

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

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

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

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

### 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.<br>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<br>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?<br>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<br>Fly-tipping – can be resolved, put in a covered space, and put bins away from the road.<br>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/<br>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        |

DRAFT

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

### 3 Garages

| Feedback:                                                                                                                                                                           |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Garages don't have electricity, so enable to store electric cars.<br>What are the plans for electric charging points?<br>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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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

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

DRAFT

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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                                                                                      | Date: November 2023 |

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

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

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

- 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% |
|----------------------|---------------|----------------------------------------------|-----------------|-----------------|---------------------------|
| Caretaking           | 429           | £3.56                                        | 9.90%           | £0.35           | £3.91                     |
| Grounds Maintenance  | 435           | £2.17                                        | 9.90%           | £0.21           | £2.38                     |
| Communal Lighting    | 397           | £1.84                                        | 9.90%           | £0.18           | £2.02                     |
| Bulk Waste           | 429           | £1.47                                        | 9.90%           | £0.15           | £1.62                     |
| Window Cleaning      | 237           | £0.03                                        | 9.90%           | £0.00           | £0.03                     |
| Resident Involvement | 584           | £0.29                                        | 9.90%           | £0.03           | £0.32                     |
| Customer Services    | 584           | £0.47                                        | 9.90%           | £0.05           | £0.52                     |
| Ground Rent          | 568           | £0.00                                        | 9.90%           | £0.00           | £0.00                     |

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

|                          |     |        |       |       |        |
|--------------------------|-----|--------|-------|-------|--------|
| <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 3: Rent and Service Charge Increase Proposal Report LBL 2024/25

| Briefing for TRA Chairs and the Leaseholder Forum<br>Lewisham Council Rents and Service Charge increase proposal 2024/25 and proposal for the<br>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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| 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.

**If you require any more information about this report, please contact.**

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## APPENDIX X4: Garage Rent Increase 2024/25

| INCLUSIVE REGENERATION<br>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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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)

DRAFT

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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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### 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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|   |            |            |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
|---|------------|------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|   |            |            | 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 | <p>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.</p>                                                                                     |
| 9  | £48,888.00 | 06/11/2023 | <p>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.</p> |
| 10 | £18,031.00 | 06/12/2022 | <p>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.</p>                                                                       |

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

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

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

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

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

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

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

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

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

|                                 |                                                                                                                                                                                                                                         |                                                                                                             |
|---------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------|
|                                 | 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.

DRAFT

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

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

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

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.

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

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

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<br>£,000 | 2024/25<br>£,000 | 2025/26<br>£,000 | 2026/27<br>£,000 | 2027/28<br>£,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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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

- 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.

<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)

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 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<br>£M's | 2024/25<br>£M's | 2025/26<br>£M's | 2026/27<br>£M's | 2027/28<br>£M's |
|-----------------------------------------------|-----------------|-----------------|-----------------|-----------------|-----------------|
| <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            |
| HRA Reserves                                  | <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<br>£M's | 2024/25<br>£M's | 2025/26<br>£M's | 2026/27<br>£M's | 2027/28<br>£M's |
|-----------------------------------------------|-----------------|-----------------|-----------------|-----------------|-----------------|
| <b>Surplus/(deficit) after appropriations</b> | <b>1.8</b>      | <b>-0.8</b>     | <b>-0.9</b>     | <b>-1.0</b>     | <b>-1.8</b>     |
| Opening reserves                              | 7.9             | 9.7             | 8.9             | 8.0             | 7.0             |
| HRA Reserves                                  | <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<br>£M's | 2024/25<br>£M's | 2025/26<br>£M's | 2026/27<br>£M's | 2027/28<br>£M's |
|-----------------------------------------------|-----------------|-----------------|-----------------|-----------------|-----------------|
| <b>Surplus/(deficit) after appropriations</b> | <b>1.8</b>      | <b>-0.2</b>     | <b>-0.4</b>     | <b>-0.7</b>     | <b>-1.7</b>     |
| Opening reserves                              | 7.9             | 9.7             | 9.5             | 9.1             | 8.4             |
| HRA Reserves                                  | <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<br>£M's | 2024/25<br>£M's | 2025/26<br>£M's | 2026/27<br>£M's | 2027/28<br>£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<br>£M's | 2024/25<br>£M's | 2025/26<br>£M's | 2026/27<br>£M's | 2027/28<br>£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<br>£M's | 2024/25<br>£M's | 2025/26<br>£M's | 2026/27<br>£M's | 2027/28<br>£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<br>£M's | 2024/25<br>£M's | 2025/26<br>£M's | 2026/27<br>£M's | 2027/28<br>£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<br>£,000 | 2024/25<br>£,000 | 2025/26<br>£,000 | 2026/27<br>£,000 | 2027/28<br>£,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>Lewisham 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<br>£,000 | 2024/25<br>£,000 | 2025/26<br>£,000 | 2026/27<br>£,000 | 2027/28<br>£,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<br>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)<br>(Phase 3)             | 98     |
| Valentine Court ( Phase 1) (Pack 4)<br>SE23 2LH           | 623    |
| Walsham House Garages ( Pack 5)<br>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>.

<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)

- 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                   |
| 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                                      |

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

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

APPENDIX Y2: 2024/25 Budget Reductions – Agreed in 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<br>CYP12 – FQC Grant Maximisation<br>CYP13 – FQC Sale of Capital Asset<br>CYP14 – FQC Children’s Centre Revenue<br>CYP15 – FQC Staffing Costs Reduction                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |                |                |                |              |
| <b>Cut title</b>                                                                           | <p>1. <u>Reduction in Business Support to FQC.</u><br/>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><br/>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><br>(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<br>2025/26 £k | £1m<br>£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<br>FQC 3 : This assumes the sale of a capital asset as a one off cost saving to the General Fund<br>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<br>(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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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<br>No specific impact |
| Disability                                                    |                            |                                                                                                                                               |                           | X<br>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><br>(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><br>(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><br>(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><br>(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)

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|-----------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <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><br>(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)

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

|                                                                                              |                                                                                                                |     |                        |     |
|----------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------|-----|------------------------|-----|
| <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><br>(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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|                                                                                               |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |           |                             |
|-----------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------|-----------------------------|
| <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><br>(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>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | N         | <b>Number of staff</b> 0    |
| <b>Public consultation</b>                                                                    | <b>Y/N</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | N         | <b>Audience(s)</b>          |
| <b>Investment required</b><br>(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                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |           |                             |

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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. |
|---------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

### 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. |  |  |   |

DRAFT

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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><br>(including any specific elements or phasing to be considered) | 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><br>(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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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

### 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><br>(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><br>(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.<br><b>General Fund</b><br>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:<br>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.<br>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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|                                                                                              |                                                                                           |   |                        |                              |
|----------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------|---|------------------------|------------------------------|
| <b>Member or Officer decision</b>                                                            | Officer                                                                                   |   |                        |                              |
| <b>Redundancies</b>                                                                          | <b>Y/N</b>                                                                                | Y | <b>Number of staff</b> | <b>Potential 2 (2024/25)</b> |
| <b>Public consultation</b>                                                                   | <b>Y/N</b>                                                                                | N | <b>Audience(s)</b>     |                              |
| <b>Investment required</b><br>(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>                                            | 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

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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                                                                                                                                                                                                                                                      |                            |                              |                           |         |
| <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       |

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|                                  |                                                                                                                                               |  |  |          |
|----------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------|--|--|----------|
| <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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|                                                                                               |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |     |                     |
|-----------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----|---------------------|
| <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><br>(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>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           | 0   | <b>2024/25 £k</b> 2 |
| <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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|                                                                                              |                                                                                                                                                                                                                                                                                                |   |                        |    |
|----------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---|------------------------|----|
| <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><br>(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

### Impact & Outcomes

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

##### Service Users

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).

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.

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.

The change to the scanning of the forms will have zero impact on service users.

##### Staff

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.

The change to the scanning will have a bigger impact. Staff will have to increase the amount of time they spend scanning the forms.

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).

##### Other Council Services

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.

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| 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/<br>Race         | <input type="checkbox"/> Religion or<br>belief                 | <input checked="" type="checkbox"/> Language<br>spoken       | <input type="checkbox"/> Other, please<br>define: |
| <input type="checkbox"/> Gender/Sex                        | <input type="checkbox"/> Gender<br>identity         | <input checked="" type="checkbox"/> Disability                 | <input checked="" type="checkbox"/> Household<br>type        |                                                   |
| <input type="checkbox"/> Income                            | <input type="checkbox"/> Carer status               | <input type="checkbox"/> Sexual<br>orientation                 | <input checked="" type="checkbox"/> Socio<br>Economic status |                                                   |
| <input type="checkbox"/> Marriage and<br>Civil Partnership | <input type="checkbox"/> Pregnancy<br>and Maternity | <input type="checkbox"/> Refugee/<br>Migrant/ Asylum<br>seeker | <input type="checkbox"/> Health & Social<br>Care             |                                                   |
| <input type="checkbox"/> Nationality                       | <input type="checkbox"/> Employment                 | <input type="checkbox"/> Armed forces                          |                                                              |                                                   |

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

### 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 hours work. This is spread across a 4 month period, and can be spread across 4 members

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

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 phonenumber, 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)

### 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.*

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

|                              |  |
|------------------------------|--|
|                              |  |
| <b>Signature of Director</b> |  |

DRAFT

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|                                                                                               |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |                                                                                                                   |                   |           |
|-----------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------|-------------------|-----------|
| <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><br>(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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|                                                                                              |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |   |                        |    |
|----------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---|------------------------|----|
|                                                                                              | <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><br>(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. |
|---------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

# 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

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| <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) |         |

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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/<br>Race         | <input type="checkbox"/> Religion or<br>belief                 | <input type="checkbox"/> Language<br>spoken       | <input type="checkbox"/> Other, please<br>define: |
| <input type="checkbox"/> Gender/Sex                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     | <input type="checkbox"/> Gender<br>identity         | <input type="checkbox"/> Disability                            | <input type="checkbox"/> Household<br>type        |                                                   |
| <input type="checkbox"/> Income                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | <input type="checkbox"/> Carer status               | <input type="checkbox"/> Sexual<br>orientation                 | <input type="checkbox"/> Socio<br>Economic status |                                                   |
| <input type="checkbox"/> Marriage and<br>Civil Partnership                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | <input type="checkbox"/> Pregnancy<br>and Maternity | <input type="checkbox"/> Refugee/<br>Migrant/ Asylum<br>seeker | <input type="checkbox"/> Health & Social<br>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 |  |
|--------------------------------------|-------------------------------------|---------------------------------------|--|

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

|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |  |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--|
| <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>                                                                                                                                                                                                                |  |
| <h4>4. Mitigation</h4> <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> |  |
| <h4>5. Service user journey that this decision or project impacts</h4> <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>                                                                                                                                                                                                                                                                                                    |  |
| <b>Signature of Director</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |  |

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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><br>(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> |

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

|                                                                                              |                                                                                                                                                                         |                                         |                        |     |
|----------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------|------------------------|-----|
|                                                                                              | 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. |                                         |                        |     |
| <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%                                    |                        |     |
| <b>Impact of making the saving</b>                                                           | <b>GF:</b><br>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.<br><br>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><br>(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                                                                                                                                                                     |                                         |                        |     |

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|                                                   |                                                                                                       |
|---------------------------------------------------|-------------------------------------------------------------------------------------------------------|
| <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. |
|---------------------------------------------------|-------------------------------------------------------------------------------------------------------|

### 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 to service users.

##### Staff

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

There will be no impact to staff.

##### Other Council Services

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

There will be no impact to Council services.

##### Partners

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

There will be no impact to 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       |
| 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?         |  |  | N |   |

|                                                                                        |                                                                                                                                                      |    |            |   |
|----------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------|----|------------|---|
| Directorate                                                                            | Chief Executive                                                                                                                                      |    |            |   |
| Director                                                                               | Jeremy Chambers                                                                                                                                      |    |            |   |
| Service area                                                                           | Mayor's Office                                                                                                                                       |    |            |   |
| Cabinet Portfolio                                                                      | Mayor                                                                                                                                                |    |            |   |
| Reference                                                                              | CEX08 – Mayor's Office Salary & Non-Salary                                                                                                           |    |            |   |
|                                                                                        |                                                                                                                                                      |    |            |   |
| Saving title                                                                           | Mayor's Office                                                                                                                                       |    |            |   |
| Description of saving<br>(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). |    |            |   |
| Division budget                                                                        | Gross £k                                                                                                                                             |    | Net £k     |   |
| Service area budget                                                                    | Gross £k                                                                                                                                             |    | Net £k     |   |
| Saving proposed                                                                        | 2023/24 £k                                                                                                                                           | 12 | 2024/25 £k | 1 |
| Risks:                                                                                 |                                                                                                                                                      |    |            |   |
| Cost shunt to other service? Y/N                                                       | No                                                                                                                                                   |    |            |   |
| Likelihood of making cut in full - %                                                   | 100%                                                                                                                                                 |    |            |   |
| Impact of making the saving                                                            | Minor impact on office expenditure but this can be managed                                                                                           |    |            |   |

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|                                                                                              |                                                                                                                                                |    |                        |    |
|----------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------|----|------------------------|----|
| <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>                                                                          | 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><br>(value of saving shown above should be net of this investment) | Y/N                                                                                                                                            | N  | <b>Cost £k</b>         | NA |
|                                                                                              | <b>In what:</b>                                                                                                                                | NA |                        |    |
| <b>Contingent on other actions / decisions / cross service work</b>                          | NA                                                                                                                                             |    |                        |    |
| <b>Specific legal or statutory considerations</b>                                            | NA                                                                                                                                             |    |                        |    |

| <b>Impact &amp; Outcomes</b>                              |
|-----------------------------------------------------------|
| <b>What is the likely impact of the proposed changes?</b> |
| <b>Service Users</b>                                      |
| None.                                                     |
| <b>Staff</b>                                              |
| None.                                                     |
| <b>Other Council Services</b>                             |
| None.                                                     |

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| Partners                                                                                                                                                             |                            |                              |                           |            |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------|------------------------------|---------------------------|------------|
| 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. |
| Gender reassignment                                                                                                                                                  |                            |                              |                           | No impact. |
| Marriage and civil partnerships                                                                                                                                      |                            |                              |                           | No impact. |
| Pregnancy and maternity                                                                                                                                              |                            |                              |                           | No impact. |
| Religion and belief                                                                                                                                                  |                            |                              |                           | No impact. |
| Sexual orientation                                                                                                                                                   |                            |                              |                           | No impact. |
| Socio-economic inequality                                                                                                                                            |                            |                              |                           | No impact. |
| Is a full EAA required?                                                                                                                                              |                            |                              | No.                       |            |

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|-----------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <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><br>(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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|----------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------|-------------------|--------------|
|                            | <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)

| Risks:                               |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |   |                 |
|--------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---|-----------------|
| Cost shunt to other service? Y       | All directorates to absorb a degree of policy work                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |   |                 |
| Likelihood of making cut in full - % | 100%                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |   |                 |
| Impact of making the saving          | <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>                                                                                                                                                                                                                                                                                                                                                                                                   |   |                 |
| Possible risk mitigation             | <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> |   |                 |
| Other considerations:                |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |   |                 |
| Member or Officer decision           | Officer                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |   |                 |
| Redundancies                         | Y/N                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               | N | Number of staff |

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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><br>(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><br>(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>                                                                                                                                                                                                                                                                                                                                                                                                 | 125,513 | <b>Net £k</b>     | 62,921         |
| <b>Service area budget</b>                                                                    | <b>Gross £k</b>                                                                                                                                                                                                                                                                                                                                                                                                 | 21,095  | <b>Net £k</b>     | 20,680         |
| <b>Saving proposed</b>                                                                        | <b>2023/24 £k</b>                                                                                                                                                                                                                                                                                                                                                                                               |         | <b>2024/25 £k</b> | <b>400,000</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                                                                                                         |         |                   |                |

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|----------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------|----------|------------------------|
| <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>                                                                                                            | <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><br>(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>                                                                                                       | 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> | 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 |

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|---------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------|-------------------|------------------------------------------------------------------------------------------------------------|
| (including any specific elements or phasing to be considered) | <p>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> <p>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</p> |                                                                 |                   |                                                                                                            |
| <b>Division budget</b>                                        | <b>Gross £k</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   | 125,513                                                         | <b>Net £k</b>     | 62,921                                                                                                     |
| <b>Service area budget</b>                                    | <b>Gross £k</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   | 30,893                                                          | <b>Net £k</b>     | 29,750                                                                                                     |
|                                                               |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   | *This is LD Budget (Transitions cuts across various care types) |                   | *Adjusted for CHC only. (Other income is not allocated per service area)<br>46,502<br>Res and Nursing only |
| <b>Saving proposed</b>                                        | <b>2023/24 £k</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 | <b>0</b>                                                        | <b>2024/25 £k</b> | <b>600,000</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>                               | 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                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |                                                                 |                   |                                                                                                            |

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|----------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------|----------|------------------------|--|
|                                                                                              | 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 |          |                        |  |
| <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> |  |
| <b>Public consultation</b>                                                                   | <b>Y/N</b>                                                                                                                                             | <b>N</b> | <b>Audience(s)</b>     |  |
| <b>Investment required</b><br>(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>                          | 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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|-----------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------|---------------|-------------------------------|
| <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><br>(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>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     | 125,513              | <b>Net £k</b> | 62,921                        |
| <b>Service area budget</b>                                                                    | <b>Gross £k</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     | 46,502               | <b>Net £k</b> | 30,984                        |
|                                                                                               |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     | Res and Nursing only |               | *CHC and Client contributions |

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|-------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------|----------------|
| <b>Saving proposed</b>                                                                    | <b>2024/25 £k</b>                                                                                                                                                                                                                                                                                                                                                                           |                                                                                                                                                                                |                        | <b>300,000</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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| <b>Specific legal or statutory considerations</b> | Care Act and CHC Fund policy |
|---------------------------------------------------|------------------------------|

|                                                                                               |                                                                                                                                               |          |                   |                      |
|-----------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------|----------|-------------------|----------------------|
| <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><br>(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>                                                                                                                               | 125,513  | <b>Net £k</b>     | 62,921               |
| <b>Service area budget</b>                                                                    | <b>Gross £k</b>                                                                                                                               | 7,443    | <b>Net £k</b>     | 7,303                |
|                                                                                               |                                                                                                                                               | *MH only |                   | *only CHC Netted off |
| <b>Saving proposed</b>                                                                        | <b>2023/24 £k</b>                                                                                                                             |          | <b>2024/25 £k</b> | <b>650,000</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>                                                                          | Y/N                                                                                                                        | N | <b>Number of staff</b> |
| <b>Public consultation</b>                                                                   | Y/N                                                                                                                        | N | <b>Audience(s)</b>     |
| <b>Investment required</b><br>(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>                          | 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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|-----------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------|-------------------|------------------------|
| <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><br>(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>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | 125,513 | <b>Net £k</b>     | 62,921                 |
| <b>Service area budget</b>                                                                    | <b>Gross £k</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | 21,095  | <b>Net £k</b>     | 20,680                 |
|                                                                                               |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |         |                   | *S75 recharge adjusted |
| <b>Saving proposed</b>                                                                        | <b>2023/24 £k</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |         | <b>2024/25 £k</b> | <b>350,000</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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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

|                                                                                              |                                                                                                                                                                                                                                                                                                                                                                  |          |                        |  |
|----------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------|------------------------|--|
|                                                                                              |                                                                                                                                                                                                                                                                                                                                                                  |          |                        |  |
| <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.<br/>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>                                                                          | <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><br>(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>                                            | 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><br>(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>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | 125,513               | <b>Net £k</b>     | 62,921         |
| <b>Service area budget</b>                                                                    | <b>Gross £k</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | 11,498                | <b>Net £k</b>     | 11,498         |
|                                                                                               |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | *client contributions |                   |                |
| <b>Saving proposed</b>                                                                        | <b>2023/24 £k</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                       | <b>2024/25 £k</b> | <b>150,000</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><br>(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

### 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)

| 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) |
|--|-------------------------------|

## 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                                                                                                                                                           |                            |                              |                           |         |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------|------------------------------|---------------------------|---------|
| What is the likely impact of the proposed changes?                                                                                                                          |                            |                              |                           |         |
| Service Users                                                                                                                                                               |                            |                              |                           |         |
| None anticipated                                                                                                                                                            |                            |                              |                           |         |
| Staff                                                                                                                                                                       |                            |                              |                           |         |
| None anticipated                                                                                                                                                            |                            |                              |                           |         |
| Other Council Services                                                                                                                                                      |                            |                              |                           |         |
| Funding is expected to come from additional sources                                                                                                                         |                            |                              |                           |         |
| Partners                                                                                                                                                                    |                            |                              |                           |         |
| None anticipated                                                                                                                                                            |                            |                              |                           |         |
| 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       |

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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>                                                                          |
| <b>What is the likely impact of the proposed changes?</b>                                             |
| <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<br>(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. |
|-----------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------|

| 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>                                                                                                                                               |                            |                              |                           |         |
| None anticipated                                                                                                                                                            |                            |                              |                           |         |
| <b>Partners</b>                                                                                                                                                             |                            |                              |                           |         |
| Recharged to ICB in accordance with the S75 agreement                                                                                                                       |                            |                              |                           |         |
| <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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|                           |  |  |                                     |   |
|---------------------------|--|--|-------------------------------------|---|
| Sexual orientation        |  |  |                                     | X |
| Socio-economic inequality |  |  |                                     | X |
| Is a full EAA required?   |  |  | No<br>(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                                                                                                                                                           |                            |                              |                           |         |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------|------------------------------|---------------------------|---------|
| What is the likely impact of the proposed changes?                                                                                                                          |                            |                              |                           |         |
| <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<br>(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<br>(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><br>(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>                                                            | <p>The loss of the budget for the London Youth Games, mini marathon and sports talent bursaries will adversely affect young people in the borough depriving them of the opportunity to represent their borough and excel in their chosen sport perhaps effecting their long-term life chances.</p> <p>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.</p>                               |            |                   |                                           |
| <b>Possible risk mitigation</b>                                                               | <p>The level of consultancy support has reduced since placing the Leisure Contract on a sound footing.</p> <p>LYG reputational risk of being the first London Borough to pull out of the games counter to the objectives set out within the recently adopted Physical Activity Strategy. There is a possibility that the local sports clubs and schools will step into entre the LYG AND Mini Marathon if the council removes it support. Advice could be offered to talented athletes on where they can find bursaries and sponsorship to support their development.</p> |            |                   |                                           |

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

|                                                                                              |                                                                                                                                                                                                                                           |   |                        |
|----------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---|------------------------|
|                                                                                              | PFI contractor at Downham Leisure Centre has a contractual responsibility to undertake R&M on the site robust contract monitoring procedures ensure that these works are being completed removing the necessity to spend the contingency. |   |                        |
| <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><br>(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>                          | N/A                                                                                                                                                                                                                                       |   |                        |
| <b>Specific legal or statutory considerations</b>                                            | N/A                                                                                                                                                                                                                                       |   |                        |

### EAA Screening

|                                                           |
|-----------------------------------------------------------|
| <b>Impact &amp; Outcomes</b>                              |
| <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                              |

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

| 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?                                                                                                                                              |                            |                              | 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 |

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

|                                                                                               |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |             |                        |             |
|-----------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------|------------------------|-------------|
| <b>Description of saving</b><br>(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                                                                                                                                                                                                                                                                                                                                                                                                                                        |             |                        |             |
| <b>Likelihood of making cut in full - %</b>                                                   | 100%                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |             |                        |             |
| <b>Impact of making the saving</b>                                                            | 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. |             |                        |             |
| <b>Possible risk mitigation</b>                                                               | <p>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.</p> <p>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.</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><br>(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           |                        |             |
| <b>Contingent on other actions / decisions / cross service work</b>                           |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |             |                        |             |

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

|                                                   |                                                                                                                                                                                                                                                                                           |
|---------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Specific legal or statutory considerations</b> | 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 |
|---------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

| <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 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.   |                            |                              |                           |         |
| <b>Staff</b>                                                                                                                                                                                                                                                                                                                         |                            |                              |                           |         |
| Include evidence to support anticipated impacts, both positive and negative.                                                                                                                                                                                                                                                         |                            |                              |                           |         |
| 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. |                            |                              |                           |         |
| <b>Other Council Services</b>                                                                                                                                                                                                                                                                                                        |                            |                              |                           |         |
| Include evidence to support anticipated impacts, both positive and negative.                                                                                                                                                                                                                                                         |                            |                              |                           |         |
| 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.                                                                       |                            |                              |                           |         |
| <b>Partners</b>                                                                                                                                                                                                                                                                                                                      |                            |                              |                           |         |
| Include evidence to support anticipated impacts, both positive and negative.                                                                                                                                                                                                                                                         |                            |                              |                           |         |
| 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.                                                     |                            |                              |                           |         |
| <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       |

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|                           |  |  |                                   |   |
|---------------------------|--|--|-----------------------------------|---|
| Socio-economic inequality |  |  |                                   | X |
| Is a full EAA required?   |  |  | Y/N (with Corporate Policy input) |   |

|                                                                                               |                                                                                                                                                                                                                                                          |                |                   |  |
|-----------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------|-------------------|--|
| <b>Directorate</b>                                                                            | Community Service                                                                                                                                                                                                                                        |                |                   |  |
| <b>Director</b>                                                                               | James Lee                                                                                                                                                                                                                                                |                |                   |  |
| <b>Service area</b>                                                                           | Parks and Open Spaces                                                                                                                                                                                                                                    |                |                   |  |
| <b>Cabinet Portfolio</b>                                                                      | Culture, Leisure and Communications- Cllr Walsh                                                                                                                                                                                                          |                |                   |  |
| <b>Reference</b>                                                                              | COM09 – Parks Infrastructure Investment                                                                                                                                                                                                                  |                |                   |  |
| <b>Saving title</b>                                                                           | Infrastructure Investment                                                                                                                                                                                                                                |                |                   |  |
| <b>Description of saving</b><br>(including any specific elements or phasing to be considered) | Reduce by 30k revenue budget for parks infrastructure improvements allocated to supplement Greening Fund 2 & NCIL (GF2 & NCIL) projects and other small-scale improvements at locations that have no GF2 & NCIL projects planned.                        |                |                   |  |
| <b>Saving proposed</b>                                                                        | <b>2023/24 £k</b>                                                                                                                                                                                                                                        | <b>£30,000</b> | <b>2024/25 £k</b> |  |
| <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%                                                                                                                                                                                                                                                     |                |                   |  |
| <b>Impact of making the saving</b>                                                            | The main impact will be less resources to invest in parks infrastructure to compliment other GF2 & NCIL works taking place across the borough as well as a loss of budget for small scale improvements at location where no GF2 & NCIL projects planned. |                |                   |  |
| <b>Possible risk mitigation</b>                                                               | Risks a missed opportunity for additional parks investment.<br>Mitigation will be to work within secured GF2 & NCIL allocations                                                                                                                          |                |                   |  |
| <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>                                                                          | Y/N             | N | <b>Number of staff</b> |  |
| <b>Public consultation</b>                                                                   | Y/N             | N | <b>Audience(s)</b>     |  |
| <b>Investment required</b><br>(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>                          | N/A             |   |                        |  |
| <b>Specific legal or statutory considerations</b>                                            | N/A             |   |                        |  |

|                                                           |
|-----------------------------------------------------------|
| <b>Impact &amp; Outcomes</b>                              |
| <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                              |

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

| <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              |
| 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>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | 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><br>(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>£90,000</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>                                                                                                  | <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><br>(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                                                                                                         |          |                        |  |
| <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)

| Partners                                                                                                                                                             |                            |                              |                                   |         |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------|------------------------------|-----------------------------------|---------|
| NCDPs were supported by Community Connections Lewisham so there may be some impact for this partnership initiative by the proposed changes.                          |                            |                              |                                   |         |
| 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 (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>                                                                            | 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><br>(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<br>(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?                                                                                                                   |                            |                              |                           |         |
| Service Users                                                                                                                                                        |                            |                              |                           |         |
| None. Services are not public facing.                                                                                                                                |                            |                              |                           |         |
| Staff                                                                                                                                                                |                            |                              |                           |         |
| None. Changes are not staff related save A-FACT apprentice recruitment.                                                                                              |                            |                              |                           |         |
| Other Council Services                                                                                                                                               |                            |                              |                           |         |
| Minimal. Largely arising through releasing contingency or effective procurement.                                                                                     |                            |                              |                           |         |
| Partners                                                                                                                                                             |                            |                              |                           |         |
| 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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|                                 |  |  |  |    |
|---------------------------------|--|--|--|----|
| 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><br>(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><br>(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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|                                 |  |  |  |    |
|---------------------------------|--|--|--|----|
| 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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|                                                                                               |                                                                                                                                                                                                                                                                                                        |       |                        |       |
|-----------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------|------------------------|-------|
| <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><br>(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><br>(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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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

|                                            |       |
|--------------------------------------------|-------|
| Specific legal or statutory considerations | None. |
|--------------------------------------------|-------|

## Equalities Screening Template: Assurance – Internal Audit

| Impact & Outcomes                                                                                                                                                    |                            |                              |                           |         |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------|------------------------------|---------------------------|---------|
| What is the likely impact of the proposed changes?                                                                                                                   |                            |                              |                           |         |
| Service Users                                                                                                                                                        |                            |                              |                           |         |
| None. IA is not a public facing service.                                                                                                                             |                            |                              |                           |         |
| Staff                                                                                                                                                                |                            |                              |                           |         |
| Minimal. All changes proposed relate to vacant posts. Replacement post is more junior and presents opportunity to recruit early-career individual.                   |                            |                              |                           |         |
| Other Council Services                                                                                                                                               |                            |                              |                           |         |
| None.                                                                                                                                                                |                            |                              |                           |         |
| Partners                                                                                                                                                             |                            |                              |                           |         |
| 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><br>(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>      | <b>250</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 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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|                                                                                              |                                                                                                               |     |                    |     |
|----------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------|-----|--------------------|-----|
| <b>Public consultation</b>                                                                   | <b>Y/N</b>                                                                                                    | N   | <b>Audience(s)</b> | N/A |
| <b>Investment required</b><br>(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)

### Impact & Outcomes

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

#### Service Users

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.

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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>                                            | Resident and Business Services                                                                                                                                         |           |                        |   |
| <b>Director</b>                                               | Maxine Gordon                                                                                                                                                          |           |                        |   |
| <b>Service area</b>                                           | Facilities Management                                                                                                                                                  |           |                        |   |
| <b>Cabinet Portfolio</b>                                      | Finance and Strategy - Cllr de Ryk                                                                                                                                     |           |                        |   |
| <b>Reference</b>                                              | COR05 – FM Energy Post Removal                                                                                                                                         |           |                        |   |
| <b>Saving title</b>                                           |                                                                                                                                                                        |           |                        |   |
| FM Energy                                                     |                                                                                                                                                                        |           |                        |   |
| <b>Description of saving</b>                                  | Reduction of one admin post                                                                                                                                            |           |                        |   |
| (including any specific elements or phasing to be considered) |                                                                                                                                                                        |           |                        |   |
| <b>Division budget</b>                                        | <b>Gross £</b>                                                                                                                                                         | 1,124,309 | <b>Net £k</b>          |   |
| <b>Service area budget</b>                                    | <b>Gross £</b>                                                                                                                                                         | 265,775   | <b>Net £k</b>          |   |
| <b>Saving proposed</b>                                        | <b>2023/24 £k</b>                                                                                                                                                      | <b>25</b> | <b>2024/25 £k</b>      |   |
| <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>                   | 80%                                                                                                                                                                    |           |                        |   |
| <b>Impact of making the saving</b>                            | Technical solution to be implemented which will process school utility invoices. The member of staff is a CYP officer and we make a £25k contribution to their salary. |           |                        |   |
| <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> | 1 |
| <b>Public consultation</b>                                    | <b>Y/N</b>                                                                                                                                                             | N         | <b>Audience(s)</b>     |   |

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|                                                                                       |          |   |         |  |
|---------------------------------------------------------------------------------------|----------|---|---------|--|
| Investment required<br>(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                          |          |   |         |  |
| Specific legal or statutory considerations                                            |          |   |         |  |

EIA

|                                                                                                                                  |
|----------------------------------------------------------------------------------------------------------------------------------|
| <b>Impact &amp; Outcomes</b>                                                                                                     |
| <b>What is the likely impact of the proposed changes?</b>                                                                        |
| <b>Service Users</b>                                                                                                             |
| Invoice validation will be a positive change for service users because it will better improve our management of energy payments. |
| <b>Staff</b>                                                                                                                     |
| One person is affected but this person is employed by the schools and is currently 0.7 (2 days a week).                          |
| <b>Other Council Services</b>                                                                                                    |
| Schools will have the option of providing her with more work or making her role redundant.                                       |
| <b>Partners</b>                                                                                                                  |
| There are no partners involved in this proposed change.                                                                          |

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| <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                                   |                                  |                |
| 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                                |                |

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

|                                                               |                                                                                                                               |         |                        |   |
|---------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------|---------|------------------------|---|
| <b>Directorate</b>                                            | Resident and Business Services                                                                                                |         |                        |   |
| <b>Director</b>                                               | Maxine Gordon                                                                                                                 |         |                        |   |
| <b>Service area</b>                                           | Facilities Management                                                                                                         |         |                        |   |
| <b>Cabinet Portfolio</b>                                      | Finance and Strategy - Cllr de Ryk                                                                                            |         |                        |   |
| <b>Reference</b>                                              | COR11 – FM Receptionist Posts                                                                                                 |         |                        |   |
| <b>Saving title</b>                                           |                                                                                                                               |         |                        |   |
| FM Soft Services                                              |                                                                                                                               |         |                        |   |
| <b>Description of saving</b>                                  | 2 x Receptionist roles.                                                                                                       |         |                        |   |
| (including any specific elements or phasing to be considered) |                                                                                                                               |         |                        |   |
| <b>Division budget</b>                                        | <b>Gross £</b>                                                                                                                | 922,701 | <b>Net £k</b>          |   |
| <b>Service area budget</b>                                    | <b>Gross £</b>                                                                                                                | 841,434 | <b>Net £k</b>          |   |
| <b>Saving proposed</b>                                        | <b>2023/24 £k</b>                                                                                                             | 40      | <b>2024/25 £k</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 saving</b>                            | We are in October and these roles have not been recruited to as yet for 23/24. We will be recruiting to these roles in 24/25. |         |                        |   |
| <b>Possible risk mitigation</b>                               |                                                                                                                               |         |                        |   |
| <b>Other considerations:</b>                                  |                                                                                                                               |         |                        |   |
| <b>Member or Officer decision</b>                             |                                                                                                                               |         |                        |   |
| <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>                                    | <b>Y/N</b>                                                                                                                    | N       | <b>Cost £k</b>         |   |
| (value of saving shown)                                       | <b>In what:</b>                                                                                                               |         |                        |   |

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|                                                                     |  |  |
|---------------------------------------------------------------------|--|--|
| above should be net of this investment)                             |  |  |
| <b>Contingent on other actions / decisions / cross service work</b> |  |  |
| <b>Specific legal or statutory considerations</b>                   |  |  |

### EIA – FOH Receptionists

|                                                                                                                                                                                                                                                                                                                            |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Impact &amp; Outcomes</b>                                                                                                                                                                                                                                                                                               |
| <b>What is the likely impact of the proposed changes?</b>                                                                                                                                                                                                                                                                  |
| <b>Service Users</b>                                                                                                                                                                                                                                                                                                       |
| <p>These posts have been vacant for over a year with no impact on service users. Cover has been arranged and the team are supported by security staff who signpost enquiries in the first instance. The majority of visitors come in relation to housing and they currently have their own staff in the reception area</p> |
| <b>Staff</b>                                                                                                                                                                                                                                                                                                               |
| <p>There are currently no negative impacts identified. Before the end of 23/24 a new Operations Manager will join the team and they will be able to better manage resources.</p>                                                                                                                                           |
| <b>Other Council Services</b>                                                                                                                                                                                                                                                                                              |
| <p>There is no negative impact on any other services.</p>                                                                                                                                                                                                                                                                  |
| <b>Partners</b>                                                                                                                                                                                                                                                                                                            |
| <p>There is no negative impact on any partners.</p>                                                                                                                                                                                                                                                                        |

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| <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              |
| 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                                |                |

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|                                                                                                   |                                                                                                                                                                                          |                       |                                                                                                                                                                                |            |
|---------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------|
| <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><br><br>(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<br><br>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>                                          | Y/N                                                                                                         | N | <b>Cost £k</b>         |
| (value of saving shown above should be net of this investment)      | <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.

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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                                                                                                                                                                                                                                                                         |                            |                              |                           |         |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------|------------------------------|---------------------------|---------|
| What is the likely impact of the proposed changes?                                                                                                                                                                                                                                        |                            |                              |                           |         |
| Service Users                                                                                                                                                                                                                                                                             |                            |                              |                           |         |
| 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.                                               |                            |                              |                           |         |
| Staff                                                                                                                                                                                                                                                                                     |                            |                              |                           |         |
| 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. |                            |                              |                           |         |
| Other Council Services                                                                                                                                                                                                                                                                    |                            |                              |                           |         |
| There is not expected to be any impact on other Council Services.                                                                                                                                                                                                                         |                            |                              |                           |         |
| Partners                                                                                                                                                                                                                                                                                  |                            |                              |                           |         |
| None                                                                                                                                                                                                                                                                                      |                            |                              |                           |         |
| 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       |

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|                                 |  |  |   |   |
|---------------------------------|--|--|---|---|
| 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>                                                                            | 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><br>(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>                                                                  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |                   |                   |           |

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|                                                                                           |                  |   |                        |
|-------------------------------------------------------------------------------------------|------------------|---|------------------------|
| <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.

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)

| 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>                                                                                                                                                                |                            |                              |                           |         |
| 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       |
| <b>Is a full EAA required?</b>                                                                                                                                              |                            |                              | N                         |         |

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|                                                                                                           |                                                                                                                                                                                                                                                                                                                                   |                |                |                   |                |
|-----------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------|----------------|-------------------|----------------|
| <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<br>CYP02 – CSC Placement Payments Efficiency<br>CYP03 – CSC Building Residential Homes<br>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><br><small>(including any specific elements or phasing to be considered)</small> | <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>£220k</b>   | <b>2024/25 £k</b> | <b>£1.150m</b> |
|                                                                                                           |                                                                                                                                                                                                                                                                                                                                   |                |                | <b>2025/26 £k</b> | <b>£1.670m</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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|                                                                                    |                                                                                                                          |                                                                                                                                            |                 |     |
|------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------|-----------------|-----|
|                                                                                    | 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                                       |                                                                                                                                            |                 |     |
| <b>Other considerations:</b>                                                       |                                                                                                                          |                                                                                                                                            |                 |     |
| Member or Officer decision                                                         | officer                                                                                                                  |                                                                                                                                            |                 |     |
| Redundancies                                                                       | Y/N                                                                                                                      | N                                                                                                                                          | Number of staff |     |
| Public consultation                                                                | Y/N                                                                                                                      | N                                                                                                                                          | Audience(s)     |     |
| Investment required<br>(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<br>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<br>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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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.<br><br>Saving: 1,2,4. – No impact<br><br>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<br><br>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<br><br>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<br>No specific impact |
| Disability                                                    |                            |                                                                                                                                               |                           | X<br>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>                                                                           | CYP05 – Primary Phase Commissioning Costs Management Action<br>CYP06 – Participation Team Management Action<br>CYP07 – Lewisham Challenge Management Action<br>CYP08 – Outreach Inclusion Service Management Action Part (a)<br>CYP08 – Outreach Inclusion Service Management Action Part (b)<br>CYP08 – Outreach Inclusion Service Management Action Part (c)                                                                                                       |         |         |         |       |  |       |       |       |       |    |    |     |       |    |   |    |        |   |    |    |         |    |   |    |  |  |  |
| <b>Cut title</b>                                                                           | <b>Edu 4. Primary phase Alternative Provision Commissioning costs – Management action</b><br><br><b>Edu 5. Contribution from the Participation Team – Management action</b><br><br><b>Edu 12. Lewisham Challenge – Management action</b><br><br><b>Edu 14a. Outreach Inclusion Service – Management action</b>                                                                                                                                                       |         |         |         |       |  |       |       |       |       |    |    |     |       |    |   |    |        |   |    |    |         |    |   |    |  |  |  |
| <b>Description of cut</b><br>(including any specific elements or phasing to be considered) | <table border="1"> <thead> <tr> <th>Saving</th> <th>2023/24</th> <th>2024/25</th> <th>Total</th> </tr> <tr> <th></th> <th>£'000</th> <th>£'000</th> <th>£'000</th> </tr> </thead> <tbody> <tr> <td>Edu 4</td> <td>70</td> <td>30</td> <td>100</td> </tr> <tr> <td>Edu 5</td> <td>10</td> <td>0</td> <td>10</td> </tr> <tr> <td>Edu 12</td> <td>0</td> <td>40</td> <td>40</td> </tr> <tr> <td>Edu 14A</td> <td>70</td> <td>0</td> <td>70</td> </tr> </tbody> </table> | Saving  | 2023/24 | 2024/25 | Total |  | £'000 | £'000 | £'000 | Edu 4 | 70 | 30 | 100 | Edu 5 | 10 | 0 | 10 | Edu 12 | 0 | 40 | 40 | Edu 14A | 70 | 0 | 70 |  |  |  |
| Saving                                                                                     | 2023/24                                                                                                                                                                                                                                                                                                                                                                                                                                                              | 2024/25 | Total   |         |       |  |       |       |       |       |    |    |     |       |    |   |    |        |   |    |    |         |    |   |    |  |  |  |
|                                                                                            | £'000                                                                                                                                                                                                                                                                                                                                                                                                                                                                | £'000   | £'000   |         |       |  |       |       |       |       |    |    |     |       |    |   |    |        |   |    |    |         |    |   |    |  |  |  |
| Edu 4                                                                                      | 70                                                                                                                                                                                                                                                                                                                                                                                                                                                                   | 30      | 100     |         |       |  |       |       |       |       |    |    |     |       |    |   |    |        |   |    |    |         |    |   |    |  |  |  |
| Edu 5                                                                                      | 10                                                                                                                                                                                                                                                                                                                                                                                                                                                                   | 0       | 10      |         |       |  |       |       |       |       |    |    |     |       |    |   |    |        |   |    |    |         |    |   |    |  |  |  |
| Edu 12                                                                                     | 0                                                                                                                                                                                                                                                                                                                                                                                                                                                                    | 40      | 40      |         |       |  |       |       |       |       |    |    |     |       |    |   |    |        |   |    |    |         |    |   |    |  |  |  |
| Edu 14A                                                                                    | 70                                                                                                                                                                                                                                                                                                                                                                                                                                                                   | 0       | 70      |         |       |  |       |       |       |       |    |    |     |       |    |   |    |        |   |    |    |         |    |   |    |  |  |  |

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

|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | TOTAL | 150 | 70 | 220 |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------|-----|----|-----|
| <b>Edu 4. Primary phase Alternative Provision Commissioning costs – Management action</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |       |     |    |     |
| <p>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.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |       |     |    |     |
| <b>Edu 5. Contribution from the Participation Team – Management action</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |       |     |    |     |
| <p>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.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |       |     |    |     |
| <b>Edu 12. Lewisham Challenge – Management action</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |       |     |    |     |
| <p>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).</p> <p>The programme is long standing in Lewisham and is coordinated by an external consultant.</p> <p>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.</p> |       |     |    |     |
| <b>Edu 14a. Outreach Inclusion Service – Management action</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |       |     |    |     |
| <p>There are three elements to this overall savings proposal of £70k.</p> <ol style="list-style-type: none"><li>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.</li><li>b. Finance support has previously brokered with the New Woodlands School at an annual cost of £6K. This ceased from 31<sup>st</sup></li></ol>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |       |     |    |     |

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

|                                                                                           |                                                                                                                                                                                                                                                         |              |                        |             |
|-------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------|------------------------|-------------|
|                                                                                           | <p>July 2023. The Outreach Manager and internal Business Support are managing the finances and will continue to do so moving forward.</p> <p>With changes to the management of the offer a vacant post is now being deleted from the establishment.</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>                                                                                                                                                                                                                                         | £8,563       | <b>Net £k</b>          | £197        |
| <b>Cut proposed</b>                                                                       | <b>2023/24 £k</b>                                                                                                                                                                                                                                       | <b>£150k</b> | <b>2024/25 £k</b>      | <b>£70k</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><br>(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>                                                                      |                                                                                                                                                                                                                                                         |              |                        |             |

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

|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p><b>Primary phase Alternative Provision Commissioning costs – Management Action</b></p> <p>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.</p> <p><b>Contribution from the Participation Team</b></p> <p>N/A as it is external / additional funding we can contribute. However this is a one-off saving contribution.</p> <p><b>Lewisham Challenge</b></p> <p>If we are unable to maintain external funding from key stakeholders we would need to consider the future of the programme.</p> <p><b>Outreach Inclusion Service</b></p> <p>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.</p> |
| <p><b>Staff</b></p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| <p><b>Primary phase Alternative Provision Commissioning costs – Management Action</b></p> <p>N/A no impact on staffing.</p> <p><b>Contribution from the Participation Team</b></p> <p>N/A no impact on staffing.</p> <p><b>Lewisham Challenge</b></p> <p>N/A no impact on staffing.</p> <p><b>4. Outreach Inclusion Service</b></p> <p>N/A no impact on staffing</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| <p><b>Other Council Services</b></p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| <p><b>Primary phase Alternative Provision Commissioning costs – Management Action</b></p> <p>N/A no impact on other Council services.</p> <p><b>Contribution from the Participation Team</b></p> <p>N/A no impact on other Council services.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |

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

### Lewisham Challenge

N/A no impact on other Council services.

### Outreach Inclusion Service

No impact on other Council services

### Partners

#### Primary phase Alternative Provision Commissioning costs – Management Action

N/A

#### Contribution from the Participation Team

N/A

### Lewisham Challenge

N/A

### Outreach Inclusion Service

New Woodlands School were notified of these changes in Spring 2023, which were implemented in Summer 2023.

#### Are there any specific equalities implications?

| 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 |   |

DRAFT

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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<br>CYP17 – Integrated SEND Service Grant Maximisation                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |          |               |      |
| <b>Cut title</b>                                                                           | Edu 8 Savings DBV Programme Implementation Grant<br>Edu14 SEN Transport Mitigation work                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |          |               |      |
| <b>Description of cut</b><br>(including any specific elements or phasing to be considered) | Integrated SEND Service (£100k) – Grant Maximisation (one off)<br><br>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>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |          |               | 250k |
| <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 | <b>Number of staff</b> |
| <b>Public consultation</b>                                                                | Y/N                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               | N | <b>Audience(s)</b>     |
| <b>Investment required</b><br>(value of cut 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>                       | 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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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<br>CYP19 – Early Years Block Grant Maximisation<br>CYP20 – Lewisham Virtual School Efficiencies<br>(Edu 11- DUPLICATE)                                                                                                                                                                                      |                |                |                |              |
| <b>Cut title</b>                                                                               | Edu6 - Use of grant funding to provide administrative support within Lewisham Learning.<br><br>Edu7 – Early Years Funding Block -Grant Maximisation<br><br>Edu10- Efficiency savings across Lewisham Virtual School<br><br>Edu11 - Overspend reduction measure – Time off for trade union activities (TOFTUA) and Disclosure and Barring Service (DBS) charges |                |                |                |              |
| <b>Description of cut</b><br><br>(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>   | <b>£'000</b> |
|                                                                                                | Edu 6                                                                                                                                                                                                                                                                                                                                                          | 15             | 0              | 0              | 15           |
|                                                                                                | Edu 7                                                                                                                                                                                                                                                                                                                                                          | 0              | 35             | 100            | 135          |
|                                                                                                | Edu 10                                                                                                                                                                                                                                                                                                                                                         | 61             | 0              | 0              | 61           |
|                                                                                                | Edu 11                                                                                                                                                                                                                                                                                                                                                         | 15             | 0              | 0              | 15           |
|                                                                                                | <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>                                                                                                                                                                                                                                                                |                |                |                |              |

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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 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  |

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

|                                             |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |             |                   |              |
|---------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------|-------------------|--------------|
|                                             | <p><b>Edu 11 - Overspend reduction measure, TOFTUA and DBS) Saving relates to cost reduction £15k.</b></p> <p>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 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%<br>7 – 70%<br>10 - 95%<br>11- 100%                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |             |                   |              |
| <b>Impact of making the cut</b>             | 6 - No impact given the additional grant funding<br><br>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<br><br>10 – The Virtual School service is demand led and a statutory requirement on LA's                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |             |                   |              |

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

|                                                                                                                        |                                                                                                                                                                                                                                        |   |                        |
|------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---|------------------------|
|                                                                                                                        | 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 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>                                                                                                    | 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 cut shown above should be net of this investment)                                 | Y/N                                                                                                                                                                                                                                    | N | <b>Cost £k</b> N       |
|                                                                                                                        | <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. |                                                                                                                                                                                                                                        |   |                        |

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

### **Early Years Funding Block -Grant Maximisation**

There will be no impact on service users.

### **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**

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

None envisaged

**Overspend reduction measure – TOFTUA and DBS charges**

None

**Partners**

**Use of grant funding to provide administrative support within Lewisham Learning.**

There is no anticipated impact on partners.

**Early Years Funding Block -Grant Maximisation**

There is no impact on partners.

**Efficiency savings across Lewisham Virtual School**

None envisaged

**Overspend reduction measure – TOFTUA and DBS charges**

Arrangements for school funding of the activity has been agreed by schools forum

**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       |

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|                           |  |  |    |   |
|---------------------------|--|--|----|---|
| 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>                                                                         | CYPS – Education                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| <b>Director</b>                                                                            | Angela Scattergood (Pinaki Ghoshal – Executive Director)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| <b>Service area</b>                                                                        | Education                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| <b>Cabinet Portfolio</b>                                                                   | Children & Young People- Cllr Barnham                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| <b>Reference</b>                                                                           |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| <b>Cut title</b>                                                                           | 1. <u>Overspend reduction measure – TOFTUA and DBS charges</u>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| <b>Description of cut</b><br>(including any specific elements or phasing to be considered) | <p>Saving relates to cost reduction £15k</p> <p>Lewisham Council strongly supports the principle of collective bargaining and recognises the role that local trade unions can play in maintaining good employee relations, assisting communication between the authority and its workforce, as well as representing individual employees.</p> <p>Schools Forum has supported the process of ‘de-delegation’ for a number of years now in relation to Lewisham maintained schools. The Forum has recognised the value of having a consistent group of experienced trade union representatives to work with on a borough wide basis. The budget in question relates mainly to the teacher trade unions. However, the inception of the National Education Union (NEU) means that this large union welcomes members from all school based staff. Facilities time for the main recognised support staff unions (UNISON, GMB, UNITE) is funded by the corporate Council.</p> <p>Previously the TOFTUA support was allocated on the basis of an historic formula.</p> <p>The unions elect their representatives democratically. This can present a challenge for schools when they find a member of their staff has been elected and may be required to have time off for a regular day/days per week. In addition the current reimbursement arrangements within the policy do not cover the full cost of absent members of staff.</p> <p>The consequences, although unintended are that specific schools and the Local Authority were subsidising TOFTUA arrangements.</p> <p>At its meeting on the 19<sup>th</sup> October 2023, Schools forum supported the full reimbursement model for trade union cover as part of its de-delegation arrangements.</p> |

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

|                                                                                    |                                                                                                                                                                                                                                                                                      |      |                 |   |
|------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------|-----------------|---|
|                                                                                    | <p>This means, that the previous shortfall in funding is no longer the case. Relative to 2022/23, the Education service will no longer subsidise this cost.</p> <p>The service also provides a DBS service. future costs will include the reimbursement of Administrative costs.</p> |      |                 |   |
| Division budget                                                                    | Gross £k                                                                                                                                                                                                                                                                             |      | Net £k          |   |
| Service area budget                                                                | Gross £k                                                                                                                                                                                                                                                                             |      | Net £k          |   |
| Savings proposed                                                                   | 2023/24 £k                                                                                                                                                                                                                                                                           | 15   | 2024/25 £k      |   |
|                                                                                    |                                                                                                                                                                                                                                                                                      |      | 2025/26 £k      |   |
| <b>Risks:</b>                                                                      |                                                                                                                                                                                                                                                                                      |      |                 |   |
| Cost shunt to other service? Y/N                                                   |                                                                                                                                                                                                                                                                                      | No   |                 |   |
| Likelihood of making cut in full - %                                               |                                                                                                                                                                                                                                                                                      | 100% |                 |   |
| Impact of making the cut                                                           |                                                                                                                                                                                                                                                                                      |      |                 |   |
| Possible risk mitigation                                                           |                                                                                                                                                                                                                                                                                      |      |                 |   |
| <b>Other considerations:</b>                                                       |                                                                                                                                                                                                                                                                                      |      |                 |   |
| Member or Officer decision                                                         |                                                                                                                                                                                                                                                                                      |      |                 |   |
| Redundancies                                                                       | Y/N                                                                                                                                                                                                                                                                                  | N    | Number of staff |   |
| Public consultation                                                                | Y/N                                                                                                                                                                                                                                                                                  | N    | Audience(s)     |   |
| Investment required<br>(value of cut shown above should be net of this investment) | Y/N                                                                                                                                                                                                                                                                                  | Y    | Cost £k         | N |
|                                                                                    | In what:                                                                                                                                                                                                                                                                             |      |                 |   |

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

|                                                                     |  |
|---------------------------------------------------------------------|--|
| <b>Contingent on other actions / decisions / cross service work</b> |  |
| <b>Specific legal or statutory considerations</b>                   |  |

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|                                                                                            |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |          |                   |              |
|--------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------|-------------------|--------------|
| <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><br>(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>£150k</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><br>(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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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.

### Staff

No impact on staff.

### Other Council Services

No impact

### Partners

ICB- negotiations at senior level to agree way forward

### Are there any specific equalities implications?

| 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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|  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
|--|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|  | Children & Young People                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
|  | Sara Rahman                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
|  | Families, Quality & Commissioning                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
|  | Cllr Barnham                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
|  | CYP11 - FQC Reduction in Business Support<br>CYP12 – FQC Grant Maximisation<br>CYP13 – FQC Sale of Capital Asset<br>CYP14 – FQC Children’s Centre Revenue<br>CYP15 – FQC Staffing Costs Reduction                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
|  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
|  | <p>1. <u>Reduction in Business Support to FQC.</u><br/>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><br/>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><br/>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><br/>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><br/>                     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> |            |             |            |              |
|                                             | Saving                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                | 2023/24    | 2024/25     | 2025/26    | Total        |
|                                             | FQC 1                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 | 0          | 100         | 0          | £100         |
|                                             | FQC 2                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 | 150        | 0           | 0          | £150         |
|                                             | FQC 3*                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                | 0          | 850         | 0          | £850         |
|                                             | FQC 4                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 | 0          | 50          | 0          | £50          |
|                                             | FQC 5*                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                | 350        | 0           | 0          | £350         |
|                                             | <b>TOTAL</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          | <b>500</b> | <b>1000</b> | <b>0</b>   | <b>£1500</b> |
|                                             | <b>*Denotes one off savings</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |            |             |            |              |
|                                             | Gross £k                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | 15,141     |             | Net £k     | 8,328        |
|                                             | Gross £k                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | 15,141     |             | Net £k     | 8,328        |
|                                             | 2023/24 £k                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            | £500k      |             | 2024/25 £k | £1m          |
|                                             |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |            |             | 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%        |             |            |              |
|                                             | <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>                                                                                                             |            |             |            |              |

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|                              |                                                        |                                                                                                                        |                 |
|------------------------------|--------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------|-----------------|
|                              | See above                                              |                                                                                                                        |                 |
| <b>Other considerations:</b> |                                                        |                                                                                                                        |                 |
|                              | 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       |
|                              | <b>In what:</b>                                        | 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.

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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.

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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.

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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|                                                                                               |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |                |                        |                |
|-----------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------|------------------------|----------------|
| <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><br>(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><br>(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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|                                                                     |                |  |
|---------------------------------------------------------------------|----------------|--|
| 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> |
| <b>Age</b>                                                                                                                                                                  |                                   |                                     |                                  | X              |
| <b>Disability</b>                                                                                                                                                           |                                   |                                     |                                  | X              |
| <b>Ethnicity</b>                                                                                                                                                            |                                   |                                     |                                  | X              |
| <b>Gender</b>                                                                                                                                                               |                                   |                                     |                                  | 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><br>(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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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

|                                                                                              |                                                                                                                                                                             |                |                    |                |
|----------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------|--------------------|----------------|
| <b>Public consultation</b>                                                                   | <b>Y/N</b>                                                                                                                                                                  | N              | <b>Audience(s)</b> | Not Applicable |
| <b>Investment required</b><br>(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. |                |                    |                |

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

#### Service Users

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.

#### Staff

This proposal is not expected to impact directly on staff.

#### Other Council Services

There is no impact to other Council services.

#### Partners

There is no impact to our partner organisations.

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

| 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)

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|----------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------|------------|------------|
| Directorate                                                                            | Housing Services                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |            |            |            |
| Director                                                                               | Fen Beckman                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |            |            |            |
| Service area                                                                           | Housing Needs and Refugee Services                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |            |            |            |
| Cabinet Portfolio                                                                      | Housing Management and Homelessness- Cllr Cooper                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |            |            |            |
| Reference                                                                              | HSG04 – Reduction of Property Negotiator Posts                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |            |            |            |
|                                                                                        |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |            |            |            |
| Saving title                                                                           | Reduction of two Property Negotiator posts                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |            |            |            |
| Description of saving<br>(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> <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> |            |            |            |
| Division budget                                                                        | Gross £                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          | 54,015,896 | Net £      | 8,383,337M |
| Service area budget                                                                    | Gross £                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          | 51,577,572 | Net £      | 9,276,448  |
| Saving proposed                                                                        | 2023/24 £k                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | 0          | 2024/25 £k | 113        |
| <b>Risks:</b>                                                                          |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |            |            |            |
| Cost shunt to other service? Y/N                                                       | No                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |            |            |            |

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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 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                                                           | 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. |                |                 |
| Other considerations:                                                              |                                                                                                                                                                                                                                                                                                                                      |                |                 |
| Member or Officer decision                                                         | Officer                                                                                                                                                                                                                                                                                                                              |                |                 |
| Redundancies                                                                       | Y/N                                                                                                                                                                                                                                                                                                                                  | Yes (Possibly) | Number of staff |
|                                                                                    |                                                                                                                                                                                                                                                                                                                                      |                | 2               |
| 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         |
|                                                                                    | In what:                                                                                                                                                                                                                                                                                                                             | Not Applicable |                 |
| Contingent on other actions / decisions / cross service work                       | Not Applicable                                                                                                                                                                                                                                                                                                                       |                |                 |
| Specific legal or statutory considerations                                         | 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.                                                                                                                                                          |                |                 |

|                                                                                                                                                                                                                                                                                                                                                                                     |                                   |                                     |                                  |                |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------|-------------------------------------|----------------------------------|----------------|
| <b>What is the likely impact of the proposed changes?</b>                                                                                                                                                                                                                                                                                                                           |                                   |                                     |                                  |                |
| <b>Service Users</b>                                                                                                                                                                                                                                                                                                                                                                |                                   |                                     |                                  |                |
| 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. |                                   |                                     |                                  |                |
| <b>Staff</b>                                                                                                                                                                                                                                                                                                                                                                        |                                   |                                     |                                  |                |
| 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.                                                                                                        |                                   |                                     |                                  |                |
| <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              |

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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?         |  |  | N |   |

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

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|-----------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------|-------------------|-------------|
| <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><br>(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>   |
| <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>                                                               | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |            |                   |             |
| <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>                                                                       | Y/N             | Not Applicable to LBL | <b>Number of staff</b> | Not Applicable |
| <b>Public consultation</b>                                                                | Y/N             | No                    | <b>Audience(s)</b>     | Not Applicable |
| <b>Investment required</b> (value of saving shown above should be net of this investment) | Y/N             | 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>                                         | Not Applicable  |                       |                        |                |

| <b>Impact &amp; Outcomes</b>                                                                                                                                                                                                                                                                                                                                                                                          |                                   |                                     |                                  |                |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------|-------------------------------------|----------------------------------|----------------|
| <b>What is the likely impact of the proposed changes?</b>                                                                                                                                                                                                                                                                                                                                                             |                                   |                                     |                                  |                |
| <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.                                                                                                                                                                                                                         |                                   |                                     |                                  |                |
| <b>Other Council Services</b>                                                                                                                                                                                                                                                                                                                                                                                         |                                   |                                     |                                  |                |
| 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. |                                   |                                     |                                  |                |
| <b>Partners</b>                                                                                                                                                                                                                                                                                                                                                                                                       |                                   |                                     |                                  |                |
| There is no impact to our partner organisations                                                                                                                                                                                                                                                                                                                                                                       |                                   |                                     |                                  |                |
| <b>Are there any specific equalities implications?</b> <u>Please provide a response for each protected characteristic/equalities consideration, even if the impact is neutral.</u>                                                                                                                                                                                                                                    |                                   |                                     |                                  |                |
| <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              |
| <b>Gender reassignment</b>                                                                                                                                                                                                                                                                                                                                                                                            |                                   |                                     |                                  | x              |

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

|                                 |  |  |   |   |
|---------------------------------|--|--|---|---|
| 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><br>(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> <p>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</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> |
|                                                                                               | 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)

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.

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

|                                                                                                                                                                                                                                                                                       |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |              |                   |             |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------|-------------------|-------------|
|                                                                                                                                                                                                                                                                                       | <b>Projected Savings</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |              |                   |             |
|                                                                                                                                                                                                                                                                                       | 2024/25                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | £100k        |                   |             |
|                                                                                                                                                                                                                                                                                       | 2025/26                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | £105k        |                   |             |
|                                                                                                                                                                                                                                                                                       | <b>Total</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 | <b>£205k</b> |                   |             |
| <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> |              |                   |             |

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

|                                                                                           |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |   |                        |        |
|-------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---|------------------------|--------|
|                                                                                           | <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> |   |                        |        |
| <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</b> (value of saving shown above should be net of this investment) | 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                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |   |                        |        |

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

|                                                                                                                                                                                                                                                                                                                                                                                                                              |                                                     |                                                                |                                                             |                                                                                                                           |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------|----------------------------------------------------------------|-------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------|
| <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> |                                                     |                                                                |                                                             |                                                                                                                           |
| <p><b>2. The protected characteristics or other equalities factors potentially impacted by this decision</b></p>                                                                                                                                                                                                                                                                                                             |                                                     |                                                                |                                                             |                                                                                                                           |
| <input type="checkbox"/> Age                                                                                                                                                                                                                                                                                                                                                                                                 | <input type="checkbox"/> Ethnicity/<br>Race         | <input type="checkbox"/> Religion or<br>belief                 | <input type="checkbox"/> Language<br>spoken                 | <input checked="" type="checkbox"/> Other, please<br>define:<br><br>Client unease with<br>formality/ authority<br>figures |
| <input type="checkbox"/> Gender/Sex                                                                                                                                                                                                                                                                                                                                                                                          | <input type="checkbox"/> Gender<br>identity         | <input checked="" type="checkbox"/> Disability                 | <input type="checkbox"/> Household<br>type                  |                                                                                                                           |
| <input type="checkbox"/> Income                                                                                                                                                                                                                                                                                                                                                                                              | <input type="checkbox"/> Carer status               | <input type="checkbox"/> Sexual<br>orientation                 | <input type="checkbox"/> Socio<br>Economic status           |                                                                                                                           |
| <input type="checkbox"/> Marriage and<br>Civil Partnership                                                                                                                                                                                                                                                                                                                                                                   | <input type="checkbox"/> Pregnancy<br>and Maternity | <input type="checkbox"/> Refugee/<br>Migrant/ Asylum<br>seeker | <input checked="" type="checkbox"/> Health &<br>Social Care |                                                                                                                           |
| <input type="checkbox"/> Nationality                                                                                                                                                                                                                                                                                                                                                                                         | <input type="checkbox"/> Employment                 | <input type="checkbox"/> Armed forces                          |                                                             |                                                                                                                           |

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

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.

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.

### 3. The evidence to support the analysis

Approximately 83 staff have Holbeach office as their designated workplace:

Crime, Enforcement and Regulation – c.35 staff

Youth Offending Service/Child & Adolescent Mental Health Services c.39 staff

Environmental Health c.9 staff

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.

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

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.

### 5. Impact summary

| Characteristic      | High<br>(+ve or -ve) | Medium<br>(+ve or -ve) | Low<br>(+ve or -ve) | Neutral | Summary                                                                                                     |
|---------------------|----------------------|------------------------|---------------------|---------|-------------------------------------------------------------------------------------------------------------|
| Age                 |                      |                        |                     | x       |                                                                                                             |
| Disability          | x<br>+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<br>+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.                                          |

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

|                                        |  |          |  |   |                                                                                                                          |
|----------------------------------------|--|----------|--|---|--------------------------------------------------------------------------------------------------------------------------|
| <b>Marriage and civil partnerships</b> |  |          |  | x | Marriage and civil partnerships is not expected to be impacted by the project.                                           |
| <b>Pregnancy and Maternity</b>         |  |          |  | x | is not expected to be impacted by the project.                                                                           |
| <b>Religion and belief</b>             |  | x<br>+ve |  |   | Staff will have access to the reflection rooms in Laurence House for religious observance.                               |
| <b>Sexual Orientation</b>              |  |          |  | x | Sexual orientation is not expected to be impacted by the project.                                                        |
| <b>Socioeconomic inequality</b>        |  |          |  | x | Socioeconomic inequality is not expected to be impacted by the project.                                                  |
| <b>Other factors</b>                   |  | x<br>-ve |  |   | Clients uneasy with formality/ and authority figures (uniformed security) associated with Laurence House main reception. |

### 6. Mitigation

#### Disability

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.

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**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**

DRAFT

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

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|-----------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <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><br>(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</p> |

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

|                                             |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |            |                   |            |
|---------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------|-------------------|------------|
|                                             | <p>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> <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 <u>not</u> 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>          | 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 that first-thought, and the Council also has S106 employment and skills pots which must be spent in the next 12 months.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |            |                   |            |

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

|                                                                                           |                                                                                                                                                                                                                                                             |     |                        |     |
|-------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----|------------------------|-----|
|                                                                                           | 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.             |     |                        |     |
| <b>Possible risk mitigation</b>                                                           | N/A – utilising S106 offsets any potential risk to planned Jobs and Skills activity.                                                                                                                                                                        |     |                        |     |
| <b>Other considerations:</b>                                                              |                                                                                                                                                                                                                                                             |     |                        |     |
| <b>Member or Officer decision</b>                                                         | Officers 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</b> (value of saving shown above should be net of this investment) | Y/N                                                                                                                                                                                                                                                         | 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

### Impact & Outcomes

What is the likely impact of the proposed changes?

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

| <b>Service Users</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |                                   |                                     |                                  |                |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------|-------------------------------------|----------------------------------|----------------|
| 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.                                                                                                                                                                                                                                                                                                                                          |                                   |                                     |                                  |                |
| <b>Staff</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |                                   |                                     |                                  |                |
| 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. |                                   |                                     |                                  |                |
| <b>Other Council Services</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |                                   |                                     |                                  |                |
| 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.                                                                                                                                                                                                                                                                                                                             |                                   |                                     |                                  |                |
| <b>Partners</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |                                   |                                     |                                  |                |
| There are no impacts to external partners arising from this decision.                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |                                   |                                     |                                  |                |
| <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              |
| <b>Gender reassignment</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |                                   |                                     |                                  | X              |
| <b>Marriage and civil partnerships</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |                                   |                                     |                                  | 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?   |  |  |  | N |

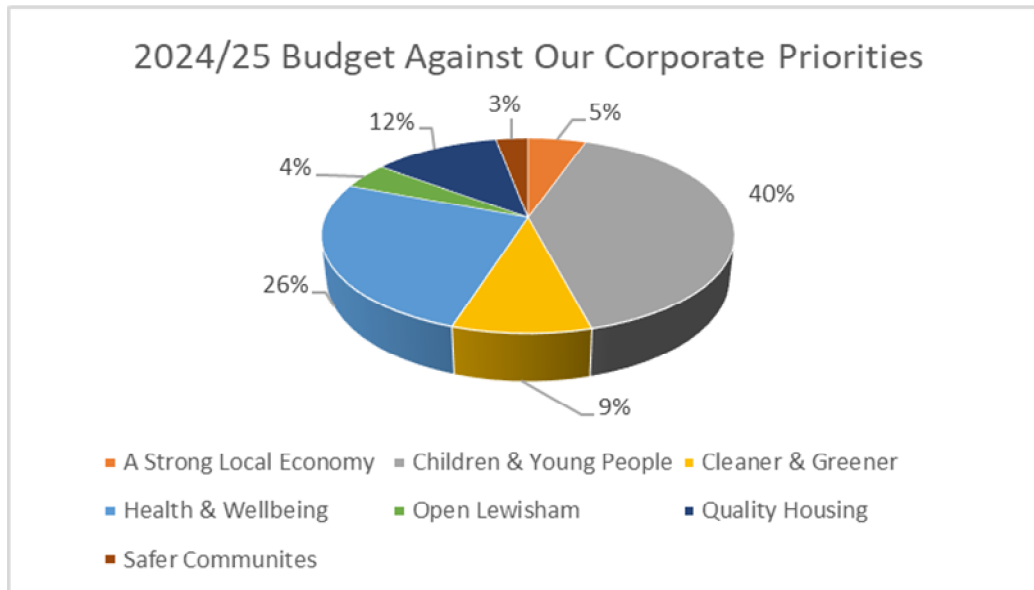
DRAFT

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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.

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APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

**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%</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**

*To follow.*

DRAFT

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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> |

| Levy bodies for Lewisham | 2023/24<br>£     | 2024/25<br>£     | Variance<br>£ |
|--------------------------|------------------|------------------|---------------|
| 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) £1,554,302,167 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.

*F2(da) TBC 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)**
  - g) £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.
  - h) £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.
  - i) £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
  - j) £nil being the amount of the financial reserves which the authority estimates it will use in order to provide for the items mentioned in subsection (2)(a), (b), (e) and (f) above.

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

*F3(aa) TBC 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

- k) £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.
- l) **£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):<br>£ |
|----------|-------------------------|
| 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:<br>£ |
|----------|-------------------|
| 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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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

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):<br/>£</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<br>£'000 | Once off<br>£'000 | Total<br>£'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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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

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 6.4
  - Interpetuity Rights (Library Service and IT Services) section 5.6
  - Photography Permit Full Day (Library and IT Services) section 5.6
  - Planning section 5.15
  - Flytip – 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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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

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

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

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

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 Inperpetuity rights. The introduction of the photography permit allows Archive and Local History Service researchers and scholars to photograph archival material. Whilst the Inperpetuity 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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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

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

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

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

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

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

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

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

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

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

### 11. Further Implications

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

### 12. Report Author and Contact

12.1. Katharine Nidd, Acting Director of Finance 020 8314 6651,  
[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.

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

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

### 4. Lewisham's Principles for Charging

#### 4.1 Corporate Priorities and Service Objectives

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

#### 4.2 When will Lewisham Charge?

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

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

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

### 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. |
| 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.

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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.

### 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?

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

- 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

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

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### 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

GREEN SCENE

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

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

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

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

|                                                                                   |            |                      |            |                        |                               |            |                    |                 |                           |
|-----------------------------------------------------------------------------------|------------|----------------------|------------|------------------------|-------------------------------|------------|--------------------|-----------------|---------------------------|
| 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      |

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

|                                                                                                                                           |      |                      |            |                        |                               |            |                        |                 |                           |
|-------------------------------------------------------------------------------------------------------------------------------------------|------|----------------------|------------|------------------------|-------------------------------|------------|------------------------|-----------------|---------------------------|
| RENEWAL=100% of application fee                                                                                                           |      |                      |            |                        |                               |            |                        |                 | Discretionary             |
| 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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|                                                                        |      |                      |            |                        |                               |            |                        |                 |                           |
|------------------------------------------------------------------------|------|----------------------|------------|------------------------|-------------------------------|------------|------------------------|-----------------|---------------------------|
| <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;     |

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

|                                                                   |      |                        |     |             |                        |     |             |          |                    |
|-------------------------------------------------------------------|------|------------------------|-----|-------------|------------------------|-----|-------------|----------|--------------------|
| 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;     |
| 5.3 Adult Swim                                                    |      | 4.5                    | 0   | 4.5         | 4.5                    | 0   | 5           | 11.1     | Discretionary;     |
| <b>1Life Downham Health and Leisure Centres</b>                   |      |                        |     |             |                        |     |             |          |                    |
|                                                                   |      | Proposed charges 23/24 |     |             | Proposed charges 24/25 |     |             |          |                    |
|                                                                   | UNIT | Basic                  | VAT | Total 23/24 | Basic                  | VAT | Total 24/25 | % change | Basis for charging |
| 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;     |

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

|                                                         |      |                               |            |                    |                               |            |                    |                 |                           |
|---------------------------------------------------------|------|-------------------------------|------------|--------------------|-------------------------------|------------|--------------------|-----------------|---------------------------|
| 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;            |
| <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             |

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

|                                                  |      |                        |     |             |                        |     |             |          |                    |
|--------------------------------------------------|------|------------------------|-----|-------------|------------------------|-----|-------------|----------|--------------------|
| 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      |
| 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>1 Life Downham Health and Leisure Centres</b> |      |                        |     |             |                        |     |             |          |                    |
|                                                  |      | Proposed charges 23/24 |     |             | Proposed charges 24/25 |     |             |          |                    |
|                                                  | 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      |

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

|                                               |  |     |   |     |     |   |     |     |               |
|-----------------------------------------------|--|-----|---|-----|-----|---|-----|-----|---------------|
| 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 |
| 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        |                    |

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|                                                                     |      |                      |            |                            |                               |            |                    |                 |                           |
|---------------------------------------------------------------------|------|----------------------|------------|----------------------------|-------------------------------|------------|--------------------|-----------------|---------------------------|
| 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               |                           |
| 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             |                           |

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|                                                                    |      |                      |            |                            |                               |            |                    |                 |                           |
|--------------------------------------------------------------------|------|----------------------|------------|----------------------------|-------------------------------|------------|--------------------|-----------------|---------------------------|
| 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             |                           |
| 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>                                         | 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> |
| 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               |                           |

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|                                                     |      |                      |            |                            |                               |            |                    |                 |                           |
|-----------------------------------------------------|------|----------------------|------------|----------------------------|-------------------------------|------------|--------------------|-----------------|---------------------------|
| 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               |                           |
| 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 | <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> |
| 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             |                           |

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

|                                                   |      |                      |     |                     |                               |        |             |          |                    |
|---------------------------------------------------|------|----------------------|-----|---------------------|-------------------------------|--------|-------------|----------|--------------------|
| 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        |                    |
| 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        |                    |

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

|                                                            |             |                      |            |                            |                               |            |                    |                 |                           |
|------------------------------------------------------------|-------------|----------------------|------------|----------------------------|-------------------------------|------------|--------------------|-----------------|---------------------------|
| 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             |                           |
| 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>                                 | <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> |
| 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      |

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

|                                                                          |         |       |      |       |       |      |       |      |               |
|--------------------------------------------------------------------------|---------|-------|------|-------|-------|------|-------|------|---------------|
| 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 |

### 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      |

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|                   |  |       |      |       |       |      |       |    |               |
|-------------------|--|-------|------|-------|-------|------|-------|----|---------------|
| 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          |

### SERVICE: BUILDING CONTROL

| Building Control                                   | UNIT | Proposed charges 23/24 |       |                 | Proposed charges 24/25 |       |                 | % Change | Basis for charging                             |
|----------------------------------------------------|------|------------------------|-------|-----------------|------------------------|-------|-----------------|----------|------------------------------------------------|
|                                                    |      | Basic (£)              | VAT   | Total 23/24 (£) | Basic (£)              | VAT   | Total 24/25 (£) |          |                                                |
| Domestic Extensions - not more than 2 storeys high |      |                        |       |                 |                        |       |                 |          | 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 |

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|                                                     |      |                               |            |                        |                               |            |                        |                 |                                                |
|-----------------------------------------------------|------|-------------------------------|------------|------------------------|-------------------------------|------------|------------------------|-----------------|------------------------------------------------|
| 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>       |      |                               |            |                        |                               |            |                        |                 |                                                |
| 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>       |      |                               |            |                        |                               |            |                        |                 |                                                |
| 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>   |      |                               |            |                        |                               |            |                        |                 |                                                |
| 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 |
| 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>                     |      |                               |            |                        |                               |            |                        |                 |                                                |
| 0-1,000                                             |      | 195.00                        | 39.00      | 234.00                 | 210.02                        | 42.00      | 252.00                 | 7.7             | Discretionary - Figures rounded for simplicity |

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|                         |      |                               |            |                        |                               |            |                        |                 |                                                |
|-------------------------|------|-------------------------------|------------|------------------------|-------------------------------|------------|------------------------|-----------------|------------------------------------------------|
| 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 |
| 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 |

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|                         |      |                               |            |                        |                               |            |                        |                 |                                                |
|-------------------------|------|-------------------------------|------------|------------------------|-------------------------------|------------|------------------------|-----------------|------------------------------------------------|
| 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 |
| 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 |

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

|               |  |        |        |        |        |        |         |     |                                                |
|---------------|--|--------|--------|--------|--------|--------|---------|-----|------------------------------------------------|
| 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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**SERVICE: PLANNING**

|  |  |                      |                               |  |  |
|--|--|----------------------|-------------------------------|--|--|
|  |  | <b>Charges 23/24</b> | <b>Proposed charges 24/25</b> |  |  |
|--|--|----------------------|-------------------------------|--|--|

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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            |
|--------------------------------------------------------------------------------------------------------|-----------------------------------|-------------------------------------------------------------------------------------------------------------------------|------|-------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------|------|-----------------------------------------------------------------------------------------------------------------------|----------|-------------------------------|
|                                                                                                        |                                   |                                                                                                                         | 20%  |                                                                                                                         |                                                                                                                       | 20%  |                                                                                                                       |          |                               |
| <b>Operations:</b>                                                                                     |                                   |                                                                                                                         |      |                                                                                                                         |                                                                                                                       |      |                                                                                                                       |          |                               |
| <b>1. New Developments</b>                                                                             |                                   |                                                                                                                         |      |                                                                                                                         |                                                                                                                       |      |                                                                                                                       |          |                               |
| <b>1.1 Outline Applications (calculated on site area)</b>                                              |                                   |                                                                                                                         |      |                                                                                                                         |                                                                                                                       |      |                                                                                                                       |          |                               |
|                                                                                                        | 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                 |
| 1.1.1 Not more than 0.5 hectare                                                                        |                                   |                                                                                                                         |      |                                                                                                                         |                                                                                                                       |      |                                                                                                                       |          |                               |
| 1.1.2 Between 0.5 hectars 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<br>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<br>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> |                                   |                                                                                                                         |      |                                                                                                                         |                                                                                                                       |      |                                                                                                                       |          |                               |
|                                                                                                        |                                   |                                                                                                                         |      | <b>Charges 23/24</b>                                                                                                    |                                                                                                                       |      |                                                                                                                       |          | <b>Proposed charges 24/25</b> |

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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 |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------|---------------------------------------------------------------------------------------------------|------|---------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------|------|------------------------------------------------------------------------------------------|----------|--------------------|
| 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      |
|                                                                                                                                                                                  |                    |                                                                                                   |      | <b>Charges 23/24</b>                                                                              | <b>Proposed charges 24/25</b>                                                            |      |                                                                                          |          |                    |

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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            |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------|---------------------------------------------------------------------------------------------------------------------|------|---------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------|------|------------------------------------------------------------------------------------------------------------------|----------|-------------------------------|
| 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                 |
|                                                                                                                                                                                                                                                                |                           |                                                                                                                     |      | <b>Charges 23/24</b>                                                                                                |                                                                                                                  |      |                                                                                                                  |          | <b>Proposed charges 24/25</b> |

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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 |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------|---------------------------------------------------------------------------------------------------------------------|------|---------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------|------|------------------------------------------------------------------------------------------------------------------|----------|--------------------|
| 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      |
|                                                                                                                                                                                                                                                                                   |                           | <b>Charges 23/24</b>                                                                                                |      |                                                                                                                     | <b>Proposed charges 24/25</b>                                                                                    |      |                                                                                                                  |          |                    |
| Planning                                                                                                                                                                                                                                                                          | UNIT                      | Basic (£)                                                                                                           | VAT  | Total 23/24 (£)                                                                                                     | Basic (£)                                                                                                        | VAT  | Total 24/25 (£)                                                                                                  | % change | Basis for charging |

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

|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |                                   |                                                                                                                         |      |                                                                                                                         |                                                                                                                      |      |                                                                                                                      |          |                    |                      |  |  |  |  |                               |  |  |  |  |                 |      |           |     |                 |           |     |                 |          |                    |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------|-------------------------------------------------------------------------------------------------------------------------|------|-------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------|------|----------------------------------------------------------------------------------------------------------------------|----------|--------------------|----------------------|--|--|--|--|-------------------------------|--|--|--|--|-----------------|------|-----------|-----|-----------------|-----------|-----|-----------------|----------|--------------------|
| 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>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |                                   |                                                                                                                         |      |                                                                                                                         |                                                                                                                      |      |                                                                                                                      |          |                    |                      |  |  |  |  |                               |  |  |  |  |                 |      |           |     |                 |           |     |                 |          |                    |
| <table border="0" style="width: 100%;"> <tr> <td colspan="5" style="text-align: center;"><b>Charges 23/24</b></td> <td colspan="5" style="text-align: center;"><b>Proposed charges 24/25</b></td> </tr> <tr> <td style="text-align: center;"><b>Planning</b></td> <td style="text-align: center;">UNIT</td> <td style="text-align: center;">Basic (£)</td> <td style="text-align: center;">VAT</td> <td style="text-align: center;">Total 23/24 (£)</td> <td style="text-align: center;">Basic (£)</td> <td style="text-align: center;">VAT</td> <td style="text-align: center;">Total 24/25 (£)</td> <td style="text-align: center;">% change</td> <td style="text-align: center;">Basis for charging</td> </tr> </table> |                                   |                                                                                                                         |      |                                                                                                                         |                                                                                                                      |      |                                                                                                                      |          |                    | <b>Charges 23/24</b> |  |  |  |  | <b>Proposed charges 24/25</b> |  |  |  |  | <b>Planning</b> | UNIT | Basic (£) | VAT | Total 23/24 (£) | Basic (£) | VAT | Total 24/25 (£) | % change | Basis for charging |
| <b>Charges 23/24</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |                                   |                                                                                                                         |      |                                                                                                                         | <b>Proposed charges 24/25</b>                                                                                        |      |                                                                                                                      |          |                    |                      |  |  |  |  |                               |  |  |  |  |                 |      |           |     |                 |           |     |                 |          |                    |
| <b>Planning</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            | UNIT                              | Basic (£)                                                                                                               | VAT  | Total 23/24 (£)                                                                                                         | Basic (£)                                                                                                            | VAT  | Total 24/25 (£)                                                                                                      | % change | Basis for charging |                      |  |  |  |  |                               |  |  |  |  |                 |      |           |     |                 |           |     |                 |          |                    |

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

|                                                                                                                                                                                                                                                                                                                                                                                                       |      |                                                                     |            |                                                                     |                                                                     |            |                                                                     |                 |                           |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------|---------------------------------------------------------------------|------------|---------------------------------------------------------------------|---------------------------------------------------------------------|------------|---------------------------------------------------------------------|-----------------|---------------------------|
| 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             |
| <b>Charges 23/24</b> <span style="margin-left: 200px;"><b>Proposed charges 24/25</b></span>                                                                                                                                                                                                                                                                                                           |      |                                                                     |            |                                                                     |                                                                     |            |                                                                     |                 |                           |
| <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)

|                                                                                                                                                                                                                                                                                                                                                                                                       |                                   |                                             |            |                                             |                                             |            |                                             |                 |                           |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------|---------------------------------------------|------------|---------------------------------------------|---------------------------------------------|------------|---------------------------------------------|-----------------|---------------------------|
| 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             |
|                                                                                                                                                                                                                                                                                                                                                                                                       |                                   |                                             |            |                                             |                                             |            |                                             |                 |                           |
| <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> |

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

|                                                                                                                                                                                     |                                   |                                                                                                                           |            |                                                                                                                           |                                                                                                                        |            |                                                                                                                        |                 |                           |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------|---------------------------------------------------------------------------------------------------------------------------|------------|---------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------|------------|------------------------------------------------------------------------------------------------------------------------|-----------------|---------------------------|
| 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             |
| 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>                                                                                                                                                                     | 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)

|                                                                                                                                             |                                   |                                                                                                                         |      |                                                                                                                         |                                                                                                                       |      |                                                                                                                       |          |                    |
|---------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------|-------------------------------------------------------------------------------------------------------------------------|------|-------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------|------|-----------------------------------------------------------------------------------------------------------------------|----------|--------------------|
| 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      |
| 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>                                                                                                                             | UNIT                              | Basic (£)                                                                                                               | VAT  | Total 23/24 (£)                                                                                                         | Basic (£)                                                                                                             | VAT  | Total 24/25 (£)                                                                                                       | % change | Basis for charging |

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

|                                                                                                                                                                                                                                                                                                                                                             |      |                                                                                                    |            |                                                                                                    |                  |                                                                                                    |                        |                                                                                                    |                           |               |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------|----------------------------------------------------------------------------------------------------|------------|----------------------------------------------------------------------------------------------------|------------------|----------------------------------------------------------------------------------------------------|------------------------|----------------------------------------------------------------------------------------------------|---------------------------|---------------|
| 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                             | 0.00             | 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                   | 0.00                                                                                               | 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             |               |
| 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 | 0.00             | 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> |               |

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

|                                                                                                                                                                                                                                                           |      |                             |            |                             |                             |            |                             |                 |                           |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------|-----------------------------|------------|-----------------------------|-----------------------------|------------|-----------------------------|-----------------|---------------------------|
| 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             |
| 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> |

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

|                                                                                                                                                                                                                                                                                                                                  |      |                  |            |                        |                  |            |                        |                 |                           |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------|------------------|------------|------------------------|------------------|------------|------------------------|-----------------|---------------------------|
| 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             |
| 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> |

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

|                                                                                                                                                                                                                                                           |                   |                                                                                |      |                                                                                |                                                                             |       |                                                                             |       |               |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------|--------------------------------------------------------------------------------|------|--------------------------------------------------------------------------------|-----------------------------------------------------------------------------|-------|-----------------------------------------------------------------------------|-------|---------------|
| 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 |
| 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 the 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 |

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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 |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------|--------------------------------------------------------------------------------------------|-------|-----------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------|-------|----------------------------------------------------------------------------------------------|----------|--------------------|
| 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>                                                                                                      |                   |                                                                                            |       |                                                                                         |                                                                                              |       |                                                                                              |          |                    |
| 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      |

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

| <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             |
| 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>                                                                                                                                                                                                                                                            |      |                  |            |                        |                  |            |                        |                 |                           |

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

|                                                                                        |                                   |                                        |            |                                        |                                        |            |                                        |                 |                           |
|----------------------------------------------------------------------------------------|-----------------------------------|----------------------------------------|------------|----------------------------------------|----------------------------------------|------------|----------------------------------------|-----------------|---------------------------|
| 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             |
| 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             |

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

|                                                                                                                         |                |                  |            |                        |                  |            |                        |                 |                           |
|-------------------------------------------------------------------------------------------------------------------------|----------------|------------------|------------|------------------------|------------------|------------|------------------------|-----------------|---------------------------|
| 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             |
| 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             |

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|                                                                                                                                                                                                                  |             |                  |            |                        |                                  |            |                                  |                 |                           |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------|------------------|------------|------------------------|----------------------------------|------------|----------------------------------|-----------------|---------------------------|
| 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>                                                                                                                                                                                                  | <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> |
| 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             |
| 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             |

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

| <b>19. Pre-application Advice Services</b>                                                                                                                                                                                                                                           |             |           |      |                 |           |      |                 |          |                    |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------|-----------|------|-----------------|-----------|------|-----------------|----------|--------------------|
| <b>Planning</b>                                                                                                                                                                                                                                                                      | UNIT        | Basic (£) | VAT  | Total 23/24 (£) | Basic (£) | VAT  | Total 24/25 (£) | % change | Basis for charging |
| 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      |

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|                                                                                                                                                                                                                                    |             |                  |            |                        |                  |            |                        |                 |                           |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------|------------------|------------|------------------------|------------------|------------|------------------------|-----------------|---------------------------|
| 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>                                                                                                                                                                                                                    | <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> |
| 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             |

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|                                                                                                                             |             |                  |            |                        |                  |            |                        |                 |                           |
|-----------------------------------------------------------------------------------------------------------------------------|-------------|------------------|------------|------------------------|------------------|------------|------------------------|-----------------|---------------------------|
| 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             |
| <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> |
| 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             |

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

|                                                                                                                                         |                                          |                                             |            |                                             |                                                  |            |                                                  |                 |                           |
|-----------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------|---------------------------------------------|------------|---------------------------------------------|--------------------------------------------------|------------|--------------------------------------------------|-----------------|---------------------------|
| 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             |
| 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             |

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

|                                                         |             |                  |            |                        |                  |            |                        |                 |                           |
|---------------------------------------------------------|-------------|------------------|------------|------------------------|------------------|------------|------------------------|-----------------|---------------------------|
| 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/<br>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             |
| 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             |

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

|                                                                |                                        |                  |            |                        |                  |            |                        |                 |                           |
|----------------------------------------------------------------|----------------------------------------|------------------|------------|------------------------|------------------|------------|------------------------|-----------------|---------------------------|
| 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             |
| 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>                                                | 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> |
| 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             |

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

|                                                                                           |                                        |                            |            |                            |                            |            |                            |                 |                                                 |
|-------------------------------------------------------------------------------------------|----------------------------------------|----------------------------|------------|----------------------------|----------------------------|------------|----------------------------|-----------------|-------------------------------------------------|
| 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 Commerical 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                                   |
| 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      |

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

|                                                                                      |             |                      |            |                        |                               |            |                        |                 |                           |
|--------------------------------------------------------------------------------------|-------------|----------------------|------------|------------------------|-------------------------------|------------|------------------------|-----------------|---------------------------|
| 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             |
| 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>                                                                      | <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> |
| 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             |

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|                                                                   |                                   |         |      |         |         |      |         |     |               |
|-------------------------------------------------------------------|-----------------------------------|---------|------|---------|---------|------|---------|-----|---------------|
| 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 |

### SERVICE: STREET NAME AND NUMBERING

| Street Naming and Numbering                          | UNIT | Charges 23/24 |      |                 | Proposed charges 24/25 |      |                 | % change | Basis for charging |
|------------------------------------------------------|------|---------------|------|-----------------|------------------------|------|-----------------|----------|--------------------|
|                                                      |      | Basic (£)     | VAT  | Total 23/24 (£) | Basic (£)              | VAT  | Total 24/25 (£) |          |                    |
|                                                      |      |               | 0.20 |                 |                        | 0.2  |                 |          |                    |
| 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      |

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|                                                        |  |       |      |       |       |      |       |      |               |
|--------------------------------------------------------|--|-------|------|-------|-------|------|-------|------|---------------|
| 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 |
|--------------------------------------------------------|--|-------|------|-------|-------|------|-------|------|---------------|

### 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      |

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

|                                           |           |                      |            |                        |                               |            |                        |                 |                           |
|-------------------------------------------|-----------|----------------------|------------|------------------------|-------------------------------|------------|------------------------|-----------------|---------------------------|
| 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>                      |           |                      | 0.00       |                        |                               | 0.00       |                        |                 |                           |
| 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             |
| 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             |

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

|                             |           |                      |            |                        |                               |            |                        |                 |                           |
|-----------------------------|-----------|----------------------|------------|------------------------|-------------------------------|------------|------------------------|-----------------|---------------------------|
| 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             |
| 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>       | 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> |
| 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>   |           |                      |            |                        |                               |            |                        |                 |                           |

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

|                                                                         |      |                      |            |                        |                               |            |                        |                 |                           |
|-------------------------------------------------------------------------|------|----------------------|------------|------------------------|-------------------------------|------------|------------------------|-----------------|---------------------------|
| 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             |
| 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<br/>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             |

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

|                                            |  |        |      |        |        |      |        |    |               |
|--------------------------------------------|--|--------|------|--------|--------|------|--------|----|---------------|
| 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 |

### 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      |

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

|                                                                             |                 |                      |            |                        |                               |            |                        |                 |                           |
|-----------------------------------------------------------------------------|-----------------|----------------------|------------|------------------------|-------------------------------|------------|------------------------|-----------------|---------------------------|
| 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                 |
|                                                                             |                 | <b>Charges 23/24</b> |            |                        | <b>Proposed charges 24/25</b> |            |                        |                 |                           |
| <b>Private Sector Housing Agency</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> |
| 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                 |

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|                                          |                                          |                              |       |        |                              |       |        |     |               |
|------------------------------------------|------------------------------------------|------------------------------|-------|--------|------------------------------|-------|--------|-----|---------------|
| 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 |

### 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 |

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

|                                                 |             |                      |            |                        |                               |            |                        |                 |                                             |
|-------------------------------------------------|-------------|----------------------|------------|------------------------|-------------------------------|------------|------------------------|-----------------|---------------------------------------------|
| 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 |
| <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 |

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

|                                                               |             |                      |            |                        |                               |            |                        |                 |                                             |
|---------------------------------------------------------------|-------------|----------------------|------------|------------------------|-------------------------------|------------|------------------------|-----------------|---------------------------------------------|
| 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>         |             |                      |            |                        |                               |            |                        | 0.00            |                                             |
| 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> |             |                      |            |                        |                               |            |                        | 0.00            |                                             |
| 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 |
| 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 |

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

|                                             |             |                      |            |                        |                               |            |                        |                 |                                             |
|---------------------------------------------|-------------|----------------------|------------|------------------------|-------------------------------|------------|------------------------|-----------------|---------------------------------------------|
| 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 |
| 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 |

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

|                                             |             |                      |            |                        |                               |            |                        |                 |                                             |
|---------------------------------------------|-------------|----------------------|------------|------------------------|-------------------------------|------------|------------------------|-----------------|---------------------------------------------|
| 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 |
| 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 |

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|                                             |             |                      |            |                        |                               |            |                        |                 |                                             |
|---------------------------------------------|-------------|----------------------|------------|------------------------|-------------------------------|------------|------------------------|-----------------|---------------------------------------------|
| 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 |
| 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 |

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|                                                                                                 |             |                      |            |                        |                               |            |                        |                 |                                                 |
|-------------------------------------------------------------------------------------------------|-------------|----------------------|------------|------------------------|-------------------------------|------------|------------------------|-----------------|-------------------------------------------------|
| 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 |
| 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>                       |

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|                                                                                          |             |                      |            |                        |                               |            |                        |                 |                                                 |
|------------------------------------------------------------------------------------------|-------------|----------------------|------------|------------------------|-------------------------------|------------|------------------------|-----------------|-------------------------------------------------|
| 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 |
| <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> |            |                        |                 |                                                 |
|                                                                                          | <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>                       |

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

|                                                                                                          |  |                      |      |         |                               |      |         |      |                                                 |  |
|----------------------------------------------------------------------------------------------------------|--|----------------------|------|---------|-------------------------------|------|---------|------|-------------------------------------------------|--|
| 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 |  |
| 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> |      |         |      |                                                 |  |

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

|                                                                                                                            | UNIT | Basic (£) | VAT  | Total 23/24 (£) | Basic (£) | VAT  | Total 24/25 (£) | % change | Basis for charging                              |
|----------------------------------------------------------------------------------------------------------------------------|------|-----------|------|-----------------|-----------|------|-----------------|----------|-------------------------------------------------|
| 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 |
| <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 |

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

| 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 |                                                 |
| 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 |
| 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     |

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

### SERVICE: TENNIS COURTS

| Tennis Courts                                                                    | UNIT | Charges 23/24 |      |                 | Proposed charges 24/25 |      |                 |          | Basis for charging |
|----------------------------------------------------------------------------------|------|---------------|------|-----------------|------------------------|------|-----------------|----------|--------------------|
|                                                                                  |      | Basic (£)     | VAT  | Total 23/24 (£) | Basic (£)              | VAT  | Total 24/25 (£) | % change |                    |
| 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. Leamore</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      |

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|                                     |      |                               |            |                        |                               |            |                        |                 |                           |
|-------------------------------------|------|-------------------------------|------------|------------------------|-------------------------------|------------|------------------------|-----------------|---------------------------|
| 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             |
| 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>            | 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> |
| 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>             |                                         |               |      |                 |                        |      |                 |          |                    |

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|                                                                                                                                       |                             |                      |            |                        |                               |            |                        |                 |                           |
|---------------------------------------------------------------------------------------------------------------------------------------|-----------------------------|----------------------|------------|------------------------|-------------------------------|------------|------------------------|-----------------|---------------------------|
| 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             |
| 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       |                        |                 |                           |

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

|                                 |            |      |      |      |      |      |      |      |               |
|---------------------------------|------------|------|------|------|------|------|------|------|---------------|
| 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 |

### SERVICE: REGISTER OFFICE

| Register Office                                                                                                                                           | UNIT | Charges 23/24 |      |                 | Proposed charges 24/25 |      |                 | % change | Basis for charging |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------|------|---------------|------|-----------------|------------------------|------|-----------------|----------|--------------------|
|                                                                                                                                                           |      | Basic (£)     | VAT  | Total 23/24 (£) | Basic (£)              | VAT  | Total 24/25 (£) |          |                    |
| <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>                                                                                                                   |      |               |      |                 |                        |      |                 |          |                    |
| <i>2.1 Marriage by Superintendent Registrar's certificate</i>                                                                                             |      |               |      |                 |                        |      |                 |          |                    |

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

|                                                                                                                          |      |                      |            |                        |                               |            |                        |                 |                           |
|--------------------------------------------------------------------------------------------------------------------------|------|----------------------|------------|------------------------|-------------------------------|------------|------------------------|-----------------|---------------------------|
| 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                 |
| 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                 |

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

|                                                                                                       |             |                      |            |                        |                               |            |                        |                 |                           |
|-------------------------------------------------------------------------------------------------------|-------------|----------------------|------------|------------------------|-------------------------------|------------|------------------------|-----------------|---------------------------|
| <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                 |
| 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>                                                                                  |             |                      |            |                        |                               |            |                        |                 |                           |

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|                                                                                                      |             |                      |            |                        |                               |            |                        |                 |                                            |
|------------------------------------------------------------------------------------------------------|-------------|----------------------|------------|------------------------|-------------------------------|------------|------------------------|-----------------|--------------------------------------------|
| <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) |
| <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>                                                                               | <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>                  |
| 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) |

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|                                        |  |         |      |         |         |      |         |     |                                            |
|----------------------------------------|--|---------|------|---------|---------|------|---------|-----|--------------------------------------------|
| 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                              |

### 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          |

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|                        |                   |        |      |        |        |      |        |     |           |
|------------------------|-------------------|--------|------|--------|--------|------|--------|-----|-----------|
| Sale or disposal stage | Upon goods levied | 110.00 | 0.00 | 110.00 | 110.00 | 0.00 | 110.00 | 0.0 | Statutory |
|------------------------|-------------------|--------|------|--------|--------|------|--------|-----|-----------|

### SERVICE: PARKING

| Emission Band | Business Permit Bands Petrol & Diesel (compliant) - Permit Price Single Business Zone |                        |            | Business Permit Bands Diesel (non-compliant) - Permit Price Single Business Zone |                        |            |
|---------------|---------------------------------------------------------------------------------------|------------------------|------------|----------------------------------------------------------------------------------|------------------------|------------|
|               | 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        |

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|    |         |          |     |          |          |     |
|----|---------|----------|-----|----------|----------|-----|
| 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 |

|           | 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        |

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|    |          |          |     |          |          |     |
|----|----------|----------|-----|----------|----------|-----|
| 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 |

| 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        |

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

|               | Community Health Permit Bands Petrol & Diesel (compliant) - Permit Price |                        |            | Community 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                                                                   | 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      |
| 9             | 825.00                                                                   | 618.75                 | -25        | 895.00                                                              | 693.75                 | -22.5      |
| 10            | 880.00                                                                   | 660.00                 | -25        | 950.00                                                              | 735.00                 | -22.6      |
| Emission Band | Charges 23/24                                                            | Proposed Charges 24/25 | % Increase | Charges 23/24                                                       | Proposed Charges 24/25 | % Increase |
| 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  |                        |            |

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

| 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        |
| 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        |

|               | Estate Year 1 Permit Bands Petrol & Diesel (compliant) - Permit Price |                        |            | Estate Year 1 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             | 8.75                                                                  | 9.42                   | 7.7        |                                                                  |                        |            |
| 1             | 17.50                                                                 | 18.85                  | 7.7        | 35.00                                                            | 37.60                  | 7.4        |

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

|    |       |       |     |       |       |     |
|----|-------|-------|-----|-------|-------|-----|
| 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 |

| 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        |

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

|    |        |        |     |        |        |     |
|----|--------|--------|-----|--------|--------|-----|
| 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 |

| 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         |

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

|               | Lewisham Homes Staff Daily Permit Bands Petrol & Diesel (compliant) |                        |            | Lewisham Homes 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                                                                   | 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       |

|               | 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        |

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

|    |      |      |     |      |      |     |
|----|------|------|-----|------|------|-----|
| 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        |
| 4             | 110.00                                                                    | 118.47                 | 7.7        | 124.00                                                               | 133.47                 | 7.6        |
| Emission Band | Charges 23/24                                                             | Proposed Charges 24/25 | % Increase | Charges 23/24                                                        | Proposed Charges 24/25 | % Increase |
| 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        |

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

|    |        |        |     |        |        |     |
|----|--------|--------|-----|--------|--------|-----|
| 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 |

| Emission Band | Staff Daily Permit Bands Petrol & Diesel (compliant) |                        |            | Staff daily Permit Bands Diesel (non-compliant) |                        |            |
|---------------|------------------------------------------------------|------------------------|------------|-------------------------------------------------|------------------------|------------|
|               | Charges 23/24                                        | Proposed Charges 24/25 | % Increase | Charges 23/24                                   | Proposed Charges 24/25 | % Increase |
| 0             | 0.74                                                 | 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        |
| 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        |

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

|    |          |          |     |          |          |     |
|----|----------|----------|-----|----------|----------|-----|
| 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 |

| 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        |

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

|    |       |        |     |       |        |     |
|----|-------|--------|-----|-------|--------|-----|
| 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 |
| 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 |

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

|   |      |      |     |      |      |     |
|---|------|------|-----|------|------|-----|
| 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 |

DRAFT

**SERVICE: BEREAVEMENT**

|                      |      | Charges 23/24 |  |  | Proposed charges 24/25 |  |  |  |  |  |
|----------------------|------|---------------|--|--|------------------------|--|--|--|--|--|
| Bereavement Services | UNIT | VAT           |  |  | VAT                    |  |  |  |  |  |
|                      |      |               |  |  |                        |  |  |  |  |  |

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

|                                                                   |  | Basic (£) |             | Total 23/24 Resident (£) | 23/24 Non-Resident (£) | Basic (£)                     |             | 24/25 Resident (£) | 24/25 Non-Resident (£) | Resident increase % | Non-resident increase % | Basis for charging |
|-------------------------------------------------------------------|--|-----------|-------------|--------------------------|------------------------|-------------------------------|-------------|--------------------|------------------------|---------------------|-------------------------|--------------------|
| <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      |
| 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> |             |                    |                        |                     |                         |                    |

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

| 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 |
|--------------------------------------------------------------|---------------|-----------|-------------|--------------------------|------------------------|-----------|-------------|--------------------|------------------------|---------------------|-------------------------|--------------------|
| 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      |
| Sunday Burial Supplement <b>with chapel</b>                  |               |           | 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>                                         |               |           |             |                          |                        |           |             |                    |                        |                     |                         |                    |

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

| 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 (£) |                     |                         |                    |
| 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      |
| Exhumation Fees                                                  |      |               |             |                          |                        |                        |             |                    |                        |                     |                         |                    |
| 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      |
| Crematoria Fees                                                  |      |               |             |                          |                        |                        |             |                    |                        |                     |                         |                    |
| 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      |
| 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      |

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

|                                               |      | 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 |
| 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      |
| <b>Miscellaneous</b>                          |      |               |             |                          |                        |                        |             |                    |                        |                     |                         |                    |
| Scattering of Cremated Remains from elsewhere |      |               | Non Vatable | 85.00                    | 85.00                  |                        | Non Vatable | 91.00              | 91.00                  | 7.06%               | 7.06%                   | Discretionary      |

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

|                                              |      |                      |             |                          |                        |                               |             |                    |                        |                     |                         |                    |
|----------------------------------------------|------|----------------------|-------------|--------------------------|------------------------|-------------------------------|-------------|--------------------|------------------------|---------------------|-------------------------|--------------------|
| Customs or duplicate                         |      |                      | Non Vatable | 39.00                    | 39.00                  |                               | Non Vatable | 42.00              | 42.00                  | 7.69%               | 7.69%                   | 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 |
| 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)  |      |                 |          |                    |
| Fly tip - more than a small car boot load    | Single Fine                |                           |      |                 | £1000 (early payment £650) |      |                 |          |                    |

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

|           |             |                                      |                               |
|-----------|-------------|--------------------------------------|-------------------------------|
| Littering | Single Fine | £150 (Early payment discount of £90) | £200 (early payment of £140). |
|-----------|-------------|--------------------------------------|-------------------------------|

### 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             |

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

|                                |      |                      |            |                        |                               |            |                        |                 |                           |
|--------------------------------|------|----------------------|------------|------------------------|-------------------------------|------------|------------------------|-----------------|---------------------------|
| 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:                |      |                      |            |                        |                               |            |                        |                 |                           |
| 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

| Adult Social Care             | UNIT          | Charges 23/24 |             |                 | Proposed charges 24/25 |            |                 | % change | Basis for charging |
|-------------------------------|---------------|---------------|-------------|-----------------|------------------------|------------|-----------------|----------|--------------------|
|                               |               | Basic (£)     | VAT<br>0.20 | Total 22/23 (£) | Basic (£)              | VAT<br>0.2 | Total 24/25 (£) |          |                    |
| 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

| Home Ownership                | UNIT | Charges 23/24 |      |                 | Proposed charges 24/25 |      |                 |          |                    |
|-------------------------------|------|---------------|------|-----------------|------------------------|------|-----------------|----------|--------------------|
|                               |      | 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      |

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

|                                                                 |  |        |      |        |        |      |        |      |               |
|-----------------------------------------------------------------|--|--------|------|--------|--------|------|--------|------|---------------|
| 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 |

### SERVICE: HOUSING NEEDS AND REFUGEE SERVICE

|                                                 |                | 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>       | UNIT           |               |       |                 |                        |       |                 |          |                    |
| 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

|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |                                                             |                                                                   |                                                           |                                                |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------|-------------------------------------------------------------------|-----------------------------------------------------------|------------------------------------------------|
| <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 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>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>Demographic overview</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> <li>- 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.</li> </ul> |                                                             |                                                                   |                                                           |                                                |

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

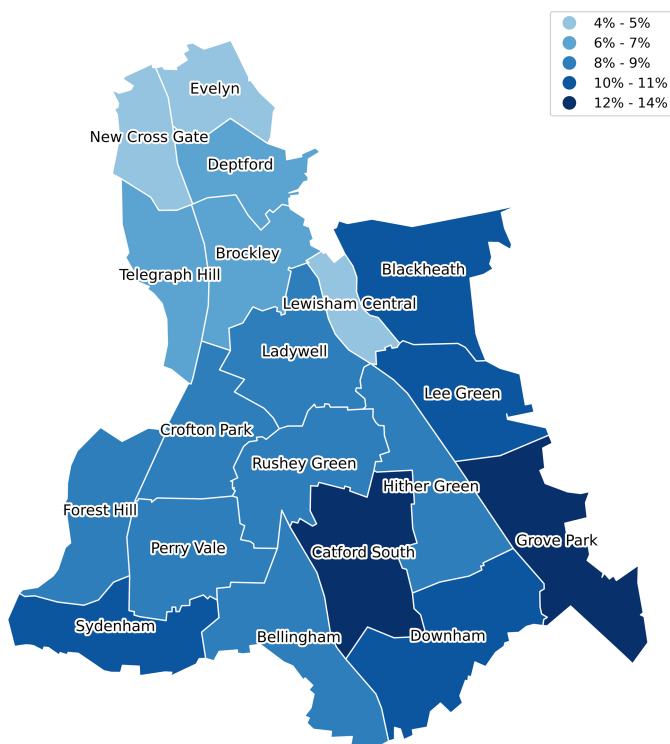
- 23.4% of residents are aged 19 or younger
- 32.5% of residents are married
- 9.6% of residents are aged over 65
- 52.5% of residents are women
- 55.8% identify as having a faith.

### 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.
- 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.

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- 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.

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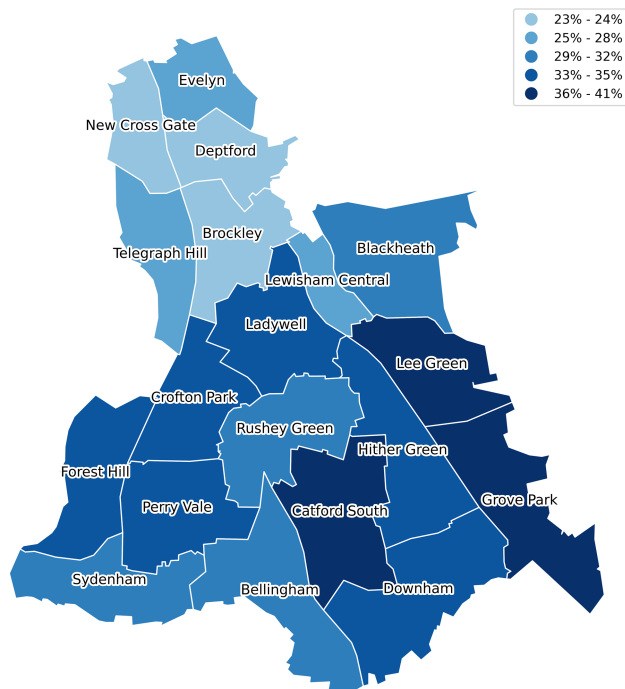
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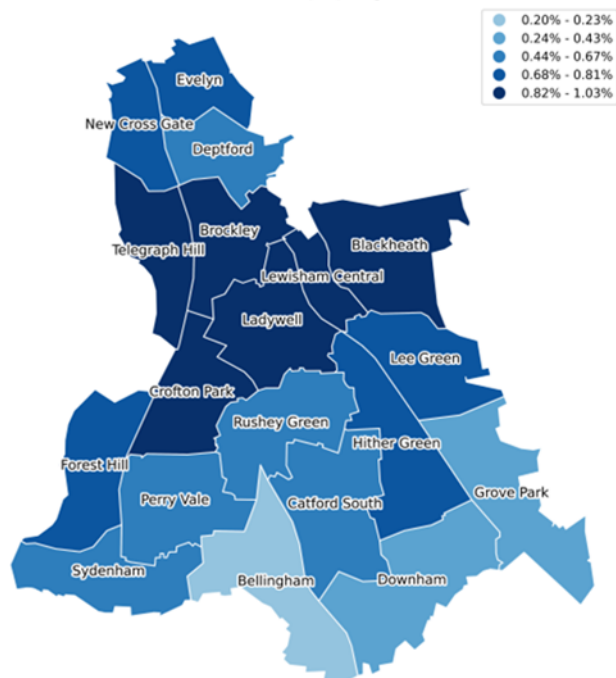
### Percentage of residents who are married (opposite sex or same sex)

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%.

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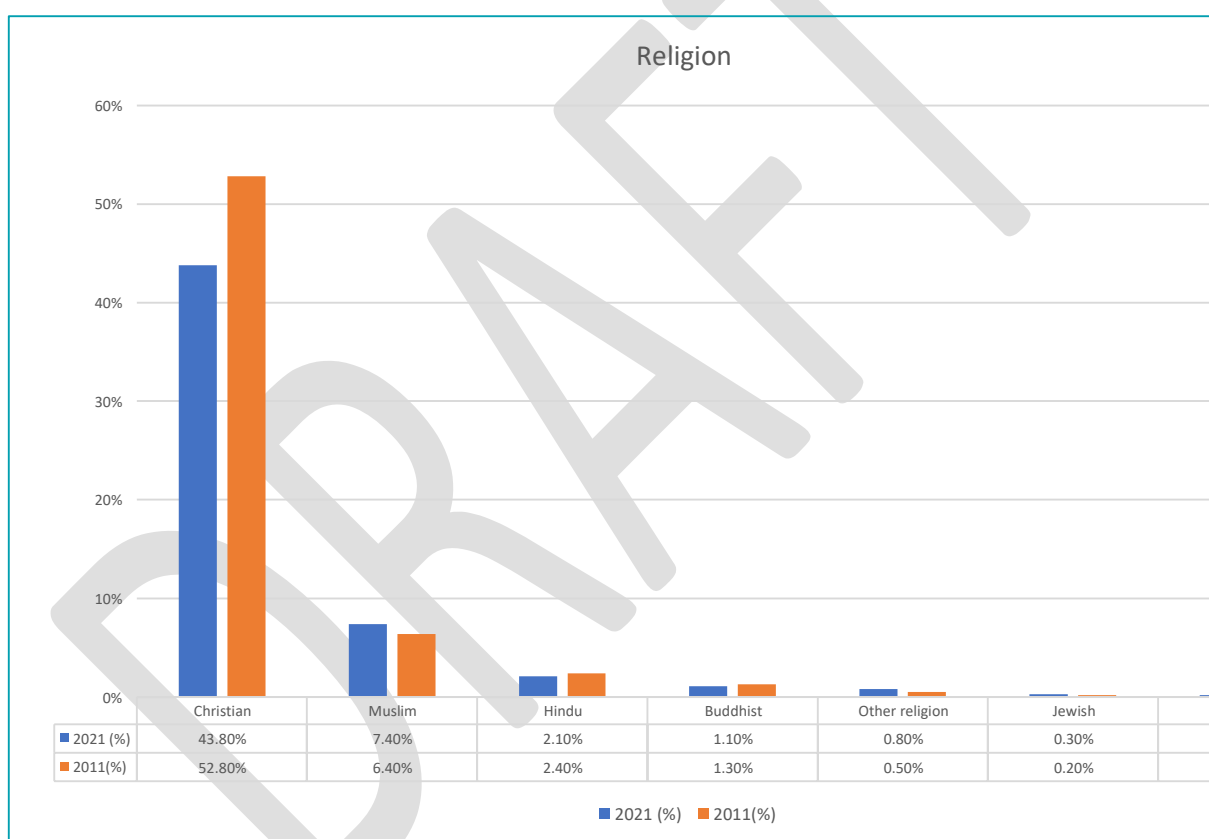
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## APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

- 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 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.

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

- 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.

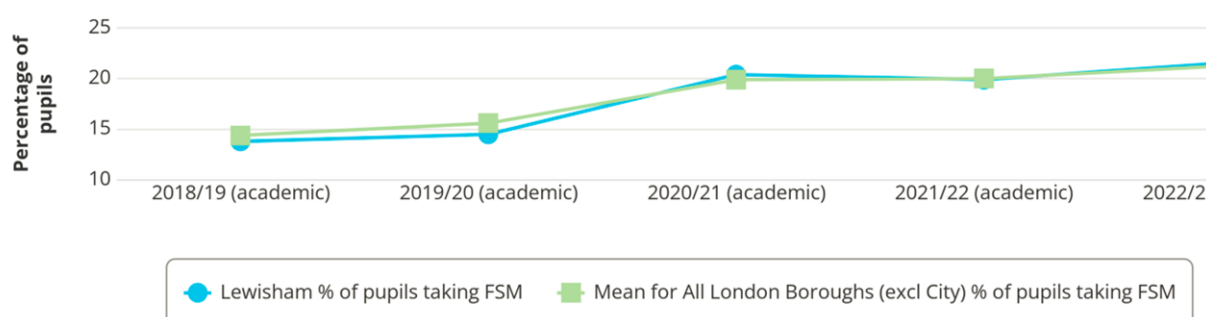
### Sexual Orientation

- 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%).

### 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

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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)
  - 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 | H |
|------------|-----------------|-----|--------------------|---------------------|-------|---|
| Age        | 3               | 1   | 1                  | 0                   | 0     | 0 |
| Disability | 2               | 0   | 1                  | 0                   | 1     | 0 |
| Ethnicity  | 2               | 0   | 1                  | 0                   | 0     | 0 |

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|                                 |                                 |                                |                                |                                |                                |                                |
|---------------------------------|---------------------------------|--------------------------------|--------------------------------|--------------------------------|--------------------------------|--------------------------------|
| Gender                          | 0                               | 0                              | 1                              | 0                              | 0                              | 0                              |
| Gender Reassignment             | 1                               | 0                              | 0                              | 0                              | 0                              | 0                              |
| 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                              |
| <b>Totals</b>                   | 2 – high/<br>medium<br>10 - low | 1 – high/<br>medium<br>0 - low | 0 – high/<br>medium<br>7 - low | 0 – high/<br>medium<br>0 - low | 1 – high/<br>medium<br>0 - low | 0 – high/<br>medium<br>0 - low |

----

### High/ medium/ low positive impacts identified through the EIA Screening process

|                                 | Chief Executive                 | CYP                            | Community Services             | Corporate Resources            | Place                          | H           |
|---------------------------------|---------------------------------|--------------------------------|--------------------------------|--------------------------------|--------------------------------|-------------|
| 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           |
| Socio-Economic Inequality       | 1                               | 2                              | 0                              | 0                              | 0                              | 0           |
| <b>Totals:</b>                  | 0 – high/<br>medium<br>10 - low | 3 – high/<br>medium<br>3 - low | 1 – high/<br>medium<br>0 - low | 3 – high/<br>medium<br>1 - low | 3 – high/<br>medium<br>0 - low | 0<br>m<br>0 |

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.

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

- 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 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

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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 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

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- 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:

- 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.

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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.

### **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.

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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.

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

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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.

|                                  |  |
|----------------------------------|--|
| <b>Signature of<br/>Director</b> |  |
|----------------------------------|--|

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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

DRAFT

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

|                                                                                            |                     |               |                  |
|--------------------------------------------------------------------------------------------|---------------------|---------------|------------------|
| 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.

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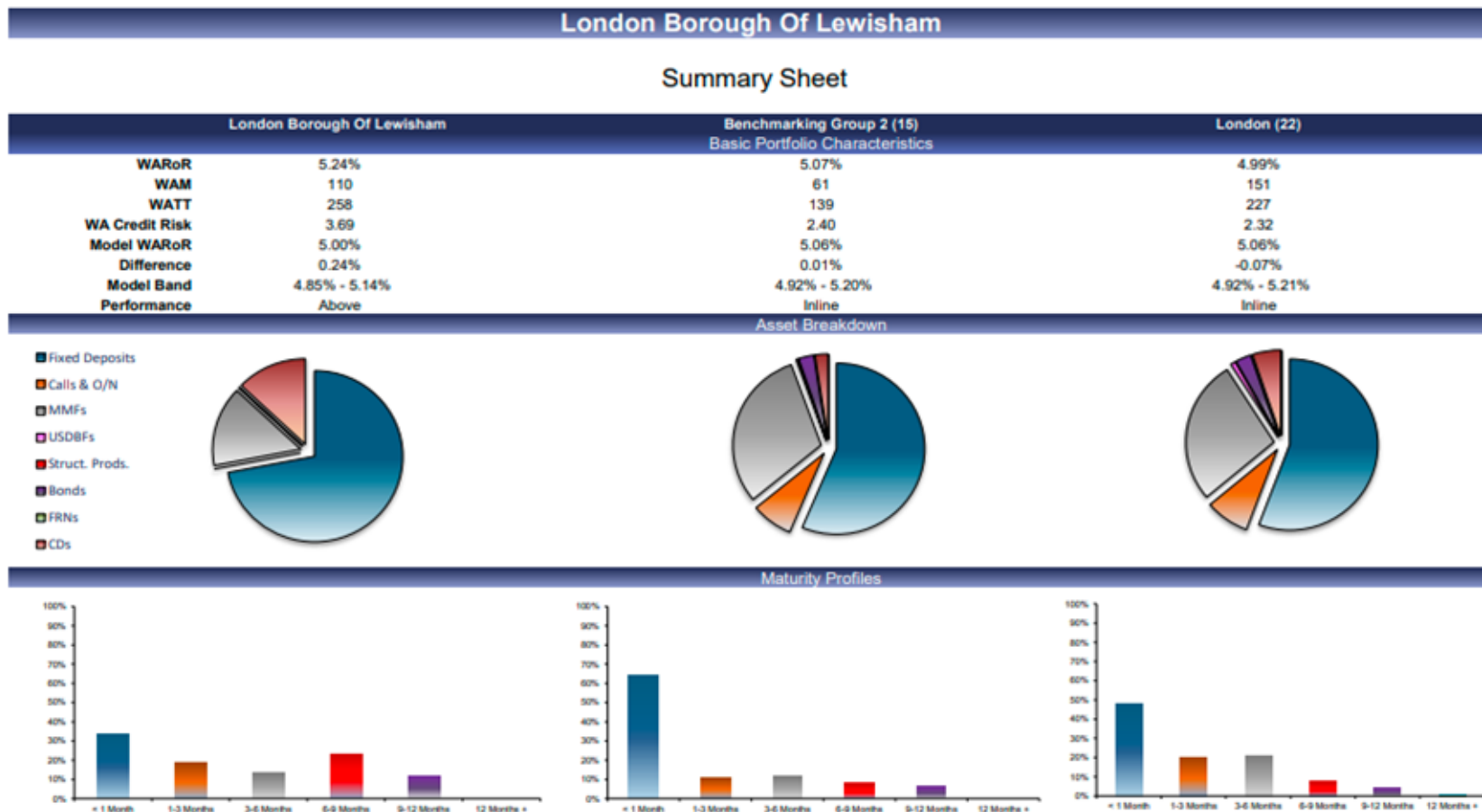
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## APPENDIX Z3: Benchmarking Extract

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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APPENDICES W1 to Z6 (2024/25 BUDGET REPORT)

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

### 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.

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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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