74	7.7	4.54	4.89	7.7
7	2.75	2.96	7.7	4.75	5.12	7.7
8	2.96	3.19	7.7	4.96	5.34	7.7
9	3.17	3.41	7.7	5.17	5.57	7.7
10	3.38	3.64	7.7	5.38	5.79	7.7
11	3.6	3.88	7.7	5.6	6.03	7.7

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**APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)**

12	3.81	4.10	7.7	5.81	6.26	7.7
13	4.02	4.33	7.7	6.02	6.48	7.7

Emission Band	Staff Annual Permit Bands Petrol & Diesel (compliant)			Staff Annual Permit Bands Diesel (non-compliant)		
	Charges 23/24	Proposed Charges 24/25	% Increase	Charges 23/24	Proposed Charges 24/25	% Increase
0	192.50	207.32	7.7			
1	385.00	414.65	7.7	455.00	489.65	7.6
2	440.00	473.88	7.7	510.00	548.88	7.6
3	495.00	533.12	7.7	565.00	608.12	7.6
4	550.00	592.35	7.7	620.00	667.35	7.6
5	605.00	651.59	7.7	675.00	726.59	7.6
6	660.00	710.82	7.7	730.00	785.82	7.6
7	715.00	770.06	7.7	785.00	845.06	7.7
8	770.00	829.29	7.7	840.00	904.29	7.7
9	825.00	888.53	7.7	895.00	963.53	7.7
10	880.00	947.76	7.7	950.00	1,022.76	7.7
11	935.00	1,007.00	7.7	1,005.00	1,082.00	7.7
12	990.00	1,066.23	7.7	1,060.00	1,141.23	7.7
13	1,045.00	1,125.47	7.7	1,115.00	1,200.47	7.7

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**APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)**

Emission Band	Resident Permit Bands Petrol & Diesel (compliant)			Resident Permit Bands Diesel (non-compliant)		
	Charges 23/24	Proposed Charges 24/25	% Increase	Charges 23/24	Proposed Charges 24/25	% Increase
0	38.5	41.46	7.7			
1	77	82.93	7.7	147	157.93	7.4
2	93.5	100.70	7.7	163.5	175.70	7.5
3	110	118.47	7.7	180	193.47	7.5
4	126.5	136.24	7.7	196.5	211.24	7.5
5	143	154.01	7.7	213	229.01	7.5
6	159.5	171.78	7.7	229.5	246.78	7.5
7	176	189.55	7.7	246	264.55	7.5
8	192.5	207.32	7.7	262.5	282.32	7.6
9	209	225.09	7.7	279	300.09	7.6
10	225.5	242.86	7.7	295.5	317.86	7.6
11	242	260.63	7.7	312	335.63	7.6
12	258.5	278.40	7.7	328.5	353.40	7.6
13	275	296.18	7.7	345	371.18	7.6

Resident Motorcycles Permit Bands			
Emissions (g/km CO2)	Charges 23/24	Proposed Charges 24/25	% Increase
Electric Motor Cycle	Free	Free	0
Up to 70	20.00	21.54	7.7
71 - 90	30.00	32.31	7.7
91 - 100	35.00	37.70	7.7
101+	42.00	45.23	7.7

Visitors Permit Bands			
Duration	Tariff 23/24	Proposed Tariff 24/25	% Increase

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

1 Hour	1.8	1.94	7.7
5 Hours	4.5	4.85	7.7
1 Day	7	7.54	7.7
1 Week	30	32.31	7.7

Emission Band	Pay to Park Permit Bands Petrol & Diesel (compliant) - Hourly Rate			Pay to Park Permit Bands Diesel (non-compliant) - Hourly Rate		
	Charges 23/24	Proposed Charges 24/25	% Increase	Charges 23/24	Proposed Charges 24/25	% Increase
0	1.50	1.62	7.7			
1	2.00	2.15	7.7	4.00	4.30	7.6
2	2.40	2.58	7.7	4.40	4.73	7.6
3	2.90	3.12	7.7	4.90	5.27	7.6
4	3.30	3.55	7.7	5.30	5.70	7.6
5	4.00	4.31	7.7	6.00	6.46	7.6

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

### SERVICE: BEREAVEMENT

Bereavement Services	UNIT	Charges 23/24				Proposed charges 24/25				Resident increase %	Non-resident increase %	Basis for charging
		Basic (£)	VAT	Total 23/24 Resident (£)	23/24 Non-Resident (£)	Basic (£)	VAT	24/25 Resident (£)	24/25 Non-Resident (£)			
<b>Private Graves, Grave Purchase Fee - Residents</b>												
Woodland/ Lawn Grave non-border			Non Vatable	2,310.00	5,937.00		Non Vatable	2,487.00	6,394.00	7.66%	7.70%	Discretionary
Lawn Grave Border			Non Vatable	2,777.00	7,144.00		Non Vatable	2,990.00	7,694.00	7.67%	7.70%	Discretionary
Brockley Cemetery Full Memorial Border Grave Incl First Interment			Non Vatable	3,000.00	3,000.00		Non Vatable	3,231.00	3,231.00	7.70%	7.70%	Discretionary
Full Memorial non-border			Non Vatable	3,175.00	8,158.00		Non Vatable	3,419.00	8,786.00	7.69%	7.70%	Discretionary
Full Memorial Border			Non Vatable	3,497.00	9,251.00		Non Vatable	3,766.00	9,898.00	7.69%	6.99%	Discretionary
Grave for a Child or Cremated Remains			Non Vatable	1,374.00	3,948.00		Non Vatable	1,479.00	4,251.00	7.64%	7.67%	Discretionary
Burial Vault, Brockley Cemetery incl. Standard Memorial			Non Vatable	3,702.00	5,702.00		Non Vatable	3,987.00	6,141.00	7.70%	7.70%	Discretionary
<b>Chambers and Sleeves</b>												
Grave Sleeve		660.00	Non Vatable	731.00	731.00		Non Vatable	787.00	787.00	7.66%	7.66%	Discretionary
Shroud Burial - additional fee		411.00	Non Vatable	455.00	455.00		Non Vatable	490.00	490.00	7.69%	7.69%	Discretionary
<b>Chapel &amp; Sundries</b>												
Use of Chapel		124.00	Non Vatable	137.00	137.00		Non Vatable	147.00	147.00	7.30%	7.30%	Discretionary
Use of Chapel - double time		248.00	Non Vatable	275.00	275.00		Non Vatable	296.00	296.00	7.64%	7.64%	Discretionary
Organist		78.00	Non Vatable	86.00	86.00		Non Vatable	92.00	92.00	6.98%	6.98%	Discretionary

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Use of Organ		30.00	Non Vatable	33.00	33.00		Non Vatable	35.00	35.00	6.06%	6.06%	Discretionary
		<b>Charges 23/24</b>				<b>Proposed charges 24/25</b>						
<b>Bereavement Services</b>	UNIT	<b>Basic (£)</b>	<b>VAT</b>	<b>Total 23/24 Resident (£)</b>	<b>23/24 Non-Resident (£)</b>	<b>Basic (£)</b>	<b>VAT</b>	<b>24/25 Resident (£)</b>	<b>24/25 Non-Resident (£)</b>	<b>Resident increase %</b>	<b>Non-resident increase %</b>	<b>Basis for charging</b>
Transfer of Ownership/ Assignment (RoB <b>With Probate</b> )		72.00	Non Vatable	79.00	79.00		Non Vatable	85.00	85.00	7.59%	7.59%	Discretionary
Transfer of Ownership (RoB- <b>No Probate</b> )		90.00	Non Vatable	130.00	130.00		Non Vatable	140.00	140.00	7.69%	7.69%	Discretionary
Late/ over run fee per 15 minutes		50.00	Non Vatable	55.00	55.00		Non Vatable	59.00	59.00	7.27%	7.27%	Discretionary
<b>Digging/Interment Fee - Private Graves</b>												
Digging/ Interment Fee			Non Vatable	2,132.00	6,339.00		Non Vatable	2,296.00	6,827.00	7.69%	7.70%	Discretionary
Caskets & Large Coffins	<b>Per Ft</b>		Non Vatable	119 per ft	£410 per ft		Non Vatable	128.00	441.00			Discretionary
Interment fee Cremated Remains			Non Vatable	329.00	948.00		Non Vatable	354.00	1,020.00	7.60%	7.59%	Discretionary
Interment fee Cremated Remains			Non Vatable	506.00	1,066.00		Non Vatable	544.00	1,148.00	7.51%	7.69%	Discretionary
Interment fee Cremated Remains			Non Vatable	664.00	1,164.00		Non Vatable	715.00	1,253.00	7.68%	7.65%	Discretionary
Interment fee for a Child under 2 years of age			Non Vatable	-	351.00		Non Vatable	no charge	378.00		7.69%	Discretionary
Interment fee for a Child Over 2 but Under 16 years			Non Vatable	-	1,847.00		Non Vatable	no charge	1,989.00		7.69%	Discretionary
Saturday Burial Supplement			Non Vatable	914.00	1,829.00		Non Vatable	984.00	1,969.00	7.66%	7.65%	Discretionary
Sunday Burial Supplement			Non Vatable	1,219.00	2,439.00		Non Vatable	1,312.00	2,626.00	7.63%	7.67%	Discretionary
Saturday Burial Supplement <b>with chapel</b>			Non Vatable	1,073.00	2,107.00		Non Vatable	1,155.00	2,269.00	7.64%	7.69%	Discretionary

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Sunday Burial Supplement with chapel			Non Vatable	1,378.00	2,750.00		Non Vatable	1,484.00	2,961.00	7.69%	7.67%	Discretionary
<b>Memorial Fees</b>												
		<b>Charges 23/24</b>				<b>Proposed charges 24/25</b>						
<b>Bereavement Services</b>	UNIT	Basic (£)	VAT	Total 23/24 Resident (£)	23/24 Non-Resident (£)	Basic (£)	VAT	24/25 Resident (£)	24/25 Non-Resident (£)	Resident increase %	Non-resident increase %	Basis for charging
Permit fee			Non Vatable	354.00	1,295.00		Non Vatable	381.00	1,394.00	7.63%	7.64%	Discretionary
Additional Inscription			Non Vatable	100.00	292.00		Non Vatable	107.00	314.00	7.00%	7.53%	Discretionary
<b>Public Graves - Residents Only</b>												
Interment Fee - public graves			Non Vatable	1,014.00	not available		Non Vatable	1,014.00	not available	0.00%		Discretionary
Memorial Fee - public graves			Non Vatable	77.00	not available		Non Vatable	82.00	not available	6.49%		Discretionary
<b>Exhumation Fees</b>												
Exhumation			Non Vatable	3,991.00	12,578.00		Non Vatable	4,298.00	13,546.00	7.69%	7.70%	Discretionary
For each additional coffin removed			Non Vatable	1,314.00	3,911.00		Non Vatable	1,415.00	4,212.00	7.69%	7.70%	Discretionary
<b>Crematoria Fees</b>												
Adult Mon-Fri - cremation - before 10am			Non Vatable	756.00	756.00		Non Vatable	814.00	814.00	7.67%	7.67%	Discretionary
Adult Mon-Fri - cremation			Non Vatable	914.00	914.00		Non Vatable	984.00	984.00	7.66%	7.66%	Discretionary
Adult Mon-Fri - cremation - double time			Non Vatable	1,226.00	1,226.00		Non Vatable	1,320.00	1,320.00	7.67%	7.67%	Discretionary
Adult Mon-Fri - cremation - triple time			Non Vatable	1,542.00	1,542.00		Non Vatable	1,660.00	1,660.00	7.65%	7.65%	Discretionary
Adult Mon-Thur - cremation - 4pm			Non Vatable	920.00	920.00		Non Vatable	990.00	990.00	7.61%	7.61%	Discretionary

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Adult Direct Cremation (no service/use of chapel) Residents Only			Non Vatable	375.00	375.00		Non Vatable	375.00	403.00	0.00%	7.47%	Discretionary
Witness Charge Supplement			Non Vatable	22.00	22.00		Non Vatable	23.00	23.00	4.55%	4.55%	Discretionary
				<b>Charges 23/24</b>				<b>Proposed charges 24/25</b>				
<b>Bereavement Services</b>	UNIT	Basic (£)	VAT	Total 23/24 Resident (£)	23/24 Non-Resident (£)	Basic (£)	VAT	24/25 Resident (£)	24/25 Non-Resident (£)	Resident increase %	Non-resident increase %	Basis for charging
Adult - Saturday - cremation			Non Vatable	1,244.00	1,368.00		Non Vatable	1,339.00	1,473.00	7.64%	7.68%	Discretionary
Adult - Saturday Double time - cremation			Non Vatable	1,544.00	1,698.00		Non Vatable	1,662.00	1,828.00	7.64%	7.66%	Discretionary
Adult - Sunday - cremation			Non Vatable	1,660.00	1,825.00		Non Vatable	1,787.00	1,965.00	7.65%	7.67%	Discretionary
Adult Sunday - double time - cremation			Non Vatable	2,084.00	2,293.00		Non Vatable	2,244.00	2,469.00	7.68%	7.68%	Discretionary
<b>Organist Services and use of Organ</b>												
Organist fee, weekday			Non Vatable	86.00	86.00		Non Vatable	92.00	92.00	6.98%	6.98%	Discretionary
Organist, weekday double time			Non Vatable	149.00	149.00		Non Vatable	160.00	160.00	7.38%	7.38%	Discretionary
Organist, Saturday			Non Vatable	130.00	130.00		Non Vatable	140.00	140.00	7.69%	7.69%	Discretionary
Organist, Saturday Double Time			Non Vatable	177.00	177.00		Non Vatable	190.00	190.00	7.34%	7.34%	Discretionary
Organist, Sunday			Non Vatable	177.00	177.00		Non Vatable	177.00	177.00	0.00%	0.00%	Discretionary
Organist, Sunday, Double Time			Non Vatable	263.00	263.00		Non Vatable	283.00	283.00	7.60%	7.60%	Discretionary
Use of Organ			Non Vatable	31.00	31.00		Non Vatable	33.00	33.00	6.45%	6.45%	Discretionary
Late or Over Run Service per 15 minutes			Non Vatable	55.00	55.00		Non Vatable	59.00	59.00	7.27%	7.27%	Discretionary

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Miscellaneous												
Scattering of Cremated Remains from elsewhere			Non Vatable	85.00	85.00		Non Vatable	91.00	91.00	7.06%	7.06%	Discretionary
Customs or duplicate			Non Vatable	39.00	39.00		Non Vatable	42.00	42.00	7.69%	7.69%	Discretionary
		Charges 23/24				Proposed charges 24/25						
Bereavement Services	UNIT	Basic (£)	VAT	Total 23/24 Resident (£)	23/24 Non-Resident (£)	Basic (£)	VAT	24/25 Resident (£)	24/25 Non-Resident (£)	Resident increase %	Non-resident increase %	Basis for charging
Search Fee - up to 4 names			Non Vatable	57.00	57.00		Non Vatable	62.00	62.00	8.77%	8.77%	Discretionary
Simple Cremation			Non Vatable	1,400.00	1,400.00		Non Vatable	1,507.00	1,507.00	7.64%	7.64%	Discretionary
Coffin drop-off			Non Vatable	420.00	420.00		Non Vatable	420.00	452.00	0.00%	7.62%	Discretionary
CFF Administration Fee			Non Vatable	30.00	30.00		Non Vatable	32.00	32.00	6.67%	6.67%	Discretionary
Cremated Remains Holding Fee (after 1 month)			Non Vatable	38.00	38.00		Non Vatable	40.00	40.00	5.26%	5.26%	Discretionary

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

### SERVICE: COMMERCIAL WASTE

Commercial Waste	UNIT	Charges 23/24			Proposed charges 24/25			% change	Basis for charging
		Basic (£)	VAT	Total 23/24 (£)	Basic (£)	VAT	Total 24/25 (£)		
<b>Commercial Waste Contracts</b>									
Refuse 1100 Bin Hire	Quarterly Fee	40.21	0.00	40.21	43.02	0.00	43.02	7%	Traded
Refuse 1100 Bin Collection	Quarterly Fee	269.71	0.00	269.71	288.59	0.00	288.59	7%	Traded
Refuse 770 Bin Hire	Quarterly Fee	35.33	0.00	35.33	37.80	0.00	37.80	7%	Traded
Refuse 770 Bin Collection	Quarterly Fee	237.13	0.00	237.13	253.73	0.00	253.73	7%	Traded
Refuse 360 Bin Hire	Quarterly Fee	19.49	0.00	19.49	20.85	0.00	20.85	7%	Traded
Refuse 360 Bin Collection	Quarterly Fee	148.18	0.00	148.18	158.55	0.00	158.55	7%	Traded
Refuse 240 Bin Hire	Quarterly Fee	15.08	0.00	15.08	16.14	0.00	16.14	7%	Traded
Refuse 240 Bin Collection	Quarterly Fee	133.56	0.00	133.56	142.91	0.00	142.91	7%	Traded
Recycling 1280 Bin Hire	Quarterly Fee	37.47	0.00	37.47	40.09	0.00	40.09	7%	Traded
Recycling 1280 Bin Collection	Quarterly Fee	163.16	0.00	163.16	174.58	0.00	174.58	7%	Traded
Recycling 240 Bin Hire	Quarterly Fee	37.47	0.00	37.47	40.09	0.00	40.09	7%	Traded
Recycling 240 Bin Collection	Quarterly Fee	163.16	0.00	163.16	174.58	0.00	174.58	7%	Traded
Refuse - Sack (25 sacks per roll)	1 roll of sacks (25 sacks)	74.29	0.00	74.29	60.00	0.00	60.00		Traded
Recycling - Sack (10 sacks per roll)	1 roll of sacks (10 sacks)	15.47	0.00	15.47	16.55	0.00	16.55	7%	Traded
<b>Fixed Penalty Notices</b>									
Fly tip - 2 bags up to a small car boot load	Single Fine	£400 (early payment £250)			£400 (early payment £250)				
					£1000 (early payment £650)				
Fly tip - more than a small car boot load	Single Fine								
Littering	Single Fine	£150 (Early payment discount of £90)			£200 (early payment of £140).				

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

### SERVICE: ADULT LEARNING

Adult Learning Lewisham	UNIT	Charges 23/24			Proposed charges 24/25			% change	Basis for charging
		Basic (£)	VAT	Total 23/24 (£)	Basic (£)	VAT	Total 24/25 (£)		
Community Learning course fees	per hour	7.00	0.00	7.00	7.00	0.00	7.00	0.00	Discretionary
Community Learning concessionary course fees	per hour	3.50	0.00	3.50	3.50	0.00	3.50	0.00	Discretionary
Full Cost Recovery Fees	per hour	8.00	0.00	8.00	8.50	0.00	8.50	6.25	Discretionary
ALL café meal deal	meal deal	3.55	0.00	3.55	3.80	0.00	3.80	7.00	Traded
Tea	cup	1.10	0.00	1.10	1.18	0.00	1.18	7.00	Traded
Herbal Tea	cup	1.20	0.00	1.20	1.28	0.00	1.28	7.00	Traded
Coffee	cup	1.20	0.00	1.20	1.28	0.00	1.28	7.00	Traded
Filter Coffee	cup	1.55	0.00	1.55	1.66	0.00	1.66	7.00	Traded
Cappuccino	cup	1.55	0.00	1.55	1.66	0.00	1.66	7.00	Traded
Hot Chocolate	cup	1.55	0.00	1.55	1.66	0.00	1.66	7.00	Traded
Cuppa Soup	cup	1.20	0.00	1.20	1.28	0.00	1.28	7.00	Traded
Water	bottle	1.20	0.00	1.20	1.28	0.00	1.28	7.00	Traded
Can Drinks	can	1.10	0.00	1.10	1.18	0.00	1.18	7.00	Traded
Fruit Juices	Carton	1.10	0.00	1.10	1.18	0.00	1.18	7.00	Traded
Crisps	pack	0.80	0.00	0.80	0.86	0.00	0.86	7.00	Traded
Cereal Bars	pack	1.00	0.00	1.00	1.07	0.00	1.07	7.00	Traded
Chocolates	pack	1.00	0.00	1.00	1.07	0.00	1.07	7.00	Traded
Biscuits	pack	1.00	0.00	1.00	1.07	0.00	1.07	7.00	Traded
Cakes	unit	1.45	0.00	1.45	1.55	0.00	1.55	7.00	Traded
Barista Coffee:									

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Cappuccino	cup	0.00	0.00	0.00	2.30	0.00	2.30	0.00	Traded
		<b>Charges 23/24</b>			<b>Proposed charges 24/25</b>				
<b>Adult Learning Lewisham</b>	UNIT	<b>Basic (£)</b>	<b>VAT</b>	<b>Total 23/24 (£)</b>	<b>Basic (£)</b>	<b>VAT</b>	<b>Total 24/25 (£)</b>	<b>% change</b>	<b>Basis for charging</b>
Latte	cup	0.00	0.00	0.00	2.30	0.00	2.30	0.00	Traded
Flat White	cup	0.00	0.00	0.00	2.30	0.00	2.30	0.00	Traded
Americano	cup	0.00	0.00	0.00	2.00	0.00	2.00	0.00	Traded
Hot Chocolate	cup	0.00	0.00	0.00	2.30	0.00	2.30	0.00	Traded

### SERVICE: ADULT SOCIAL CARE

		Charges 23/24			Proposed charges 24/25				
Adult Social Care	UNIT	Basic (£)	VAT	Total 22/23 (£)	Basic (£)	VAT	Total 24/25 (£)	% change	Basis for charging
			0.20			0.2			
1.1 Non-residential unit cost	per hour	21.14	0.00	21.14	21.14	0.00	21.14	0.00%	Discretionary
1.2 Brokerage cost	Annual charge	300.00	0.00	300.00	323.10	0.00	323.10	7.70%	Discretionary

### SERVICE: HOME OWNERSHIP

		Charges 23/24			Proposed charges 24/25				
Home Ownership	UNIT	Basic (£)	VAT	Total 23/24 (£)	Basic (£)	VAT	Total 24/25 (£)	% change	Basis for charging
Leasehold pre-assignment pack		180.00	0.00	180.00	193.86	0.00	193.86	7.7	Discretionary
Leasehold re-mortgage pack		135.00	0.00	135.00	145.40	0.00	145.40	7.7	Discretionary
Leasehold pre assignment or remortgage pack additional enquires		75.00	0.00	75.00	87.00	0.00	87.00	16.0	Discretionary
Express pre-assignment pack		250.00	0.00	250.00	269.25	0.00	269.25	7.7	Discretionary
Copy of a lease		15.00	0.00	15.00	16.16	0.00	16.16	7.7	Discretionary
Retrospective landlords permission request		300.00	0.00	300.00	323.10	0.00	323.10	7.7	Discretionary

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**APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)**

**SERVICE: HOUSING NEEDS AND REFUGEE SERVICE**

	UNIT	Charges 23/24			Proposed charges 24/25			% change	Basis for charging
		Basic (£)	VAT	Total 23/24 (£)	Basic (£)	VAT	Total 24/25 (£)		
<b>Housing Needs and Refugee Services</b>									
Find Your Home Property Advert (12 partner RPs)	per advert	111	22.20	133.20	119.55	23.91	143.46	7.7	Traded
Housing Medical Service	per assessment	30	6.00	36.00	32.31	6.46	38.77	7.7	Traded

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## APPENDIX Y9: 2024/25 Budget Reductions and Growth Equalities Impact Assessment (EIA)

### Y9a: Budget Reductions EIA

<b>Author</b>	Alex Glanz	<b>Directorate</b>	Chief Executive's	
<b>Date</b>	05/01/2024	<b>Service</b>	Chief Executive's Office	
<b>1. The activity or decision that this assessment is being undertaken for</b>				
The Council's 2024-25 Budget				
<b>2. The protected characteristics or other equalities factors potentially impacted by this decision</b>				
<input checked="" type="checkbox"/> Age	<input checked="" type="checkbox"/> Ethnicity/Race	<input checked="" type="checkbox"/> Religion or belief	<input checked="" type="checkbox"/> Language spoken	<input type="checkbox"/> Other, please define:
<input checked="" type="checkbox"/> Gender/Sex	<input checked="" type="checkbox"/> Gender identity	<input checked="" type="checkbox"/> Disability	<input checked="" type="checkbox"/> Household type	
<input checked="" type="checkbox"/> Income	<input checked="" type="checkbox"/> Carer status	<input checked="" type="checkbox"/> Sexual orientation	<input checked="" type="checkbox"/> Socio Economic status	
<input checked="" type="checkbox"/> Marriage and Civil Partnership	<input checked="" type="checkbox"/> Pregnancy and Maternity	<input type="checkbox"/> Refugee/Migrant/Asylum seeker	<input checked="" type="checkbox"/> Health & Social Care	
<input checked="" type="checkbox"/> Nationality	<input checked="" type="checkbox"/> Employment	<input checked="" type="checkbox"/> Armed forces		
<p>The Council's budget setting process, in terms of how it saves, invests and spends money, impacts all the residents of the borough of Lewisham and by extension, all protected characteristics listed above.</p> <p>This Equality Impact Assessment (EIA) focuses on where the Council has chosen to save money, the anticipated impacts of those savings and the mitigations that have, or will be, put in place to reduce disproportionate negative impact as much as possible.</p> <p>This Assessment is intended to be a cumulative assessment of more detailed EIAs and EIA screenings which have been completed individually for each savings proposal. It contains a summary of the information contained within those individual Assessments and Screenings, as well as background information on the demographics of the residents which Lewisham Council provides services to.</p>				
<b>3. The evidence to support the analysis</b>				
<p>Evidence for this EIA is taken predominantly from the Council's 2021 Census Data. Outlined below is a summary of the demographics within the borough of Lewisham. It should be noted that more detailed information about who is accessing services which the Council provides are held by those service teams. For the purposes of this EIA, evidence has been taken from all residents of Lewisham, as decisions taken on the budget will impact all residents, rather than those who directly utilise services. This is contrary to decisions taken by specific services, where evidence should be primarily taken from service users where appropriate.</p> <p><b><u>Demographic overview</u></b></p> <ul style="list-style-type: none"> <li>- At the 2021 Census, Lewisham had 300,600 residents, an increase of 9% since 2011</li> <li>- 51.5% of residents identify as white, and 26.8% identified their ethnic group within the "Black, Black British, Black Welsh, Caribbean or African"</li> </ul>				

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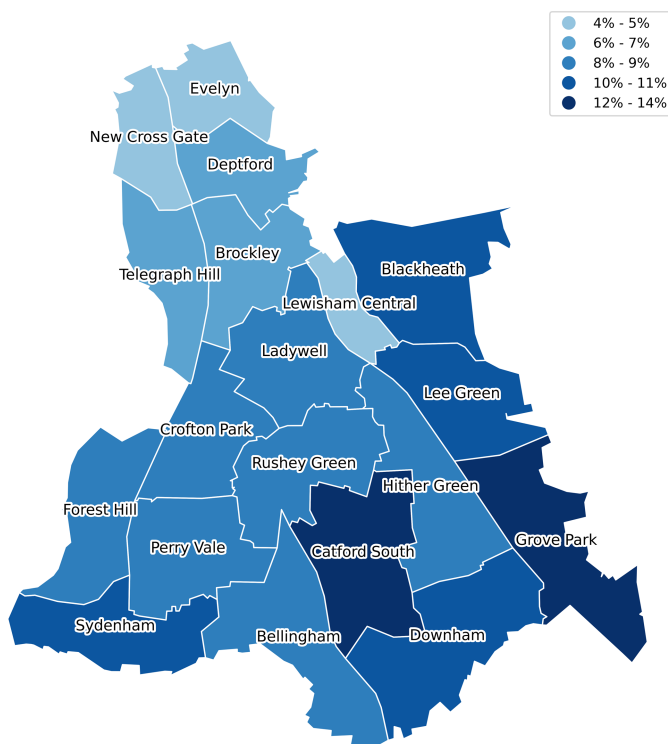
- The percentage of people who identified their ethnic group within the "Asian, Asian British or Asian Welsh" category decreased from 9.3% in 2011 to 9.0% in 2021.
- 23.4% of residents are aged 19 or younger
- 32.5% of residents are married
- 9.6% of residents are aged over 65
- 52.5% of residents are women
- 55.8% identify as having a faith.

### Age

- There are higher percentages of people over 65 living in the south of the borough.
- Lewisham remains a young borough, however the average age has increased from 33.6 in 2011 to 35.2 in 2019
- Incidents of hospitalisation following falls in the 65+ are set to increase in the next 20 years
- The number of 65+ people living on their own is set to increase by 5,600 by 2040
- The number of people living in care homes is set to increase by 400 by 2040.
- Loneliness is associated with depression, sleep problems, impaired cognitive health, heightened vascular resistance, hypertension, psychological stress and mental health problems (Source: [Age UK](#)). In Lewisham, there are many more women who live alone than men.
- The number of people over 65 living on their own in Lewisham is predicted to increase by 5600 by 2040.

Percentage of residents over 65

Source: ONS 2021 Census



### Disability

- A person has a disability if they have a physical or mental impairment which has a substantial and long-term adverse effect on that person's ability to carry out standard day-to-day activities.

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- The number of people with common mental health problems (e.g. depression and anxiety) is set to increase by over 2,494 by 2040 years.
- Total population aged 18-64 predicted to have a learning disability is set to increase by just under 600 by 2040;
- The number of people diagnosed with diabetes in Lewisham is predicted to rise by just under 700 in the next 20 years.
- The cumulative cost of Common Mental Health Disorders to society is great. They comprise different types of depression and anxiety, and include obsessive compulsive disorder. An estimated 23.1% of women and 14.7% of men meet the diagnostic criteria for at least one CMD, which amounts to roughly 40,000 residents within the borough of Lewisham. (Source: Projecting Adult Needs and Service Information, 2023)

### Gender Identity and Reassignment

The 2021 Census was the first time that a question about gender identity had been asked.

- In Lewisham, 7.62% of people aged 16+ did not answer the question, 91.36% have a gender identity the same as their sex registered at birth, 1.02% have a gender identity different from their sex registered at birth.

Gender Identity	Lewisham	London	England
Gender identity the same as sex registered at birth	91.36%	91.21%	93.46%
Gender identity different from sex registered at birth but no specific identity given	0.42%	0.46%	0.25%
Trans woman	0.18%	0.16%	0.1%
Trans man	0.17%	0.16%	0.1%
Non-binary	0.17%	0.08%	0.06%
All other gender identities	0.08%	0.05%	0.04%
<b>Not answered</b>	<b>7.62%</b>	<b>7.88%</b>	<b>5.98%</b>

### Pregnancy and Maternity

- The percentage of mothers known to be smokers at the time of pregnancy has decreased consistently over the last five years both nationally, and within the borough of Lewisham. However, the percentage decrease in Lewisham has been steeper than the London average over that time period.
- In 2017/18, the percentage of mothers who were known to smoker at the time of pregnancy within Lewisham was 5.5%, compared to a 5% London average. In 2022/23 this has decreased to roughly 4.5% within Lewisham, which is now in line with the London average (Source: Office for Health Improvement and Disparities (OHID), Public Health Outcomes Framework)

### Ethnicity

- The ethnic group refers to the group that the person completing the census, which this data is drawn from, feels they belong to. This could be based on their culture, family background, identity or physical appearance.

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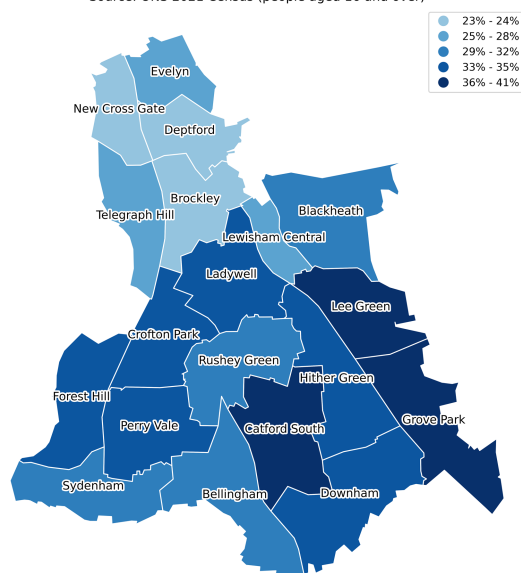
- The majority of people in Lewisham are White, at 51.5%, followed by Black at 26.8% and Asian 9%. 8.1% of people identify as having a Mixed ethnic background and the Other ethnic group makes up 4.7% of the population.
- Whilst White remains the largest ethnic group, it has also seen the biggest decrease of all ethnic groups – down from 53.5% in 2011 to 51.5% in 2021. Mixed or multiple ethnic groups and Other ethnic group have both seen an increase of 0.7% and 2.1% respectively in comparison to 2011 census.
- New Cross Gate, Deptford, and Bellingham are wards with the highest proportion of people whose identified ethnicity is Black, Asian and Multi-Ethnic background.

### Marriage and Civil Partnership

- Of Lewisham residents aged 16 years and over, 53.4% said they had never been married or in a civil partnership in 2021, up from 49.7% in 2011.
- In 2021, just under one in three people (32.5%) said they were married or in a registered civil partnership, compared with 33.3% in 2011. The percentage of adults in Lewisham that had divorced or dissolved a civil partnership decreased from 8.1% to 8.0%. It should be noted that these figures include same-sex marriages and opposite-sex civil partnerships in 2021, neither of which were legally recognised in England and Wales in 2011.

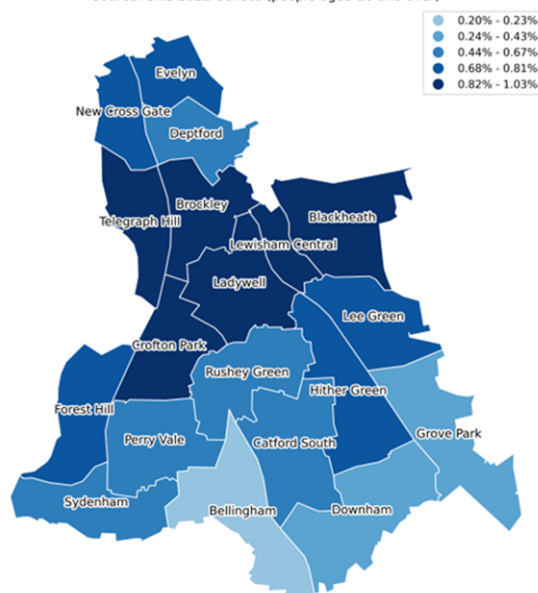
Percentage of residents who are married (opposite sex or same sex)

Source: ONS 2021 Census (people aged 16 and over)



Percentage of residents who are in a same-sex marriage or civil partnership

Source: ONS 2021 Census (people aged 16 and over)



### Language

- 83.8% of people in Lewisham speak English as their main language. In keeping with the diversity of the Borough, a large minority identified a language other than English as their main language (16.2%), higher than the national average of 9.2%.
- The most common main languages, other than English, were: Spanish (2.36%), Portuguese (1.08%), Polish (0.92%), and Chinese (0.92%).
- Lewisham had nearly 80% of households where all adults in a household speak English. There are 9.1% households where no people in a household speak English.

### Religion or belief

- 36.7% of Lewisham residents reported having "No religion", up from 27.2% in 2011. The rise of 9.5 percentage points was the largest increase of all broad religious

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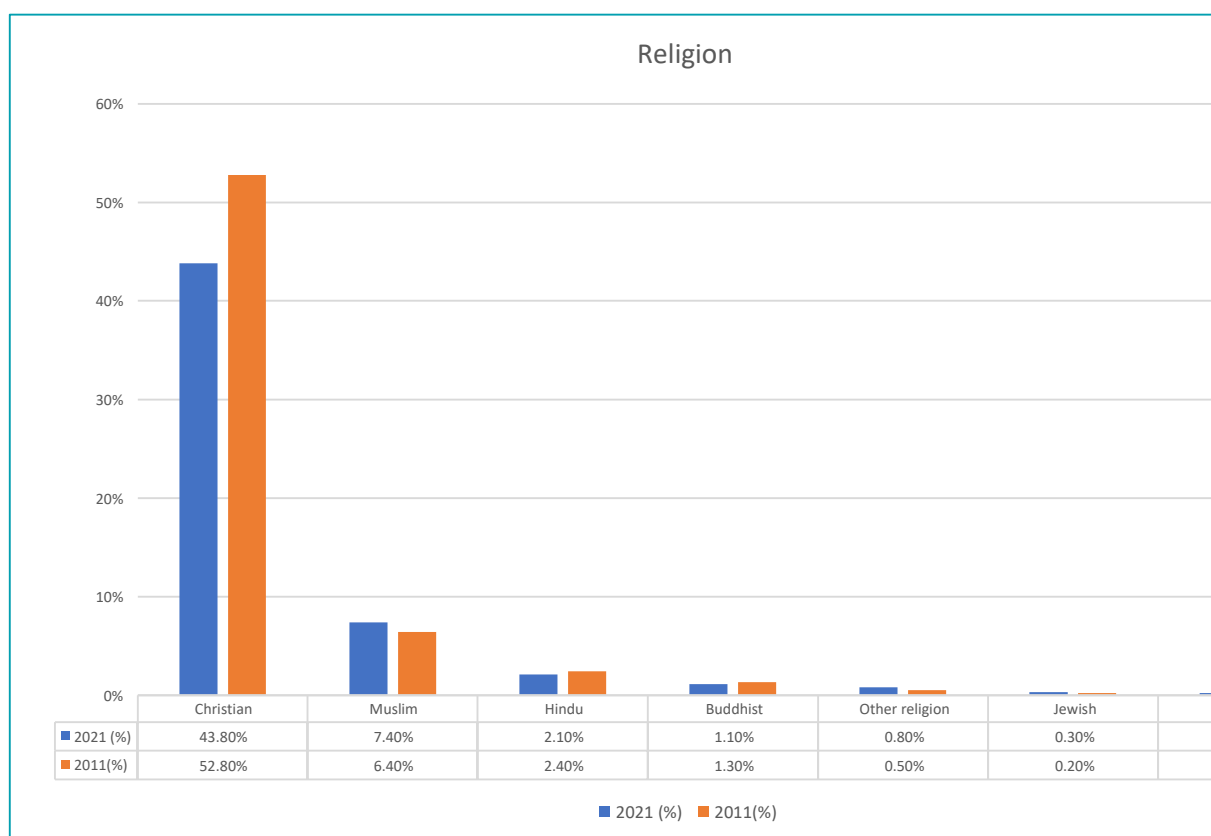
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groups in Lewisham. Across London, the percentage of residents who described themselves as having "No religion" increased from 21.0% to 27.1%, while across England the percentage increased from 24.8% to 36.7%.

- In 2021, 43.8% of people in Lewisham described themselves as Christian
- Following "no religion" and Christian, the next highest percentage was "Muslim" which 7.4% of residents identified with.



### Sex

- There are fewer women than men in under 9-year-olds, whereas there are more women than men in all age groups above the age of 20.
- The sex difference is most pronounced in the 25 to 34-year-olds, 35 to 49-year-olds, and 50 to 64-year-olds. Women in these three age brackets account for 32.24% (29.25% in 2011) of Lewisham's total population, while men account for 28.5% (28.31% in 2011).
- The proportion of 25 to 34-year-old women has increased by 0.5 percentage points (pp), while the proportion of men in the same age category has decreased 1.04 pp.
- Similarly, the proportion of 35 to 49-year-old women has increased by 0.3pp, whereas for men in this age bracket there has been a decrease of 0.47pp.
- In contrast, the proportions of both men (1.7pp) and women (2.21pp) in the 50 to 64-year-old bracket have increased from 2011.

### Sexual Orientation

- 2021 was the first time this question had been asked in the survey and so comparable baseline data is challenging.
- In Lewisham, 6.14% identified as lesbian, gay, bisexual, or other (LGB+), nearly twice that of the 3.1% for England.
- 84.12% identified as straight or heterosexual, lower than in England (89.4%).

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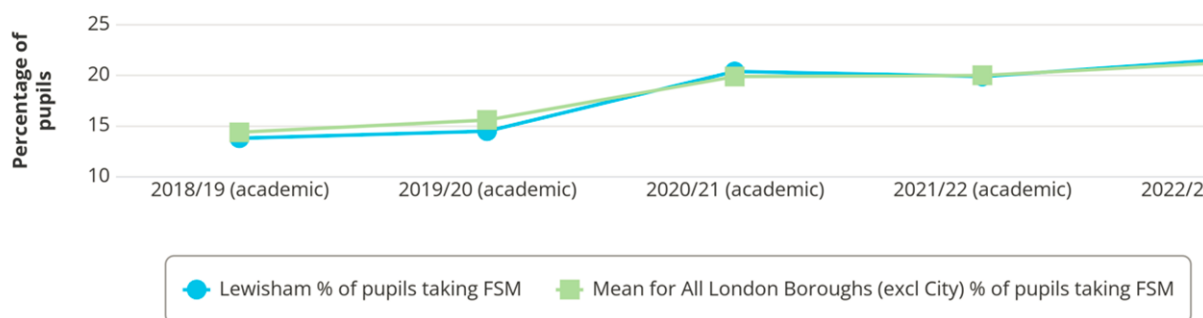
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**Socio-Economic Disadvantage**

- 16.4% of the population was income-deprived in 2019. Of the 316 local authorities in England (excluding the Isles of Scilly), Lewisham is ranked 51st most income-deprived.
- In the least deprived neighbourhood in Lewisham, 4.0% of people are estimated to be income-deprived. In the most deprived neighbourhood, 33.4% of people are estimated to be income-deprived. The gap between these two, is referred to as internal disparity, is 29.4 percentage points in Lewisham
- In November 2023, Lewisham Foodbank reported a growing need for food support provision, with a 40% increase in demand in 2023 compared to 2022 ([Source](#)). Project manager Sarah Vitty explained in an interview: "Five years ago we were looking at a couple of hundred people a week maximum and now we are feeding 600-800 people a week." ([Source](#)).
- On average, more than 2,000 people are receiving food support per month, compared to 1,400 in 2022. Over 20,000 people have received support this year so far (as of November 2023.)
- Food banks struggle to meet the growing demand which has been outstripping donations since 2022. As of late 2023, only 60% of food support is covered by donations, the remainder needs to be purchased.
- Residents living in the Hither Green, Rushey Green, Bellingham, Perry Vale, and Downham wards were issued the most food aid parcels.
- Beneficiaries that accessed food banks the most were aged between 25-64 years old. The age group of child beneficiaries accessing food banks the most was 5-11 years old.
- The demand level in Lewisham is now at 4.5 times the England average, compared to 3 times before 2019.

**Percentage of all pupils eligible and taking free school meals (from 2018/19 (academic) (academic)) for Lewisham**



**Lewisham Council Staff**

The below figures are correct at time of writing, due to the precise nature of these numbers and the turnover of staff within the Council, the below figures should be taken as indicative of broader trends, rather than precise measurements at time of reading.

- The staff make-up of Lewisham Council is 58.2% female, amounting to 1764 staff, and 41.8% male, amounting to 1266 staff.
- The ethnicity of Lewisham Council’s staff is:
  - Asian: 5.0% (150 staff)
  - Black: 39.6% (1201 staff)
  - Mixed: 5.1% (155 staff)
  - Other: 1.5% (46 staff)
  - White: 44.7% (1354 staff)

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- Unavailable: 4.1% (124 staff)
- 9.3% of Lewisham’s staff are disabled, although it should be noted that no disability data is held on 19.2% of staff.
- 19.1% of Council staff are over 60 years old
- 71.1% of staff are heterosexual, whilst data is not held on 24.1% of staff who have indicated that they prefer not to say.

### 4. The analysis

An individual Equalities Screening, or Equalities Impact assessment has been completed for each proposed Budget savings, as well as for each instance of increased funding for a Directorate.

Below is a table which summarises the cumulative negative and positive impacts of savings, separated by Directorate. It should be noted that many of the savings which identify a potential negative impact on groups who possess a protected characteristic have also identified mitigations which can be enacted to ensure this impact is reduced as far as possible.

In addition to this, where high or medium impacts have been identified by services as a potential result of savings which have been proposed, full equality impact assessments have been completed and are attached to the Budget 2024/25 report as appendices.

It should be noted that in some instances where no impact has been recorded, this is not as a result of the proposed change having no effect on staff or service users. Instead, it may reflect that a mitigation has already been successfully put in place, or there is confidence that mitigations can be implemented which will reduce impact to zero.

Although not officially regarded as a protected characteristic, for the purposes of the analysis below, socio-economic inequality is being taken into consideration alongside protected characteristics. This is as a result of a recommendation from the [Fairer Lewisham Duty](#) for the Council to consider socio-economic disadvantage as part of its decision making processes.

High/ medium/ low negative impacts identified through the EIA Screening process						
	Chief Executive	CYP	Community Services	Corporate Resources	Place	Housing
Age	3	1	1	0	0	0
Disability	2	0	1	0	1	0
Ethnicity	2	0	1	0	0	0
Gender	0	0	1	0	0	0
Gender Reassignment	1	0	0	0	0	0

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Marriage and Civil Partnerships	1	0	0	0	0	0
Pregnancy and Maternity	0	0	1	0	0	0
Religion and Belief	0	0	1	0	0	0
Sexual orientation		0	0	0	0	0
Socio-Economic Inequality	3	0	1	0	0	0
Totals	2 – high/ medium 10 - low	1 – high/ medium 0 - low	0 – high/ medium 7 - low	0 – high/ medium 0 - low	1 – high/ medium 0 - low	0 – high/ medium 0 - low

**High/ medium/ low positive impacts identified through the EIA Screening process**

	Chief Executive	CYP	Community Services	Corporate Resources	Place	Housing
Age	1	2	0	1	0	0
Disability	1	1	1	1	1	0
Ethnicity	1	1	0	1	0	0
Gender	1	0	0	1	1	0
Gender Reassignment	1	0	0	0	0	0
Marriage and Civil Partnerships	1	0	0	0	0	0
Pregnancy and Maternity	1	0	0	0	0	0
Religion and Belief	1	0	0	0	1	0
Sexual Orientation	1	0	0	0	0	0

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Socio-Economic Inequality	1	2	0	0	0	0
<b>Totals:</b>	0 – high/ medium 10 - low	3 – high/ medium 3 - low	1 – high/ medium 0 - low	3 – high/ medium 1 - low	3 – high/ medium 0 - low	0 – high/ medium 0 - low

Cumulative analysis of the data above provides information about the scale of impact that proposed changes are likely to have on residents/ service users within the borough of Lewisham Overall:

- EIA screenings have identified the potential for 21 instances of negative impact on groups possessing protected characteristics.
- Screenings have further identified 24 instances of positive impact on groups possessing protected characteristics.
- A total of 42 EIA screenings were completed as part of the savings process
- A total of 3 full Equality Impact Assessments have been completed as part of this process. Several further EIAs are committed to be delivered once savings have been agreed and work can commence on delivery of proposals.

However, it should be noted that this analysis does not provide detailed information about what specifically the impact will be, or mitigations that are either already in place or intended to be put in place. Some of this information has been provided as part of the impact summary listed below, but more detailed information should be sought from the completed Equality Impact Assessments or Impact Assessment Screenings which are published alongside the Budget.

This analysis also does not recognise disproportionate impact which is not directly related to groups possessing a shared protected characteristic or facing socio-economic inequality. An example of this is impact which could be caused to those who speak a different language, serve in the armed forces or service users who are uneasy about changing the setting in which they interact with the Council, with no specificity about who those service users may be. These impacts have been identified through full EIAs, which expand the focus on those impacted and are not limited to those possessing protected characteristics in the way in which EIA screenings are.

### 5. Impact summary

The impact of proposed budget savings in specific areas has been broken down into Council Directorates, and within those sections, into Divisions within the Council. Although there are some savings which cut across multiple Divisions, the majority can be assessed on the basis of the Directorate which is primarily responsible for their delivery.

#### **Chief Executive's Office**

The budget for the Chief Executive's Office provides funding for the following Council Divisions:

- Communications and Engagement
- Law and Corporate Governance
- People and Organisational Development

Savings proposals from this Directorate are anticipated to have a minimal direct impact on service users as a result of the Directorate's function primarily providing corporate support to other Council officers, rather than providing a direct service to residents. Budget changes to

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his area will predominantly impact Council staff, although there some changes will impact on residents.

In terms of protected characteristics, changes from this Directorate are likely to have a disproportionate impact on age as a result of changes to Lewisham Life primarily affecting this area, and other changes having a minimal impact across all areas. For those without internet access, Lewisham Life can act as a key source of information, and although the Council's 2021 residents survey identified that 94% of Lewisham residents are internet users, it also highlighted non-internet usage is significantly higher among:

- The Financially Stretched ACORN category (13%)
- Those aged 75+ (45%)

The Fairer Lewisham Duty outlines the Council's responsibility to take account of and attempt to mitigate the impact of changes on people who are disadvantaged as a result of their socio-economic status, as well as the intersectional impact of changes such as this one. The specific proposal relating to Lewisham Life is being mitigated through attempts to seek sponsorship and raise funds so publication of Lewisham Life can resume on a quarterly basis. It is felt that through this mitigation, the equalities impact of this change can be reduced or eliminated entirely.

Other changes within the Chief Executive's Directorate relating to the Civic Events Function, Policy Team, Executive Support Team and People and OD team will all have a staffing impact in terms of potentially increasing workload for Council Officers. There are no substantial or disproportionate equalities implications for these changes, but all impacts are being mitigated through monitoring by relevant line managers and strategic service planning to ensure capacity is used effectively.

Specific EIA screenings carried out for each of the proposed savings that impact staff have not identified any disproportionate impact with regards to protected characteristics on the staff who are affected. This is as a result of changes being made to vacant roles, and therefore impacts being across entire teams, rather than being felt by individuals.

Changes made within the Electoral Services Team also broadly have a neutral or minimal impact. The saving to remove non-statutory freepost reply envelope and scanning service is noted for its potential impact on those who are more likely to vote by post. However, it is noted that Lewisham now receives a higher percentage of online responses than any other London authority. In order to ensure the impact of this change has been fully considered, an Equalities Impact Analysis has been completed.

Additionally, the scrapping of direct letters to households regarding Voter ID is noted to have a low impact on several groups possessing a protected characteristic. The full EIA for this saving details extensive mitigation to reduce this impact, including a new A4 poll card in a reply envelope, with the statutory wording about Voter ID displayed prominently on the front and reverse of the poll card.

### **Housing**

The Budget for the Housing Directorate provides funding for each of the following Divisions:

- Housing Strategy
- Housing Quality and Investment
- Housing Resident Engagement and Services

However, for the purpose of this EIA screening, changes to the budget for the Housing Revenue Account (HRA) are not being focused on. As a result of this, the information

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directly below refers only to the Housing Strategy Division, as this draws on the General Fund.

Savings proposed from within this Division focus on increasing efficiency without reducing the service or quality of service which is being provided. Examples of savings such as this are the reduction of two Property Negotiator posts, capitalising the salary of the Housing Casework Officer to the HRA and increasing savings from the Temporary Accommodation Reduction Project. All of these projects note a neutral impact on anyone possessing a protected characteristic as part of their EIA Screening.

### **Corporate Resources**

The budget for the Corporate Resources Directorate provides funding for each of the following Divisions:

- Finance
- IT and Digital Services
- Resident and Business Services

Savings proposed from within the Finance Division are focused on internal processes which do not interact with service users, such as the internal audit process. IEA screenings for these savings do not identify any impact on those possessing protected characteristics. The savings themselves are focused on the deletion of vacant posts, improving contract efficiency and budget adjustments to remove historical anomalies. Of the five proposed changes from within this Division, there are none which note an impact through their screenings.

Similar to the above, changes proposed to IT and Digital Services have not identified any disproportionate impacts through their screening processes. The savings proposed from this Division focus on the deletion of vacant posts, ceasing using of the recruitment and talent acquisition service, and contractual cost reductions and equipment relocations within the data centres. In addition to a neutral impact on service users, a very minimal impact on staff has been identified as a result of deleted posts having been held vacant for a protracted period of time, and mitigations being put in place to ensure changes to technology utilised by staff is *“co-ordinated, managed and communicated in a way that will cause minimum disruption to staff.”*

Of the three changes proposed to the Resident and Business Services Division, there has been no impact identified through the EIA screening process for either the reduction in printing/ stationary costs or the deletion of posts which have been held vacant for up to one year. Reductions in staff numbers will be mitigated through the recruitment of a new Operations Manager to better manage resources. On a savings proposal titled FM Energy, a positive impact has been identified including three medium impacts, with one low impact. These will affect:

- Age
- Ethnicity
- Gender
- Disability (low impact)

The cause of this positive impact through the saving is noted as a result of invoice validation creating a positive change for service users through improvement the management of our energy payments.

### **Children and Young People**

The budget for the Children and Young People Directorate provides funding to the following areas:

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- Children's Social Care
- Education Services
- Families Quality and Commissioning

Of the four proposals within the Children's Social Care directorate, two savings have identified an impact through the screening process. A saving related to Building Lewisham children's residential homes is identified as having a positive impact. This is as a result of less reliance on placement market and more cost control. An EIA screening identifies a particular positive impact on ethnicity as a result of this change, this is caused by some children in care being able to remain in their community, not placed elsewhere in a part of the country that has less cultural/racial diversity. It is noted in relation to this saving that a full EIA will be completed to ensure that all potential impacts have been properly considered.

A saving from the Children's Social Care Division to reduced spot purchasing of youth support has identified a potential negative impact that more young people could risk entering care if an alternative is not in place. This will disproportionately impact young people, but can be mitigated through the expansion of an 'in house' service as an alternative to commissioned resource.

The Education Services Division has proposed a number of savings measures as part of this budget. Proposed savings to Access, Inclusion and Participation amount to £220k and are identified as having a neutral impact across all groups possessing protected characteristics. This is as a result of analysis already having been carried out over a period of three years which has determined less places are required, and there remains sufficient capacity support the primary aged children in Lewisham schools. It is noted that a reduction in staffing levels may impact on reducing exclusions for Lewisham CYP. However, this will be mitigated by the rollout of initiatives such as Mental Health Support Teams in Schools.

The savings from Short Breaks Review are identified as having a possible negative impact across two characteristics, those who are disabled and those who face socio-economic inequality (although not a protected characteristic, this is reviewed as part of a recommendation from the Fairer Lewisham Duty). This impact is as a result of changes to Targeted Short Breaks may leading to some children receiving reduced packages of support. It should be noted that this will not be universal and some children will receive increased provision as a result of the change. A full EIA screening will be completed as part of the review process to ensure all potential impacts are understood and, where possible, mitigated.

There are no other impacts noted through the screening process for additional savings within the Education Services Division.

There are five proposed savings from within the Families, Quality and Commissioning Division. Of these five, two savings have identified a positive impact on groups possessing a protected characteristic, and three have identified a neutral impact. Positive impacts to service users include ensuring a consistent level of business support across the organisation through changes to ways of working, and plans to redesign service delivery to create a seamless and consistent offer of support that will further prevent inequality of access to service provision. The overall impact for service users will be positive, with anticipated increases in access and more targeted provision to ensure we reach and engage more families from communities not currently accessing existing provision.

It should be further noted that changes proposed from this division are also identified as having either a positive or neutral impact on staff.

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### **Place**

The budget for the Place Directorate provides funding to the following areas:

- Inclusive Regeneration
- Public Realm
- Planning

Two savings proposals have been submitted by the Inclusive Regeneration Division. One of these savings has identified a neutral impact across all assessed areas. This is as a result of utilising S106 to offset any potential risk to planned Jobs and Skills activity, therefore maintaining service provision at its current level.

A proposal from this division relating to Council Offices Rationalisation is identified as impacting those with a disability or those who face health/ social care challenges. Although there is a positive impact identified across a range of protected characteristics because of this change, there are potential risks to staff who access mental health services or who need specific workstations as reasonable adjustments for declared disabilities. A full Equality Impact Assessment has identified a number of mitigations to ensure that transition between buildings is as smooth as possible for the circa 83 staff who currently work in Holbeach. This includes completing a staff survey of those impacted and ensuring that services, such as the Youth Offending Service, are given appropriate space within Laurence House to carry out their work in a manner which is appropriate for their service users.

It should be noted that positive impacts from the changes referred to above include a reduction in concern about anti-social behaviour amongst female staff entering/leaving the Holbeach office, staff and clients benefiting from a more modern building with lifts, accessible toilets, powered doors, and an improvement in facilities for those with a faith a religion.

One saving has been identified by the Public Realm Division. This saving relates to implementing new processes, procedures and management arrangements to increase commercial waste income. There is no projected impact across protected characteristics as a result of this change, and it is noted that staff are trained to support all individuals including those with protected characteristics to deliver an excellent service and support additional needs where required.

### **Community Services**

The budget for the Community Services Directorate provides funding to the following areas:

- Adult Integrated Commissioning
- Systems Transformation
- Adult Social Care
- Communities, Partnerships and Leisure
- Public Health

It should be noted that a number of proposed changes from this Directorate cut across Divisions within it, and some services are more reliant on external grant funding which does not directly impact the general fund.

Six savings measures have been proposed by Adult Social Care, with none having identified disproportionate negative impacts across protected characteristics. In some instances, this is as a result of an assumption that additional funding will be provided over and above current MTFS assumptions through increased grant funding. In addition to this, one savings also relate to new approaches to re-charging, where service provision will not be reduced, but costs will be carried outside of the Council's General Fund.

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This Division has identified a positive impact through the EIA Screening process in relation to a Care Homes Review Proposal, which will require collaborative multi-disciplinary work arrangements that support providers to manage more complex residents effectively and safely. This saving is identified as having a positive impact on residents who have a disability, primarily as a result of more complex service users being more effectively supported whilst in care homes.

The Communities, Partnerships and Leisure division has proposed three savings which have identified no disproportionate positive or negative impact on either residents or service users through the EIA screening process. Changes proposed by this Division relate to a reduction in funding for the London Youth Games, a reduction in resources to invest in parks infrastructure and a one off Savings of £100K for 2023/24 and 2024/25 from the core budget contribution to the uplift on Salaries at Adult Learning Lewisham.

One saving has been proposed by the Public Health Division, and relates to Neighbourhood Community Development Partnerships (NCDPs). This saving would repurpose funding for NCDPs and they will therefore not restart within the borough, having been paused since the start of the Covid-19 pandemic. As service users that would have been attendees of the NCDP funded projects for the 2019/2020 period include younger residents, residents over 60 years and residents from Black, Asian and Minority Ethnic communities, a disproportionate potential impact from this saving has been identified. However, this impact is assessed as being low, with effective mitigations in place such as the South-East London Integrated Care Board (SEL ICB) work to develop integrated neighbourhood teams that may provide some degree of mitigation to not having NCDPs in place.

### **6. Mitigation**

As a result of the scale and variety of measures, a summary of mitigations has been grouped in the above section (section 5), so they can be more easily read across as to which saving they refer to.

More detailed information on all mitigations that are in place can be found in the individual Equality Impact Screenings and full Equality Impact Assessments.

### **7. Service user journey that this decision or project impacts**

As this impact assessment encompasses a wide range of separate service user journeys and project impacts, this information is provided via the full Equality Impact Screenings and Assessments that have been completed for savings where a negative impact on one or more groups possessing a protected characteristic has been identified.

**Signature of  
Director**

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

### Y9b: Budget Growth EIA

<b>Author</b>	Alex Glanz	<b>Directorate</b>	Chief Executive's
<b>Date</b>	24/01/24	<b>Service</b>	Chief Executive's Office
<p><b>1. The activity or decision that this assessment is being undertaken for</b></p> <p>Cumulatively for allocated funding increases within the Budget 2024/25.</p> <p><i>This EIA is a summary of all Equalities Analyses which have been undertaken in relation to growth funding which has been allocated across Lewisham Council for the 2024/25 Budget.</i></p>			
<p><b>2. The protected characteristics or other equalities factors potentially impacted by this decision</b></p>			
<input checked="" type="checkbox"/> Age	<input checked="" type="checkbox"/> Ethnicity/Race	<input checked="" type="checkbox"/> Religion or belief	<input checked="" type="checkbox"/> Language spoken
<input checked="" type="checkbox"/> Gender/Sex	<input checked="" type="checkbox"/> Gender identity	<input checked="" type="checkbox"/> Disability	<input checked="" type="checkbox"/> Household type
<input checked="" type="checkbox"/> Income	<input checked="" type="checkbox"/> Carer status	<input checked="" type="checkbox"/> Sexual orientation	<input checked="" type="checkbox"/> Socio Economic status
<input checked="" type="checkbox"/> Marriage and Civil Partnership	<input checked="" type="checkbox"/> Pregnancy and Maternity	<input checked="" type="checkbox"/> Refugee/Migrant/Asylum seeker	<input checked="" type="checkbox"/> Health & Social Care
<input checked="" type="checkbox"/> Nationality	<input checked="" type="checkbox"/> Employment	<input checked="" type="checkbox"/> Armed forces	
<p><input type="checkbox"/> Other, please define :</p>			
<p>A decision taken on where growth is allocated across the Council will have an impact on all residents of the borough of Lewisham, and therefore all protected characteristics and equalities factors are impacted. The decision to allocate funding will be a positive impact for all those who utilise the services which will see their budgets increased, some of which are universal services or corporate services which support the delivery of universal ones.</p>			
<p><b>3. The evidence to support the analysis</b></p> <p>Evidence for this EIA is taken predominantly from the Council's 2021 Census Data. Outlined below is a summary of the demographics within the borough of Lewisham. It should be noted that more detailed information about who is accessing services which the Council provides are held by those service teams. For the purposes of this EIA, evidence has been taken from all residents of Lewisham, as well as Lewisham staff.</p> <p>As is noted above, this is as a result of cumulative decisions being taken on the budget impacting all residents. This is contrary to decisions taken by specific services, where evidence will be taken from service users where appropriate.</p>			

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*Please see the supporting evidence detailed in Appendix Y9a ('3. The evidence to support the analysis').*

**4. The analysis**

This Equalities Impact Analysis is a cumulative summary of all EIAs and EIA screenings which have been completed in relation to growth funding which has been allocated in the 2024/25 budget.

All EIAs that have been completed for growth funding have identified either a positive or neutral impact to groups sharing a protected characteristic. Some of these EIAs have identified a high positive impact across specific characteristics, such as the impact of increased funding for the Concessionary Awards Team and the impact that will have on disabled and elderly residents. There is also a cumulative positive impact identified for all staff within Lewisham Council as a result of funding for a nationally agreed salary uplift, and instances where teams are able to be expanded to cope with a substantially increased workload.

As is noted below, there are disproportionalities in terms of some groups receiving a larger positive impact than others because they are disproportionately reflected either in the Council's workforce or its service users. This is noted particularly in relation to increases in funding for Temporary Accommodation and for the Children and Young People Directorate.

**5. Impact summary**

**Staff Salary Funding**

This area of growth refers to the decision to provide funding for salary increases to all Council Officers. The nature of funding increases has been agreed at a national level, and is not a Council decision, therefore the impact of how funding is allocated has not been recognised through the equalities analysis. However, the decision to provide funding for salary increases will have a positive impact across all protected characteristics and equalities factors.

Information on the make-up of the Council's workforce and the representation of groups sharing different protected characteristics is below:

Equality Group	Council staff profile	
	%	No.
<b>Gender</b>		3030
Female	58.2%	1764
Male	41.8%	1266
<b>Ethnicity</b>	100.0%	3030
Asian	5.0%	150

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

Black	39.6%	1201
Mixed	5.1%	155
Other	1.5%	46
White	44.7%	1354
Unavailable	4.1%	124
BME	51.2%	1552
<b>Disability</b>	<b>100.0%</b>	<b>3030</b>
Yes	9.3%	281
No	71.5%	2167
Unavailable	19.2%	582
<b>Sexual orientation</b>	<b>100.0%</b>	<b>3030</b>
Heterosexual	71.1%	2153
LGBTQ+	3.1%	93
PNTS	24.1%	729
Unknown	1.8%	55
<b>Age</b>	<b>100.0%</b>	<b>3030</b>
16-19	0.3%	8
20-29	8.7%	264
30-39	18.4%	557
40-49	22.8%	690
50-59	30.8%	932
60+	19.1%	579
<b>Grade</b>	<b>100.0%</b>	<b>2702</b>
SC3 - SC5	20.0%	541
SC6 -SO2	30.3%	818
PO1 - PO5	33.2%	898
PO6 - PO8	10.5%	283
SMG - Executive	6.0%	162

The Equalities Impact Analysis for the increase in salary funding does specifically note the disproportionate number of white employees at senior levels of the Council, as well the disproportionate number of women who are employed at Lewisham Council. Other disproportionalities are noted throughout the report, but there are no negative impacts identified because of this decision.

### **Legal Services Funding**

This increase in funding for Legal Services is designed to deal with increased demand pressures, particularly within Adult's and Children's Services, as well as disrepair claims. The funding will have a neutral impact across the service as this legal work is required, and funding is intended to resolve a provide support for demand which is already present.

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

It is identified through the Equalities Impact Screening for this increase in funding that a better service will be delivered to all Council clients which are supported by the legal team, and therefore any impact that this decision does have will be positive.

### **Corporate Support for delivery of Quality Housing**

This relates to a decision to invest an additional £1 million in corporate support for the delivery of new housing supply in the borough and the necessary investment in its existing housing stock. There is no impact on staffing associated with this proposal, the funding will support corporate budgets to fund the borrowing and accounting costs of the capital programme.

Although the majority of groups possessing protected characteristics are noted by the Equalities Analysis to be neutrally impacted by this decision, there is a specific positive impact on:

- **Age** – school provision will support our children and young people. Housing will benefit all of those eligible.
- **Disability** – the capital programme includes funding for adaptations to homes to support those who require it.
- **Pregnancy and maternity** - school provision will support new families within the borough.
- **Socio-Economic Status** - improved social infrastructure, in particular housing supports those unable to afford private purchase/rent.

It is further noted in the Equalities Analysis that there will be an additional positive impact for partners of the Council, which may result in improvements for service users. This is because of them relying on physical assets being delivered/improved/maintained via the capital programme, and would include our schools, health partners, TfL, etc...

### **Children and Young People**

This relates to a decision to provide funding primarily focussed towards children and young people. This is associated with funding pressures related to children supported by a social worker and children with SEN needs.

In the last two years, while the number of children in care has reduced as have the number in more expensive residential care, the unit costs for children requiring a higher level of need has increased significantly. This has been recognised as a national pressure by the DfE. Through a range of actions the directorate has been seeking to reduce costs, but it must be recognised that with a national shortage of appropriate residential placements that there are times when the Council has to pay increased fees in order to provide accommodation for children in care and meet its statutory requirements. In addition, due to historic practice the age profile of children in care in Lewisham is higher than average. This means that there are more adolescents with complex needs than would be expected, and a bulge of care leavers which the Council has continued responsibility for. Next year the number of care leavers is expected to start to reduce.

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Each year the number of children identified as having a high level of special educational needs and requiring an Education, Health and Care plan has gone up by roughly 105. Once again this is a national trend. While the direct support costs associated with this increase sits within the High Needs Block of the Dedicated Schools Block, there is also a pressure on the General Fund, in particular Home to School Transport and staffing costs (Educational Psychologists and SEN Caseworkers). Overall, the increased investment here helps the Council to meet its statutory responsibilities in relation to this group of children and young people.

The impact of this funding is registered in the equalities screening as neutral across all groups possessing protected characteristics. This is as a result of much of the work that the funding is allocated to support already being underway. However, it should be noted that, had the Council chosen not to provide this funding, there would have been a significant negative impact across a number of groups possessing a protected characteristic who use the services provided by the Children and Young People Directorate, particularly children. Therefore although this increase in funding has been registered as neutral, the decision to allocate the funding has avoided a negative impact being felt.

**Growth allocation for Temporary accommodation service**

This relates to a decision to allocate base budget growth of £8m and an additional £1.9m one off funding for 2024/25 to help address pressures in the temporary accommodation service. A full Equalities Impact Analysis has been undertaken in relation to this decision, and notes that it will have a positive impact across all protected characteristics and equalities factors.

It is noted in the EIA for this decision that there is disproportionate representation across a number of protected characteristic in terms of homelessness applications. This includes age, race, maternity, ethnicity and income. Some supporting data for this has been included below:

<b>Ethnicity</b>	<b>%</b>
Black or Black British Caribbean	28.7%
Black or Black British African	22.2%
White - English/Welsh/Scottish/Northern Irish/British	20.0%
Refused / Unspecified	7.7%
White Other	4.6%
Other ethnic group - Other	4.4%
White and Black Caribbean	2.9%
Asian or Asian British Other	2.6%

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Black or Black British Other	2.0%
Mixed/Multiple Ethnic - White and Black Caribbean	1.7%
Mixed/Multiple Ethnic - Other	1.3%
Mixed/Multiple Ethnic - White and Black African	0.4%
White Irish	0.4%
Asian or Asian British Bangladeshi	0.2%
Asian or Asian British Chinese	0.2%
Asian or Asian British Indian	0.2%
Asian or Asian British Pakistani	0.2%
Other ethnic group - Arab	0.2%
White Gypsy or Irish Traveller	0.2%
<b>Total</b>	<b>100%</b>

This Equalities Analysis Assessment recognises that the award of the funding will have a greater impact on specific groups because they have a higher representation within the overall service user profile. The impact on these groups will be positive as additional funding will provide the council with more options in which to assist homeless households and help to find properties within the borough and in neighbouring boroughs.

### **Insurance Reserve Unwinding**

This Equalities Impact Screening relates to a decision to unwind a saving of £300k within the Corporate Resources Directorate. An equalities screening has been completed for this decision and notes that there is no impact on any groups sharing a protected characteristic as a result of this.

### **Adult Social Care – General Non-Pay inflation**

This Equalities Impact Screening relates to a decision to allocate a 1% uplift to non-pay related funding within Adult Social Care. It is not anticipated that this decision will have an impact on any group possessing a shared protected characteristic or equalities factor.

### **Public Health Funerals**

This is a proposed increase to the funding for Public Health Funerals, a service the Council provides to arrange funerals for Lewisham residents who are deceased but who have either (a) nobody able to arrange or (b) prepared to arrange the funeral on their behalf. As there is no data gathered that profiles any characteristics for the deceased, equality impacts for this growth have been identified as neutral across all protected characteristics. As managing public health funerals is limited to the team responsible for administering these internally,

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the EIA does not note any impact on partners or other staff as a result of this additional funding.

**Concessionary Awards Team**

This EIA focuses on an increase in funding for the Concessionary Awards Team. This funding allows the team to continue to effectively administer the freedom pass scheme. As this scheme is utilised by elderly and disabled residents, the EIA notes that an increase in funding, and the Council's continued ability to provide this scheme effectively, will have a positive impact across groups possessing those two protected characteristics.

In terms of the scale of this impact, the Freedom Pass is currently provided to 5,752 disabled residents, and is spread across the following age profile:

- Age 65 and over 28,508
- Age 55 – 64 2,001
- Age 45 – 54 1,161
- Age 35 – 44 892
- Aged 25 – 34 801
- Under 25 years of age 423

As a result of the number of people who are positive impacted by the freedom pass scheme, the EIA has identified a high positive impact as a result of this additional funding.

**6. Mitigation**

All decisions listed above relate to increases in funding which is being provided through the budget. As a consequence of this, all impacts that have been noted through the equalities screening/ equalities analysis process are positive or neutral.

Therefore, no mitigations are required to prevent negative impacts.

**7. Service user journey that this decision or project impacts**

As this Equality Impact Assessment is a cumulative summary of a number of separate decisions which are being taken across the Council in relation to growth allocations through the 2024/25 budget, it relates to a large number of potential service user journeys.

Information on these journeys can be found in the specific Equalities Impact Analyses which this EIA has drawn information from.

**Signature of Director**

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## APPENDIX Y10: Making Fair Financial Decisions



**Making fair financial decisions**  
**Guidance for decision-makers**

3<sup>rd</sup> edition, January 2015

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## APPENDICES W1 to Z6 (2024/25 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.

### 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.

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

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](http://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. 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

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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:

#### **• 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.

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### • 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:

**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.

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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?

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.

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## APPENDIX Z1: Interest Rate Forecasts 2024 - 2026

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 8 January 2024, sets out a view that both short and long-dated interest rates will gradually fall, as the Bank of England sees the inflation rate falling. 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 without increasing inflation.

Link now expect the MPC will keep Bank Rate at 5.25% during the first half of 2024 to combat on-going inflationary and wage pressures. We do not think that the MPC will increase Bank Rate above 5.25%.

**Table Z1.1: 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
Mar 2024	5.25	4.5	4.70	5.20	5.00
Jun 2024	5.25	4.40	4.50	5.10	4.90
Sep 2024	4.75	4.30	4.40	4.90	4.70
Dec 2024	4.25	4.2	4.30	4.80	4.60
Mar 2025	3.75	4.1	4.20	4.60	4.40
Jun 2025	3.25	4.00	4.10	4.40	4.20
Sep 2025	3.00	3.80	3.80	4.30	4.10
Dec 2025	3.00	3.70	3.70	4.20	4.00
Mar 2026	3.00	3.60	3.60	4.2	4.00
Jun 2026	3.00	3.60	3.60	4.1	3.90
Sep 2026	3.00	3.50	3.50	4.1	3.90
Dec 2026	3.00	3.50	3.50	4.1	3.90

### PWLB Rates

Gilt yield curve movements have narrowed, with the short part of the curve seeing yields fall through recent weeks whilst the longer-end continues to reflect inflation concerns. At the time of writing there is <30 basis points difference between the 5 and 50 year parts of the curve.

### 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 could keep gilt yields high for longer).

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

- **The Bank of England** has increased the Bank Rate too fast and too far over recent months, and subsequently brings about a deeper and longer UK recession 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: -

- Despite the recent tightening to 5.25%, the **Bank of England proves too timid** in its pace and strength of increases in Bank Rate and, therefore, allows inflationary pressures to remain elevated for a longer period within the UK economy, which then necessitates Bank Rate staying higher for longer than we currently project.
- 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.
- Longer term US treasury yields rise strongly if inflation remains more stubborn there than the market currently anticipates, consequently pulling gilt yields up higher.

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: Extract from 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. These are investments with a body or in an investment scheme described as high quality or with;
  - i. The United Kingdom Government;
  - ii. A local authority in England or Wales (as defined in section 23 of the 2003 Act) or a similar body in Scotland or Northern Ireland;
- Non-specified investments. These are long term investments and any investment that falls outside the minimum counterparty criteria identified within the strategy.

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

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

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.

**Non-Specified Investments:** These are long term investments and any investment that falls outside the minimum counterparty criteria identified within the strategy and do not meet the specified investment criteria. These 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 outlined below.

**Table Z2.1: The Criteria, Time Limits and Monetary Limits of Institution or Investment Vehicles**

	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	£40m	1 year

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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
Term deposits with banks and building societies	Yellow*	£30m	Up to 5 years
	Purple	£25m	Up to 2 years
	Blue	£40m	Up to 1 year
	Orange	£25m	Up to 1 year
	Red	£20m	Up to 6 Months
	Green	£15m	Up to 100 days
	No Colour	Not for use**	Not for use**
CDs or corporate bonds with banks and building societies	Blue	£40m	Up to 1 year
	Orange	£25m	Up to 1 year
	Red	£20m	Up to 6 Months
	Green	£15m	Up to 100 days
	No Colour	Not for use**	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*	£30m	Liquid
	Purple	£25m	
	Blue	£40m	
	Orange	£25m	
	Red	£20m	
	Green	£15m	
	No Colour	Not for use	
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

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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 these differences, we will review the accounting implications of new transactions before they are undertaken.

### Is this report easy to understand?

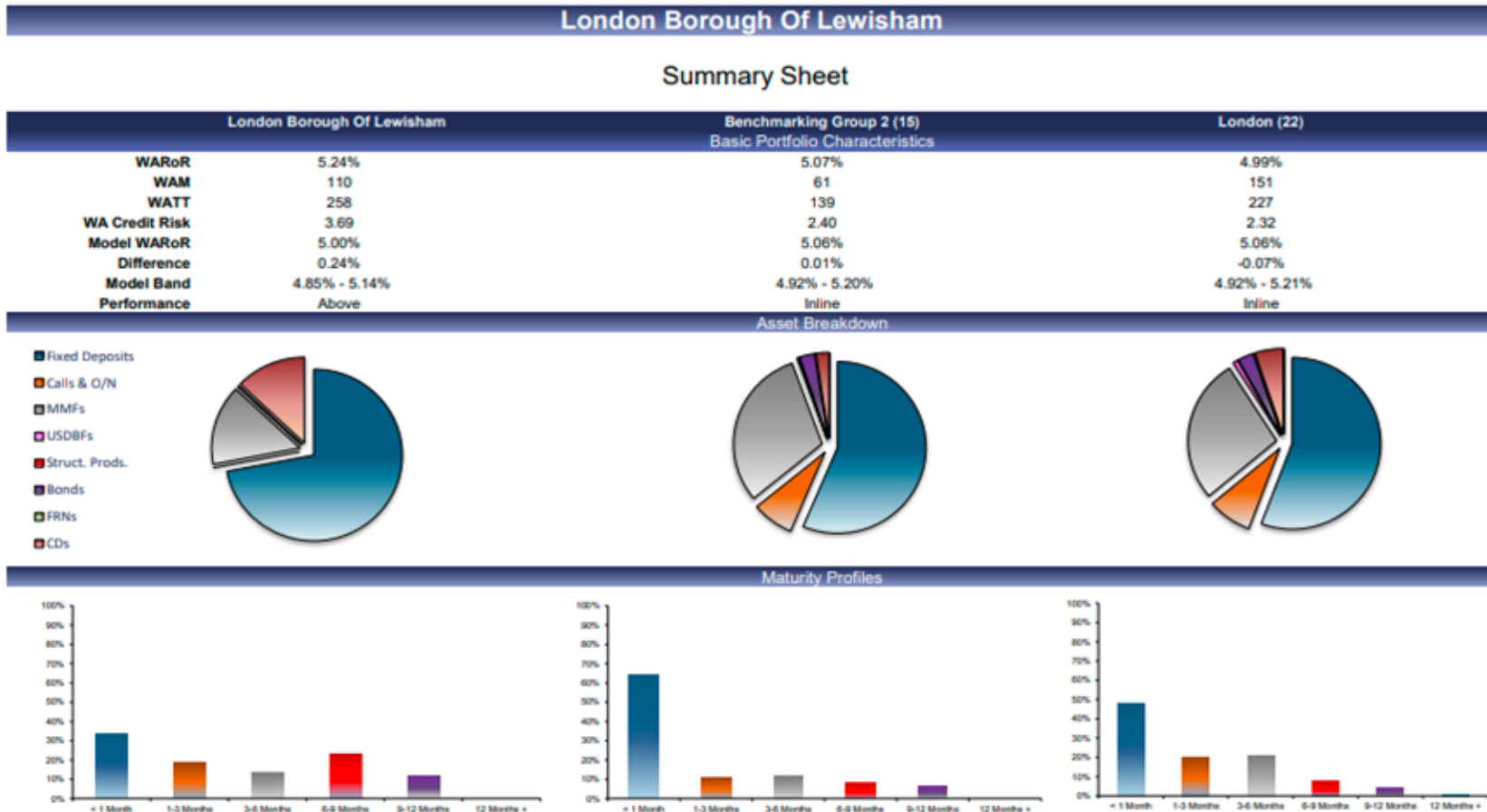
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**APPENDIX Z3: Benchmarking Extract**

The following three pages present an extract, with glossary, of the Council’s treasury benchmarking report as at 30 September 2023.

**Table Z3.1: London Borough of Lewisham Summary Sheet**



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Table Z3.2: London Borough of Lewisham Peer Comparison

London Borough Of Lewisham							
Peer Comparison							
	London Borough Of Lewisham	Benchmarking Group 2 (15)		London (22)		Population Average (229)	
<b>Basic Characteristics</b>							
Principal	£347,400,000	£266,125,348		£252,210,013		£108,273,109	
WARoR	5.24%	5.07%		4.99%		5.09%	
WAM	110	61		151		79	
WATT	258	139		227		154	
WA Credit Risk	3.69	2.40		2.32		2.81	
<b>Portfolio Breakdown</b>							
Fixed Deposits	71.96%	56.36%	14	55.70%	19	54.85%	203
Calls & O/N	0.00%	7.68%	6	8.16%	8	11.44%	158
MMFs	15.08%	30.44%	13	27.19%	18	28.24%	185
USDBFs	0.00%	0.33%	1	0.90%	1	0.67%	13
Struct. Prods.	0.00%	0.00%	0	0.00%	1	0.22%	5
Bonds	0.00%	2.79%	1	2.88%	3	1.42%	13
FRNs	0.00%	0.00%	0	0.00%	0	0.10%	1
CDs	12.95%	2.40%	2	5.17%	3	3.05%	23
<b>Institution Breakdown</b>							
Banks	84.92%	39.03%	13	40.97%	0	45.21%	214
Building Socs.	0.00%	1.70%	3	4.37%	2	2.53%	49
Government	0.00%	28.50%	10	25.73%	20	23.08%	134
MMFs	15.08%	30.44%	13	27.19%	6	28.27%	185
USDBFs	0.00%	0.33%	1	0.90%	1	0.60%	13
MLDBs	0.00%	0.00%	0	0.00%	16	0.09%	1
Other	0.00%	0.00%	0	0.83%	1	0.22%	10
<b>Domestic/Foreign Exposure</b>							
Domestic	23.03%	55.89%	15	59.59%	9	62.02%	222
Foreign	61.89%	13.34%	6	12.32%	1	9.08%	86
MMFs	15.08%	30.44%	13	27.19%	6	28.30%	185
USDBFs	0.00%	0.33%	1	0.90%	1	0.60%	13
<b>Maturity Structure</b>							
< 1 Month	33.79%	63.75%		47.57%		55.13%	
1-3 Months	18.71%	10.89%		19.99%		17.21%	
3-6 Months	12.95%	11.48%		20.73%		16.77%	
6-9 Months	23.03%	7.71%		7.35%		5.46%	
9-12 Months	11.51%	6.16%		4.15%		4.05%	
12 Months +	0.00%	0.00%		0.21%		1.39%	

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Table Z3.3: Definitions for Table Z3.2

<b>WARoR</b>	Weighted Average Rate of Return	This is the average annualised rate of return weighted by the principal amount in each rate.
<b>WAM</b>	Weighted Average Time to Maturity	This is the average time, in days, till the portfolio matures, weighted by principal amount.
<b>WATT</b>	Weighted Average Total Time	This is the average time, in days, that deposits are lent out for, weighted by principal amount.
<b>WA Risk</b>	Weighted Average Credit Risk Number	Each institution is assigned a colour corresponding to a suggested duration using Link Asset Services' Suggested Credit Methodology 1 = Yellow; 1.25 = Pink 1; 1.5 = Pink 2, 2 = Purple; 3 = Blue; 4 = Orange; 5 = Red; 6 = Green; 7 = No Colour
<b>Model WARoR</b>	Model Weighted Average Rate of Return	This is the WARoR that the model produces by taking into account the risks inherent in the portfolio.
<b>Difference</b>	Difference	This is the difference between the actual WARoR and the model WARoR; Actual WARoR minus Model WARoR.

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## APPENDIX Z4: Economic Update from Link Asset Services

### UK Economy (as at 31 December 2023)

- The third quarter of 2023/24 saw:
  - A 0.3% m/m decline in real GDP in October, potentially partly due to unseasonably wet weather, but also due to the ongoing drag from higher interest rates. Growth for the second quarter, ending 30th September, was revised downwards to -0.1% and growth on an annual basis was also revised downwards, to 0.3%;
  - A sharp fall in wage growth, with the headline 3myy rate declining from 8.0% in September to 7.2% in October, although the ONS “experimental” rate of unemployment has remained low at 4.2%;
  - CPI inflation continuing on its downward trajectory, from 8.7% in April to 4.6% in October, then again to 3.9% in November;
  - Core CPI inflation decreasing from April and May’s 31 years’ high of 7.1% to 5.1% in November, the lowest rate since January 2022;
  - The Bank of England holding Bank Rate at 5.25% in November and December;
  - A steady fall in 10-year gilt yields as investors revised their interest rate expectations lower.
- The revision of GDP data in Q2 to a 0.1% q/q fall may mean the mildest of mild recessions has begun. Indeed, real GDP in October fell 0.3% m/m which does suggest that the economy may stagnate again in Q3. The weakness in October may partly be due to the unseasonably wet weather. That said, as the weakness was broad based it may also be the case that the ongoing drag from higher interest rates is more than offsetting any boost from the rise in real wages.
- However, the rise in the flash composite activity Purchasing Managers Index, from 50.7 in November to 51.7 in December, did increase the chances of the economy avoiding a contraction in Q3. The improvement was entirely driven by the increase in the services activity balance from 50.9 to 52.7. (Scores above 50 point to expansion in the economy, although only tepid in this instance.) The press release noted that this was primarily driven by a revival in consumer demand in the technological and financial services sectors. This chimes with the further improvement in the GfK measure of consumer confidence in December, from -24 to -22. The services PMI is now consistent with non-retail services output growing by 0.5% q/q in Q3, but this is in stark contrast to the manufacturing sector where the output balance slumped from 49.2 to 45.9 and, at face value, the output balance is consistent with a 1.5% q/q fall in manufacturing output in Q3.
- The 0.3% m/m fall in retail sales volumes in October means that after contracting by 1.0% q/q (which was downwardly revised from -0.8% q/q) in Q2, retail activity remained weak at the start of Q3. That suggests higher interest rates are taking a bigger toll on real consumer spending.
- Higher interest rates have filtered through the financial channels and weakened the housing market but, overall, it remains surprisingly resilient with the Halifax house price index recently pointing to a 1.7% year on year increase whilst Nationwide’s December data pointed to a -1.8% year on year decrease.

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

However, the full weakness in real consumer spending and real business investment has yet to come as currently it is estimated that around two thirds to a half of the impact of higher interest rates on household interest payments has yet to be felt.

- Overall, we expect real GDP growth to remain subdued throughout 2024 as the drag from higher interest rates is protracted but a fading of the cost-of-living crisis and interest rate cuts in the second half of 2024 will support a recovery in GDP growth in 2025.
- The labour market remains tight by historical standards, but the sharp fall in wage growth seen in October will reinforce the growing belief in markets that interest rates will be cut mid-2024. Wage growth eased in October much faster than the consensus expected. Total earnings fell by 1.6% m/m, which meant the headline 3myy rate eased from 8.0% in September to 7.2% in October. This news will be welcomed by the Bank of England. Indeed, the timelier three-month annualised rate of average earnings growth fell from +2.4% to -1.2%. Excluding bonuses, it fell from 5.3% to 2.0%. Furthermore, one of the Bank's key barometers of inflation persistence, regular private sector pay growth, dropped from 7.9% 3myy to 7.3%, which leaves it comfortably on track to fall to 7.2% by December, as predicted by the Bank in November.
- The fall in wage growth occurred despite labour demand being stronger in October than expected. The three-month change in employment eased only a touch from +52,000 in September to +50,000 in October. But resilient labour demand was offset by a further 63,000 rise in the supply of workers in the three months to October. That meant labour supply exceeded its pre-pandemic level for the first time, and the unemployment rate remained at 4.2% in October. In the three months to November, the number of job vacancies fell for the 17th month in a row, from around 959,000 in October to around 949,000. That has reduced the vacancy to unemployment ratio as demand for labour eases relative to supply, which may support a further easing in wage growth in the coming months.
- CPI inflation fell from 6.7% in September to 4.6% in October, and then again to 3.9% in November. Both these falls were bigger than expected and there are clear signs of easing in domestic inflationary pressures. The fall in core CPI inflation from 5.7% to 5.1% in November was bigger than expected (consensus forecast 5.6%). That's the lowest rate since January 2022. Some of the decline in core inflation was due to the global influence of core goods inflation, which slowed from 4.3% to 3.3%. But some of it was due to services inflation falling from 6.6% to 6.3%. The Bank views the latter as a key barometer of the persistence of inflation and it came in further below the Bank's forecast of 6.9% in its November Monetary Policy Report. This will give the Bank more confidence that services inflation is now on a firmly downward path.
- The Bank of England sprung no surprises with its December monetary policy committee (MPC) meeting, leaving interest rates at 5.25% for the third time in a row and pushing back against the prospect of near-term interest rate cuts. The Bank continued to sound hawkish, with the MPC maintaining its tightening bias saying that "further tightening in monetary policy would be required if there were evidence of more persistent inflationary pressures". And it stuck to the familiar script, saying that policy will be "sufficiently restrictive for sufficiently long" and that "monetary policy is likely to need to be restrictive for an extended period of time". In other words, the message is that the MPC is not yet willing to endorse investors' expectations that rates will be cut as soon as May 2024.

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- Looking ahead, our colleagues at Capital Economics forecast that the recent downward trends in CPI and core inflation will stall over the next few months before starting to decline more decisively again in February. That explains why we think the Bank of England won't feel comfortable cutting interest rates until H2 2024.
- The fall in UK market interest rate expectations in December has driven most of the decline in 10-year gilt yields, which have fallen in line with 10-year US Treasury and euro-zone yields. 10-year gilt yields have fallen from 4.68% in October 2023 to around 3.70% in early January, with further declines likely if the falling inflation story is maintained.
- Investors' growing expectations that the Fed will cut interest rates soon has led to an improvement in risk sentiment, which has boosted the pound and other risky assets. In addition, the rise in the pound, from \$1.21 in November to \$1.27 now, has also been supported by the recent relative decline in UK wholesale gas prices.
- The further fall in 10-year real gilt yields in December has supported the recent rise in the FTSE 100. That said, the index remains 5% below its record high in February 2023. This modest rise in equities appears to have been mostly driven by strong performances in the industrials and rate-sensitive technology sectors. But UK equities have continued to underperform US and euro-zone equities. The FTSE 100 has risen by 2.2% in December, while the S&P 500 has risen by 3.8%. This is partly due to lower energy prices, which have been a relatively bigger drag on the FTSE 100, due to the index's high concentration of energy companies.

**Table Z4.1: High/Low/Average PWLB Rates for 01.04.2023 – 29.12.2023**

	1 Year	5 Year	10 Year	25 Year	50 Year
<b>Low</b>	4.65%	4.13%	4.20%	4.58%	4.27%
<b>Date</b>	06/04/2023	27/12/2023	06/04/2023	06/04/2023	05/04/2023
<b>High</b>	6.36%	5.93%	5.53%	5.96%	5.74%
<b>Date</b>	06/07/2023	07/07/2023	23/10/2023	23/10/2023	23/10/2023
<b>Average</b>	5.60%	5.09%	5.03%	5.35%	5.08%
<b>Spread</b>	1.71%	1.80%	1.33%	1.38%	1.47%
	1 Year	5 Year	10 Year	25 Year	50 Year
<b>Low</b>	4.65%	4.14%	4.20%	4.58%	4.27%
<b>Date</b>	06/04/2023	06/04/2023	06/04/2023	06/04/2023	05/04/2023
<b>High</b>	6.36%	5.93%	5.51%	5.73%	5.45%
<b>Date</b>	06/07/2023	07/07/2023	22/08/2023	17/08/2023	28/09/2023
<b>Average</b>	5.62%	5.16%	5.01%	5.29%	5.00%
<b>Spread</b>	1.71%	1.79%	1.31%	1.15%	1.18%

The peak in medium to longer dated rates has generally arisen in August and September and has been primarily driven by continuing high UK inflation, concerns that gilt issuance may be too much for the market to absorb comfortably, and unfavourable movements in US Treasuries.

The S&P 500 and FTSE 100 have struggled to make much ground through 2023.

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### MPC Meetings 2nd November and 14th December 2023

- On 2nd November, the Bank of England's Monetary Policy Committee (MPC) voted to keep Bank Rate on hold at 5.25%, and on 14th December reiterated that view. Both increases reflected a split vote, the latter by 6 votes to 3, with the minority grouping voting for an increase of 0.25% as concerns about "sticky" inflation remained in place.
- Nonetheless, with UK CPI inflation now at 3.9%, and core inflating beginning to moderate (5.1%), markets are voicing a view that rate cuts should begin in Q1 2024/25, some way ahead of the indications from MPC members. Of course, the data will be the ultimate determinant, so upcoming publications of employment, wages and inflation numbers will be of particular importance, and on-going volatility in Bank Rate expectations and the gilt yield curve can be expected.
- In addition, what happens outside of the UK is also critical to movement in gilt yields. The US FOMC has kept short-term rates in the range of 5.25%-5.50%, whilst the ECB has moved its Deposit rate to a probable peak of 4%. Markets currently expect both central banks to start cutting rates in 2024.

### Creditworthiness

There have been few changes to credit ratings over the quarter under review. However, officers continue to closely monitor these, and other measures of creditworthiness to ensure that only appropriate counterparties are considered for investment purposes.

### Investment Counterparty Criteria

The current investment counterparty criteria selection approved in the TMSS is meeting the requirement of the treasury management function.

### Investment Counterparty Criteria

The current investment counterparty criteria selection approved in the TMSS is meeting the requirement of the treasury management function.

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## **APPENDIX Z5: 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.

Based on the lowest available rating.

### **AAA**

- Australia,
- Denmark,
- Germany,
- Netherlands,
- Norway,
- Singapore,
- Sweden,
- Switzerland.

### **AA+**

- Canada,
- Finland,
- USA.

### **AA**

- Abu Dhabi (UAE).

### **AA-**

- Belgium,
- France,
- Qatar,
- U.K.

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## APPENDIX Z6: 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; and
- 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;

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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

- 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
- ensuring that the authority has adequate expertise, either in-house or externally, to carry out the above.

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