

Cabinet

Tuesday 7 December 2021

11.00 am

Ground floor meeting rooms, 160 Tooley Street, London SE1 2QH

Supplemental Agenda No. 1

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Date: 29 November 2021

Item No. 9.	Classification: Open	Date: 7 December 2021	Meeting Name: Cabinet
Report title:		Adoption of the Southwark Plan 2022	
Ward(s) or groups affected:		All	
Director		Director of Planning and Growth	
Cabinet Member:		Councillor Helen Dennis, Climate Emergency and Sustainable Development	

FOREWORD - CABINET MEMBER FOR THE CLIMATE EMERGENCY AND SUSTAINABLE DEVELOPMENT

The Southwark Plan 2022 is the culmination of many years' work and conversations, exploring how we can deliver substantial improvements in our local communities through development and new infrastructure, whilst also preserving and celebrating our history and heritage. Our planning policies and area visions are designed to help us achieve wider objectives in Southwark – a reduction in inequality, a means to tackle the climate emergency, and to support an economy that provides new jobs and works for everyone.

The pressing need for genuinely affordable housing, is the pre-eminent theme that has underpinned the development of policies in this Southwark Plan. In particular the council has identified and evidenced a huge demand for council housing and other homes available at social rent. This has informed our own council house-building programme, with 2,500 homes due to be delivered or on-site by May 2022, and it is why we will continue to challenge any developer who wants to build in Southwark, to go further, beyond the 35% requirement, in their own plans and provision.

Emerging from the COVID pandemic, and conscious of the Climate and Ecological Emergency, we are aware more than ever of the need for good quality parks and open spaces, for the benefit of the environment and for our own mental health and wellbeing. This Plan sets out our vision for an enhanced natural environment, with 11 hectares of new designated open space, 22 new sites of importance for nature conservation, and a requirement for Biodiversity Net Gain in all new developments. We include stretching targets for the reduction of on-site carbon emissions, and to reflect the Council's ambition to be a carbon neutral borough by 2030, we will be bringing forward an early review of the plan, to further strengthen policy in this area.

Over the next 15 years, we hope to create 58,000 new jobs through opportunities generated by the Southwark Plan, many of which we hope will be good quality, decent green jobs. Initiatives like the Construction Skills Centre, supporting work at the Elephant & Castle, and now at Canada Water, underline our commitment to bring

opportunities to local young people and the Plan also establishes our Affordable Workspace Policy.

In order to bring key policies together under the Southwark Plan 2022, this document includes Area Visions for the Aylesbury, Peckham & Nunhead, and Canada Water, which were previously addressed in Area Action Plans which will now be rescinded. The next iteration of the Old Kent Road Area Action Plan (AAP) will follow the adoption of the Southwark Plan, and will set out our refreshed vision for new homes, jobs and parks in that part of our borough.

Over the years, Southwark has undergone dramatic changes, and those changes in the built environment can sometimes feel unsettling. However, they have also delivered new leisure centres, parks, health centres, cultural venues and youth centres, and transformed our public realm with greening, art, and routes for walking and cycling. We are committed as a council to ensuring that we support residents and businesses through change, and to securing change that delivers real positive benefits and social value for everyone in our borough.

RECOMMENDATIONS

That Cabinet:

1. Agrees the Southwark Plan 2022 at Appendix A for adoption by Council Assembly.
2. Agrees the rescission of the Southwark Plan 2007, the Core Strategy 2011, the Aylesbury Area Action Plan (2010), the Peckham and Nunhead Area Action Plan (2014) and the Canada Water Area Action Plan (2015) by Council Assembly upon adoption of the Southwark Plan 2022 by Council Assembly.
3. Notes the Inspector's Report to the New Southwark Plan at Appendix B and the Main Modifications (and appendices) at Appendix C.
4. Notes the Consultation Report on the Main Modifications provided at Appendix D.
5. Notes the Integrated Impact Assessment (Appendix E), Equalities Impact Assessment (Appendix F) and Habitats Regulations Assessment (Appendix G) which support the adoption of the plan.

BACKGROUND INFORMATION

Background to the Southwark Plan 2022

6. The council have been preparing the New Southwark Plan as the new local plan for Southwark. Upon adoption, it will be known as the Southwark Plan 2022. The Southwark Plan 2022 is a statutory planning document that will provide an overarching strategy for managing growth and development across

the borough for the next 15 years. The plan will set out how we will deliver further regeneration and wider improvements to our borough in the years to come.

7. The Southwark Plan 2022 explains our strategy for regeneration from 2019 to 2036. It will:
 - Set policies to support the provision of new homes including 11,000 new Council homes
 - Protect our existing schools, youth and community facilities in the borough and provide more where this is needed
 - Protect local businesses and attract more businesses into the borough to increase job opportunities
 - Support our high streets and increase the range of shops to increase their vitality
 - Direct growth to certain areas of the borough, predominantly in the Old Kent Road, Elephant and Castle, Canada Water, East Walworth, Blackfriars Road, Bankside and along the River Thames where there is greater public transport accessibility
 - Introduce policies to improve places by enhancing local distinctiveness and protecting our heritage assets
 - Set policies to provide more green infrastructure, tackle the climate emergency and to promote opportunities for healthy activities
 - Designate or extend a number of new public open spaces and require the creation of new public open space on a number of strategic site allocations across the borough.

8. The Southwark Plan 2022 is a spatial plan. Not only does it set out planning policies to guide development but it also explains how development will be delivered and may inform future decisions about investment in infrastructure. The Southwark Plan 2022 will form part of Southwark's development plan along with the London Plan. It is a regeneration strategy for Southwark and will be used to make decisions on planning applications.

Key policy changes

9. The Southwark Plan 2022 includes strategic development targets for the delivery of homes, jobs and office and retail floorspace. Policy also sets out our spatial strategy and where we expect different types of development and require open space to come forward in each of the vision areas in the borough. The plan will deliver the following targets:
 - 40,035 homes between 2019 and 2036 (2,355 new homes per annum), this includes 10,217 homes on small sites between 2019 and 2036 (601 new homes per annum).
 - 11,000 council homes will be delivered by 2043 as part of the overall housing target

- 58,000 total jobs between 2019 and 2036 including at least 1,000 new green jobs through the Southwark Green New Deal¹. The targets for the distribution of jobs are

Borough, Bankside and London Bridge Opportunity Area	10,000
Elephant and Castle Opportunity Area	10,000
Canada Water Opportunity Area	20,000
Old Kent Road Opportunity Area	10,000
Other town centres	8,000

- 460,000 sqm office floorspace between 2019 and 2036 (equating to around 35,500 jobs). Around 80% of new offices will be delivered in the Central Activities Zone. Additional offices will be delivered in the Canada Water and Old Kent Road Opportunity Areas and in town centres;
- 90,000sqm additional employment floorspace between 2019 and 2036 outside the CAZ including industrial, distribution, hybrid and studio workspace;
- 76,670 sqm net new retail floorspace between 2019 and 2036 (6,560sqm convenience retail, 42,130sqm comparison goods retail, 27,980sqm food and beverage). The targets for the distribution of the retail floorspace are:

Elephant and Castle Major Town Centre	10,000sqm
Peckham Major Town Centre	7,000sqm
Canada Water Opportunity Area	40,000sqm
CAZ and district and local town centres	19,670sqm

¹ The council now has a higher target of 5,000 new green jobs in the climate strategy and action plan (2021)

- The growth of other activities that create successful places such as places to work, leisure, arts and culture, sports, schools, health centres and tourist activities. We will encourage developments to focus on the strengths of places that make the different areas of the borough distinctive and respect and integrate with the local and historic context and communities.
 - The location and design of new development contributing to securing our targets of carbon neutrality by 2030 and net zero carbon by 2050;²
 - Increase the provision of open space in the borough by requiring the provision of 11 hectares of new open space as identified in site allocations along with the designation of MOL, BOL and OOS as identified on the Policies Map.
10. The Plan introduces a fast track route for developments delivering 40% social rented and intermediate housing with a policy compliant mix and in the Aylesbury Action Area Core delivering 60% social rented and intermediate housing with a policy compliant mix, where the scheme does not have to follow a viability tested route to encourage an increase in the provision of affordable housing.
 11. It introduces the requirement for all development that proposes housing to provide affordable housing or a payment in lieu towards the delivery of council homes. The Plan also includes the requirement for the provision of a minimum of 35% affordable housing on direct let student housing schemes, as well as the provision of 27% of student rooms at affordable student rent (defined by the Mayor of London), subject to viability. Nomination schemes for student housing are required to provide a minimum of 35% of rooms at affordable student rent (defined by the Mayor of London), subject to viability.
 12. The Plan introduces the requirement for at least 10% or more affordable workspace on developments proposing 500sqm GIA or employment floorspace.
 13. The climate change target for this Plan is to be net zero by 2050 as set out in the Climate Change Act. The council has declared a Climate Emergency with the ambition to reach carbon neutrality by 2030. This plan is a stepping stone towards meeting this 2030 ambition and there is a climate change thread throughout the Plan to address climate change. The Southwark Plan 2022 requires the reduction of emissions by 100% on 2013 regulations for residential developments, and 40% for non-residential, and there will be an early review of the Plan to encourage greater on site carbon reduction performance and ensure the carbon offset price fully covers off setting costs.

² This target means the Plan will contribute to securing the national net zero target by 2050 and the borough target of doing all we can to be net zero by 2030.

14. While the Southwark Plan 2022 must be in general conformity with the London Plan and the National Planning Policy Framework, it can adapt some of these policies to reflect specific issues in Southwark. It will replace the Core Strategy (2011), the saved Southwark Plan (2007), the Aylesbury Area Action Plan (2010), the Peckham and Nunhead Area Action Plan (2014) and the Canada Water Area Action Plan (2015).
15. The Southwark Plan 2022 at Annex 5 sets out the policies and site allocations from the Area Actions Plans that the Southwark Plan 2022 is replacing.
16. A review of all of the policies in the Area Action Plans ('AAPs') took place and they have been replaced in the Southwark Plan 2022 with more up to date policies. In the Aylesbury AAP there were two policies in the AAP which provided higher standards. These were the family homes and the space standards. Therefore these have been brought into the plan. There is also a modification to reduce the parking standards requested by TfL to enable general conformity with the London Plan.
17. A review of all of the site allocations in the AAPs took place, the Council set out the current status of each site in the AAPs to decide which sites should be taken forward in the Southwark Plan 2022. The Council removed all of the sites that are being built or that were completed from the list to take forward to the Southwark Plan 2022. All of the other sites that were in the AAPs have been included in the Southwark Plan 2022 where necessary. A site allocation for the Aylesbury Area Action Core has been added to the Southwark Plan 2022 at the Main Modifications which sets out the development requirements in the Action Area Core, to ensure the delivery of homes and social rented homes and it also includes design guidance, including tall building guidance as set out in the Area Action Plan. Some of the smaller sites from the Area Action Plans have not been included as they can come forward as windfall sites through the development management policies in the Southwark Plan 2022.
18. Further information on the rescinding of the AAPs is set out in EIP211³ - Rescinding Note and EIP202a – Aylesbury Background Paper.

KEY ISSUES FOR CONSIDERATION

Southwark Plan 2022

19. The Southwark Plan 2022 contains the following sections.

Area Visions

20. Area Visions provide the strategic vision for the future of Southwark's distinct places. They set out key infrastructure enhancements, opportunities for public realm and transport improvements and growth opportunities. Area Visions also

³ EIP document numbers relate to Examination in Public documents available on the NSP Examination website

identify the character of different places to be renewed, retained or enhanced. Development proposals should be within the context of the relevant Area Vision and should demonstrate how they contribute towards the strategic vision for that area.

Strategic Targets

21. The strategic development targets policy set out the targets the Plan seeks to achieve for the delivery of homes, jobs and office and retail floorspace. The Southwark's Places policy also sets out our spatial strategy and where we expect different types of development and require open space to come forward in each of the vision areas in the borough.

Strategic Policies

22. Strategic policies are borough-wide policies which set out the council's strategy to work with local people to improve neighbourhoods and create new opportunities for the future. The Southwark Plan 2022 contains six strategic policies to deliver the Borough Plan's values and priorities spatially ('Homes for all', 'Southwark Together', 'A great start in life', 'A green and inclusive economy', 'Thriving neighbourhoods and tackling health inequalities' and 'Climate Emergency').

Development Management Policies

23. Development management policies are detailed planning policies which are used to assess planning applications.

Site Allocations

24. Site Allocations are planning policies which apply to potential development sites of strategic importance. Site Allocations are needed to ensure that when strategic sites come forward for redevelopment they integrate into their surroundings and contribute towards meeting the local area's spatial needs. Site allocations are also needed to demonstrate the Southwark Plan 2022 has been developed in conformity with the London Plan, which requires boroughs to identify strategic development sites which can meet housing targets and future infrastructure and land use needs.
25. Site Allocations set out land use requirements that must be provided as part of any redevelopment alongside other acceptable land uses. Site Allocations may specify development provides new public open space, public access routes or social infrastructure, such as health or education facilities. Site Allocations are not required for sites which are likely to be redeveloped acceptably under the development management policies of the Southwark Plan 2022.

Monitoring Framework

26. A comprehensive monitoring framework has been prepared to accompany the plan which will be used to monitor development coming forward in the borough.
27. This monitoring framework details the data we will collect and publish working towards a new digital monitoring system. Monitoring data and results will be published in the Authority Monitoring Report (AMR). The AMR sets out the type and amount of development and conservation taking place in Southwark. It sets out an evaluation of whether planning policies are making a difference and lets us assess how the policies can be improved by future plan making. These will enable us to measure our progress and success, ensuring we track and evaluate changes that make Southwark successful, such as full employment, health improvements, a more skilled labour market and places that are safe and clean.
28. This framework replaces the monitoring frameworks in the Aylesbury Area Action Plan, Canada Water Area Action Plan and Peckham and Nunhead Area Action Plan. Where there are relevant indicators from the AAPs they have been carried forward into this framework.

Inspector's Report

29. The Inspector's report contains their assessment of the New Southwark Plan in terms of Section 20(5) of the Planning & Compulsory Purchase Act 2004 (as amended). It considers:
 - whether the Plan's preparation has complied with the duty to co-operate;
 - whether the Plan is compliant with the legal requirements; and
 - whether it is sound as set out in the National Planning Policy Framework (NPPF) 2021 (paragraph 35) which is clear that in order to be sound, a Local Plan should be positively prepared, justified, effective and consistent with national policy.
30. The Report concludes that the Duty to Cooperate has been met and that with the recommended main modifications set out in the Appendix, the New Southwark Plan satisfies the requirements referred to in Section 20(5)(a) of the 2004 Act and is sound.
31. The Main Modifications are provided at Appendix C, these have been incorporated into the Southwark Plan 2022 at Appendix A.
32. Following the Main Modifications consultation (6 August to 24 September 2021) the Inspectors have made further amendments to a number of the policies, these are:
 - Old Kent Road area vision – amended Bakerloo Line Extension Phase 2 developments from 2023-2027 to post 2023

- Policy P5 (Student homes) – amended wording to include subject to viability and amended the wording to be clear on affordable student rooms
 - Policy P55 (Protection of amenity) – moved the additional text that was added to the reasons in the main modification to the policy itself
 - Policy P28 (Strategic Protected Industrial Land), P29 (office and business development) and P30 (affordable workspace) - amended the wording slightly of the additional clause relating to using conditions to restrict changes of use within Class E to ensure that the use of conditions meets the tests set out in national policy.
 - Policy IP3 (CIL and S106 planning obligations) – amended to clarify in the policy that the term ‘policy requirements’ would include the ‘must’ and ‘should’ requirements set out in the individual site allocation policies.
 - NSP51 (land between St Thomas Street, Fenning Street, Melior Place and Snowfields) –added medical or healthcare uses as options to the site requirements.
 - NSP71 (Aylesham Centre and Peckham Bus Station) – changed the capacity back to an indicative capacity of 850 homes rather than the minimum capacity of 700 – this will be updated again in the housing trajectory.
 - Policy P17 (efficient use of land) - changed to “optimises land use” instead of “optimises the efficient use of land”.
 - Policy P18 (listed buildings and structures) – changed conserve and enhance to conserve or enhance.
 - Policy P19 (conservation areas) – changed conserve to preserve and changed character and appearance to character or appearance
 - Policy P21 (borough views) – changed development must to development should.
33. The numbering of the policies and site allocations have been updated throughout the Southwark Plan 2022 to take account of any modifications, including new policies or amendments to the site allocations. Therefore the final numbering will differ from the policy and site allocation references in Paragraph 32, the Inspector’s Report and the Main and Additional Modifications and the supporting documents (Integrated Impact Assessment, Equalities Impact Assessment and Habitats Regulation Assessment).

Consultation on the New Southwark Plan

34. There have been several stages of consultation between 2013 and 2021. Details of the public consultation carried out to date are set out in the Consultation Report at Appendix D.
35. The New Southwark Plan was submitted to the Planning Inspectorate for Examination in January 2020. As part of the Examination in Public another consultation was carried out from August to October 2020, which allowed the council to gain feedback on changes to the plan which were recommended by

the Inspectors (EIP27A and B, Council's Proposed Changes to the Submitted New Southwark Plan, August 2020).

36. The public hearings took place virtually from 23 February – 11 March 2021 and 19 April – 30 April 2021. Following these hearings, The Inspectors wrote a post hearings letter on 28 May 2021 and under Section 20(7)(c) of the Planning and Compulsory Purchase Act (2004). The Council asked the Inspectors to recommend Main Modifications to ensure the Plan is sound. The Main Modifications comprised the Council's Proposed Changes to the Submitted New Southwark Plan and any changes required for soundness or arose during the Examination in Public, The Council consulted on the Main Modifications for 7 weeks as recommended by the Inspectors from 6 August 2021 to 24 September 2021.
37. The consultation sought comments only relating to the main modifications however additional modifications were also published.
38. "Main modifications" are material changes to the submitted Plan which are necessary to make it sound and legally compliant. Main modifications can only be recommended by Inspectors at the request of the Local Planning Authority.
39. "Additional modifications" (minor modifications) are proposed non-consequential amendments to the Plan not necessary for soundness. These generally involve changes that enhance the clarity of the plan without materially affecting the implementation of plan policies and to provide factual updates. The examination does not concern itself with 'additional modifications' and these changes are a matter for the Council to make to its plan. The Inspectors advised that when consulting on proposed main modifications, the Council also publishes a schedule of its additional modifications for completeness. Additional Modifications were published at the same time.
40. The Inspectors have considered all duly made representations on the Main Modifications to the New Southwark Plan. 68 representations were received to the Main Modifications to the New Southwark Plan. Summaries of the consultation representations received and the council's response to the representations (based on the Inspectors report) are attached at Appendix D.

Weighting of the Southwark Plan 2022

41. Paragraph 48 of the NPPF states that decision makers may give weight to relevant policies in emerging plans according to the stage of preparation of the emerging plan, the extent to which there are unresolved objections to the policy and the degree of consistency with the Framework.
42. The Inspectors have issued their Inspector's Report setting out the Main Modifications required to the New Southwark Plan which have been incorporated into the Plan at Appendix A. As the Plan is at an advanced stage and the Inspectors have confirmed the Plan is sound subject to the Main

Modifications, it should be afforded 'substantial' weight in decision making going forward.

43. The recommendation to Council Assembly will be that the plan is adopted in February 2022 and will replace the saved policies of the 2007 Southwark Plan, the 2011 Core Strategy, the Aylesbury Area Action Plan 2010, the Peckham and Nunhead Area Action Plan 2014 and the Canada Water Area Action Plan 2015.

Next Steps

44. The Inspectors have written their report and recommended that the Plan can be adopted subject to the Main Modifications being made to the Plan. Following consideration at Cabinet, the Plan will be considered at Council Assembly for final adoption in February 2022 and will have full weight on adoption.
45. The adopted Plan will be referred to as 'the Southwark Plan' (2022).
46. Following adoption, the plan will be reviewed and updated on an ongoing basis to take into account any changing circumstances affecting Southwark or any changes in regional and national policy as required.

Plan Review

47. The Inspector's Report identifies areas where some issues would be monitored upon implementation of the plan and any changes to policies required would be appropriate in a future plan review. The Inspectors identified the following potential areas:
 - Gypsies and Travellers – if required to take into account a London wide approach
 - House boats - to respond to both the Council's emerging evidence and any wider London approach on the matter
 - Elephant and Castle site allocations - long-term effects of the Covid19 pandemic on the demand for commercial floorspace and whether this points to an alternative strategy or more flexible approach to the mix of uses on allocated sites in this part of the Borough
 - Climate change – responding to the changing context on climate change as part of plan review
 - Retail - ongoing monitoring and the usual processes of plan review will inform the appropriate timing as to when the Plan's retail policies should be revisited
 - It would be a matter for plan review as to whether further specificity is required to guide tree lined new streets in the Borough
 - Transport policies - the monitoring framework will provide for measuring the effectiveness on transport policies in the Southwark Plan 2022 and whether further intervention/mitigation would be necessary as part of the plan review process.

- Monitoring the phased delivery of the Canada Water Masterplan

Community Impact Statement/Equalities (including socio-economic impacts) Impact Statement

48. The Public Sector Equality Duty (PSED) contained in Section 149 (1) of the Equality Act 2010 imposes a duty on public authorities (including the Council to have, in the exercise of their functions, due regard to three “needs” which are central to the aims of the Act
- a) The need to eliminate discrimination, harassment, victimisation and any other conduct prohibited by the Act
 - b) The need to advance equality of opportunity between persons sharing a relevant protected characteristic and persons who do not share it. This involves having due regard to the need to:
 - Remove or minimise disadvantages suffered by persons who share a relevant protected characteristic that are connected to that characteristic
 - Take steps to meet the needs of persons who share a relevant protected characteristic that are different from the needs of persons who do not share it;
 - Encourage persons who share a relevant protected characteristic to participate in public life or in any other activity in which participation by such persons is disproportionately low
 - c) The need to foster good relations between persons who share a relevant protected characteristic and those who do not share it. This involves having due regard, in particular, to the need to tackle prejudice and promote understanding.
49. The protected characteristics are: race, age, gender reassignment, pregnancy and maternity, disability, sexual orientation, religion or belief, sex, marriage and civil partnership.
50. The purpose of the Southwark Plan 2022 is to facilitate development growth in the borough and deliver the vision of the principles and values in the Borough Plan, ensuring that community impacts are taken into account. The Southwark Plan 2022 is supported by an Equalities Impact Assessment (updated June 2021) which was taken into account in the Examination in Public as part of the supporting documentation to the plan.

Health impact statement

51. The purpose of the Southwark Plan 2022 is to facilitate development growth in the borough and deliver the vision of the principles and values in the Borough Plan, ensuring that health impacts are taken into account. Strategic Policy SP5 (healthy active lives) sets out how we will seek to maintain and improve the

health of our residents, encouraging healthy lives by tackling causes of ill health and inequalities. This will be achieved through the policies in the Plan, including Policy P44 (healthy developments) which sets out the requirements for developments to encourage healthy lifestyle choices.

52. The Southwark Plan 2022 is supported by an Equalities Impact Assessment (updated June 2021) which was taken into account in the Examination in Public as part of the supporting documentation to the plan. This sets out potential health impacts, both positive and negative, of the policies of the Plan.

Climate change implications

53. The Net Zero Carbon target for this Plan as set out in the Climate Change Act (2008). The Council has declared a Climate Emergency with the ambition to reach carbon neutrality by 2030. This Plan is a stepping stone towards meeting this 2030 carbon neutrality target. There is a climate change thread running throughout the Plan to mitigate against and adapt to address climate change. The Southwark Plan 2022 requires the reduction of emissions onsite by 100% on 2013 Building Regulations for major residential developments, and 40% for major non-residential. There will be an early review of the Plan to set out greater requirements for climate change mitigation and adaptation, including on site carbon reduction performance targets for small sites, exploration of embodied and whole lifecycle carbon, review of the heating and cooling and heat and energy sources onsite and reuse and retrofitting. The implementation of this Plan to deliver greater carbon reductions will be supported by upskilling officers and provision of guidance to deliver more sustainable development.

Financial Implications

54. There are no immediate resource implications arising from this report.

SUPPLEMENTARY ADVICE FROM OTHER OFFICERS

Director of Law and Governance (MF/11/21)

55. As explained in the Background section to this report, the Southwark Plan 2022 is a statutory planning document and the Council must therefore have regard to the statutory framework for local plans set out in the Planning and Compulsory Purchase Act 2004 ('the Act') and the Town and Country Planning (Local Planning) (England) Regulations 2012 made under the Act.
56. In accordance with Section 20(5) of the Act the Inspectors have now issued their report following the conclusion of the independent examination held this year. The Inspectors have concluded that, subject to the inclusion of the Main Modifications included in *this* report at Appendix C, the Southwark Plan 2022 meets the legal requirements prescribed in Section 20(5) including that it is in general conformity with the London Plan and is sound and that the Council has fulfilled its duty to co-operate in relation to preparation of the Plan (Section 33A

of the Act). The Southwark Plan 2022 is therefore now capable of adoption by the Council.

57. Part 3C of the Constitution states that matters reserved to full Cabinet include *'Approval for recommendation to council assembly of those proposals and plans contained in the council's budget and policy framework'*
58. Part 3A of the Constitution reserves the agreement of the policy framework, including development plan documents, to Council Assembly. If Cabinet is minded to adopt the recommendations in this report then a report will be brought to Council Assembly recommending adoption of the Southwark Plan 2022 and rescission of the development plan documents which will be superseded on adoption of the new Plan.
59. Cabinet members are asked to note paragraphs 41 to 43 of this report concerning the weight that can now be attributed to the Southwark Plan 2022 prior to formal adoption by Council Assembly. Paragraph 48 of the National Planning Policy Framework provides that local planning authorities may give weight to relevant policies in emerging plans according to the stage of preparation and the more advanced the preparation, the greater the weight that may be given. Now that the Southwark Plan 2022 is capable of adoption by the Council, the policies may be accorded substantial weight whilst formal adoption by Council Assembly is awaited.

Strategic Director of Finance and Governance (CE21/057)

60. This report is requesting that Cabinet agrees the Southwark Plan 2022 at Appendix A for adoption by Council Assembly and agrees the rescission of the Southwark Plan 2007, the Core Strategy 2011, the Aylesbury Area Action Plan (2010), the Peckham and Nunhead Area Action Plan (2014) and the Canada Water Area Action Plan (2015) by Council Assembly upon adoption of the Southwark Plan 2022 by Council Assembly and notes other recommendations of the report.
61. The strategic director of finance and governance notes that there are no new immediate financial implications arising from this report.
62. The strategic director of finance and governance expects that financial appraisals will be carried out as any new plans are developed and will be subject to future reports, including identifying the revenue or capital resources for any new commitments.
63. Staffing and any other costs connected with this report to be contained within existing departmental revenue budgets.

APPENDICES

Appendices	Title
Appendix A	Southwark Plan 2022 for adoption
Appendix B	Inspector's Report to the New Southwark Plan
Appendix C	Main Modifications to the New Southwark Plan (and appendices)
Appendix D	Consultation Report on the Main Modifications
Appendix E	Integrated Impact Assessment
Appendix F	Equalities Impact Assessment
Appendix G	Habitats Regulation Assessment
Appendices available online at	<p>Link (please copy and paste into browser): https://www.southwark.gov.uk/planning-and-building-control/planning-policy-and-transport-policy/new-southwark-plan?chapter=10</p>

BACKGROUND DOCUMENTS

Background Papers	Held At	Contact
New Southwark Plan Examination Hearings	These can be viewed on the Council's YouTube page	planningpolicy@southwark.gov.uk
New Southwark Plan Examination webpage including all relevant documentation	Link (please copy and paste into browser): https://www.southwark.gov.uk/planning-and-building-control/planning-policy-and-transport-policy/new-southwark-plan	planningpolicy@southwark.gov.uk
National Planning Policy Framework	Link (please copy and paste into browser): https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/1005759/NPPF_July_2021.pdf	planningpolicy@southwark.gov.uk

AUDIT TRAIL

Cabinet Member	Councillor Helen Dennis, Climate Emergency and Sustainable Development	
Lead Officer	Juliet Seymour, Head of Policy, Building Control and the Historic Environment	
Report Author	Laura Hills, Planning Policy and Monitoring Innovation Manager	
Version	Final	
Dated	26 November 2021	
Key Decision?	Yes	
CONSULTATION WITH OTHER OFFICERS / DIRECTORATES / CABINET MEMBER		
Officer Title	Comments Sought	Comments Included
Director of Law and Governance	Yes	Yes
Strategic Director of Finance and Governance	Yes	Yes
Cabinet Member	Yes	Yes
Date final report sent to Constitutional Team		29 November 2021

Item No. 13.	Classification Open	Date: 7 December 2021	Meeting Name: Cabinet
Report title:		Housing Revenue Account – Indicative Rent Setting and Budget Report 2022-23	
Ward(s) or groups affected:		All	
Cabinet Members:		Councillor Rebecca Lury, Finance, Performance and Democracy and Councillor Stephanie Cryan, Council Homes and Homelessness	

FOREWORD – COUNCILLOR REBECCA LURY, CABINET MEMBER FOR FINANCE, PERFORMANCE AND DEMOCRACY, AND COUNCILLOR STEPHANIE CRYAN, CABINET MEMBER FOR COUNCIL HOMES AND HOMELESSNESS

We are proud to maintain and manage the Council’s 55,000 rented, leasehold and freehold homes across the Borough.

The money we use to do this sits within our Housing Revenue Account (HRA) which is made up of rents and service charges paid by tenants and homeowners and used to fund all the activity needed to ensure our homes and estates are well run and in good condition.

This report sets out an indicative budget for next year’s HRA (2022-23) so we can seek tenant and homeowner views on it before a final budget is agreed. The report also considers what the appropriate charges should be for a variety of housing services. The final budget will be taken to cabinet in January 2022.

The Covid-19 pandemic continues to have huge ramifications for our tenants and homeowners. This will continue to impact on our budget. Whilst we are starting to return to business as usual we are working through backlogs in our repairs service and our delivery of new kitchens and bathrooms as part of our Quality Homes Investment Programme. We also see additional pressures with the increasing costs associated with helping those who find themselves homeless.

The Building Safety Bill is currently being debated in Parliament and the requirements on Southwark as one of the largest landlords of social housing in the UK and of the highest number of high rise blocks in England will bring additional pressures onto the HRA. We have also recently agreed our Heat Networks Strategy to update and decarbonise the 17,000 homes on our district heating networks.

We will be consulting on these proposals with our residents before the final budget is presented in January.

Whilst we continue to see greater demands on the HRA we are pleased to recommend this budget to cabinet.

RECOMMENDATIONS

1. Cabinet notes on a provisional basis a rent increase of 4.1% for all directly and tenant managed (TMO) housing stock within the HRA (including estate voids, sheltered housing and any residual hostels), with effect from 4 April 2022. This is the maximum permitted under the Rent Standard 2020.
2. With regard to other HRA-wide charges, cabinet notes on a provisional basis the changes to tenant service charges, comprising estate cleaning, grounds maintenance, communal lighting and door entry system maintenance as set out in paragraphs 24 – 25 with effect from 4 April 2022.
3. Cabinet notes on a provisional basis the proposed changes to sheltered housing service charges as set out in paragraphs 26 – 28 with effect from 4 April 2022.
4. Cabinet notes on a provisional basis the changes to charges for garages and other non-residential facilities as set out in paragraphs 29 – 30 with effect from 4 April 2022.
5. Cabinet notes on a provisional basis the proposed increase to district heating and hot water charges as set out in paragraphs 31 – 38 with effect from 4 April 2022.
6. Cabinet reaffirms its commitment to ensure that savings proposals are primarily based on efficiencies, and where staffing reductions form part of any savings proposal, that due consultation and process is followed with trade unions.
7. Cabinet instructs officers to provide a final report on Rent Setting and the HRA Budget for 2022-23 after due consultation processes with residents have been followed, for consideration at their meeting on 18 January 2022.

BACKGROUND INFORMATION

Statutory framework

8. The Housing Revenue Account (HRA) reflects the statutory requirement under Section 74 of the Local Government and Housing Act 1989 to account separately for local authority housing provision. It is a ring-fenced account, containing solely the costs arising from the provision and management of the council's housing stock, offset by tenant rents and service charges, homeowner service charges and other income. The council has a statutory responsibility to set a balanced HRA budget.
9. The Welfare Reform and Work Act 2016 compelled councils and housing associations to reduce rents by 1% each year for the financial years 2016-17 to 2019-20. In October 2017 MHCLG announced that national rent policy would revert to CPI+1% for a period of five years from 2020-21 to 2024-25.

This was followed by a rent policy statement from government reaffirming that in September 2018.

10. In February 2019, following consultation, the government issued a direction on the Rent Standard from 1 April 2020 to the Regulator of Social Housing. The Regulator is required to take into account the government commitment to a five-year settlement of rent increases up to September CPI+1%. This direction also for the first time brought local authority registered providers within the scope of the Regulator's Rent Standard.

KEY ISSUES FOR CONSIDERATION

Impact of the national rent reduction policy

11. Southwark has a history of low or inflation-linked rent rises, and has always adhered to the government's rent formula when setting rents, with the single exception to agree a lower rent increase in 2014-15, equivalent to CPI for that year, as the implied national increase was considered to be too high. Southwark's rents remain over 8% lower than the government's assumed target, though the effect of the "straight-to-target" policy, coupled with the requirement of the Rent Standard 2020 that all new lets be at target rent will reduce this gap over an extended period of time. Council rents remain around the lower quartile of the 29 London Boroughs with retained housing stock.

HRA budget background

12. Whilst the funding regimes for the HRA and the council's general fund are different, the budget principles are aligned, whereas the timeline for setting rents is abridged such that notification of changes in rents and charges can be served in line with the statutory deadline 28 days in advance of the rent increase becoming effective.
13. Budget review and validation is unremitting and endeavours to identify savings through service rationalisation and more efficient working practices, with particular focus on back-office and departmental/corporate overheads in order to prioritise resources to where they are most needed and deliver the council's policy objectives. This has been particularly difficult within the constraints of a national rent reduction policy and welfare benefit reforms, along with inflationary and contract cost pressures and unavoidable commitments arising from exceptional events such as Grenfell and latterly Covid-19. The table below illustrates the extent of these pressures since 2012 when the HRA became self-financing and wholly reliant on its own resources.

	Types of Expenditure		Types of Income			
	General inflation	Commitments	Rent and charges	Homeowners charges	Fees and charges	Savings
	£'000	£'000	£'000	£'000	£'000	£'000
2011-12	1,600	19,784	(12,143)	–	–	(9,241)
2012-13	1,400	16,695	(15,298)	3,900	(300)	(6,397)
2013-14	1,978	15,663	(11,614)	–	5	(6,032)
2014-15	2,805	11,349	(2,738)	(4,970)	(553)	(5,893)
2015-16	2,384	11,826	(3,348)	(5,000)	(400)	(5,462)
2016-17	2,446	9,242	77	(1,036)	(402)	(10,327)
2017-18	1,938	3,246	2,192	(219)	(211)	(6,946)
2018-19	1,660	(4,734)	1,171	4,870	(279)	(2,688)
2019-20	2,447	2,363	421	(200)	(478)	(4,553)
2020-21	2,570	9,595	(5,344)	(1,000)	(923)	(4,898)
2021-22	2,020	7,705	(3,137)	(1,500)	(180)	(4,908)
Total	23,248	102,734	(49,761)	(5,155)	(3,721)	(67,345)
Total Expenditure			Total Income			
	125,982					(125,982)

Budget framework and key issues for 2022-23

14. The budget framework for next year remains substantially the same as in previous years with the focus being on finding further savings through efficiencies and directing greater resources (both new and existing), to areas of highest priority in order to support and enhance the provision of housing services to residents. The worst effects of the pandemic are hopefully behind us from a budgetary standpoint, and whilst there is still uncertainty, service provision is largely back on track and staff are working hard to recover lost ground in terms of repairs and capital works projects that stalled during the pandemic. Income recovery procedures that were suspended to assist residents during this challenging period, have now resumed but not unexpectedly, arrears have been adversely impacted. However, the position is showing improvement and the expectation remains that this trend will continue but will take time to normalise to pre-pandemic levels. Similarly, for HRA commercial properties and garages which saw a downturn in lettings activity, but are showing signs of recovery but are not expected to provide any real income growth for 2022-23, other than increased charge rates for garages. Consequently, it is again anticipated that budget provisions set-aside for bad debts will be fully utilised in-year thereby minimising any scope to off-set pressures elsewhere within the HRA.
15. One of the most enduring budget pressures is the repair and maintenance of the housing stock, which consumes the greatest proportion of operational resources, requiring stringent management of high value/high volume contract budgets. The successful implementation of the housing repairs improvement plan is key to improving the performance and financial viability of the

Southwark Repairs service going forward and further resources of £1m are being committed as part of this budget round, negating any savings previously assumed through performance and productivity gains which are being deferred to 2023-24. In addition, further resources of £1.4m are being earmarked within Asset Management for district heating, disrepair and leaks from above.

16. The onerous responsibilities conferred by the Building Safety Bill and Fire Safety Act 2021 on local authorities and private sector landlords represents a seismic endeavour and requires significant financial commitment given the unique size and nature of the council's housing stock. Southwark has 170 in-scope high-rise buildings (the highest number in the country) which are the immediate priority, along with a significant number of buildings that require further surveys, but which are considered to be of low or moderate risk outside the scope of the legislation. Notwithstanding the critical importance of these new duties to augment residents' safety, they create a substantial additional financial pressure on already constrained resources, particularly capital, both for the initial surveying programme, but moreover the cost of remediation works arising, which is an unknown, but potentially significant. For 2022-23 new revenue and capital funding commitments totalling £7.1m are included in the budget proposals to address these needs.
17. In light of these new pressures, the council is currently undertaking a wholesale review of its asset management strategy to subsume these new requirements into its business planning, which is likely to be at the expense of other less-essential programmes over the medium-term. As previously reported, capital resources are under extreme pressure and borrowing to support the QHIP and New Homes programmes continues to rise at an unprecedented rate with a consequent revenue financing impact on the HRA, which cannot be sustained over the long-term. Close monitoring and scrutiny of key budget drivers and performance indicators provide opportunity to realign and rationalise budgets to more closely reflect demand and activity changes and correct any budget anomalies that may have arisen over time. With rent policy constrained to CPI+1%, the reality is that resources will never fully match the needs of the housing stock. This is particularly true for both the HRA and the housing investment programme (HIP), and requires the prioritisation and re-profiling of works programmes in order to achieve best value and ensure long-term financial sustainability.
18. The indicative budget for 2022-23 is predicated on a number of known and anticipated budget pressures/commitments and assumptions around demand/activity changes totalling £13.6m and a rent increase at September 2021 CPI+1% (4.1%) which raises £5.4m net. Other income streams and capitalisation contribute a further £7.0m and budget efficiencies and rationalisation measures delivers £1.2m. These proposals are sufficient to deliver a balanced budget for 2022-23 as required by statute. Appendices A to F set out the indicative revenue budget movements as they relate to 2022-23.

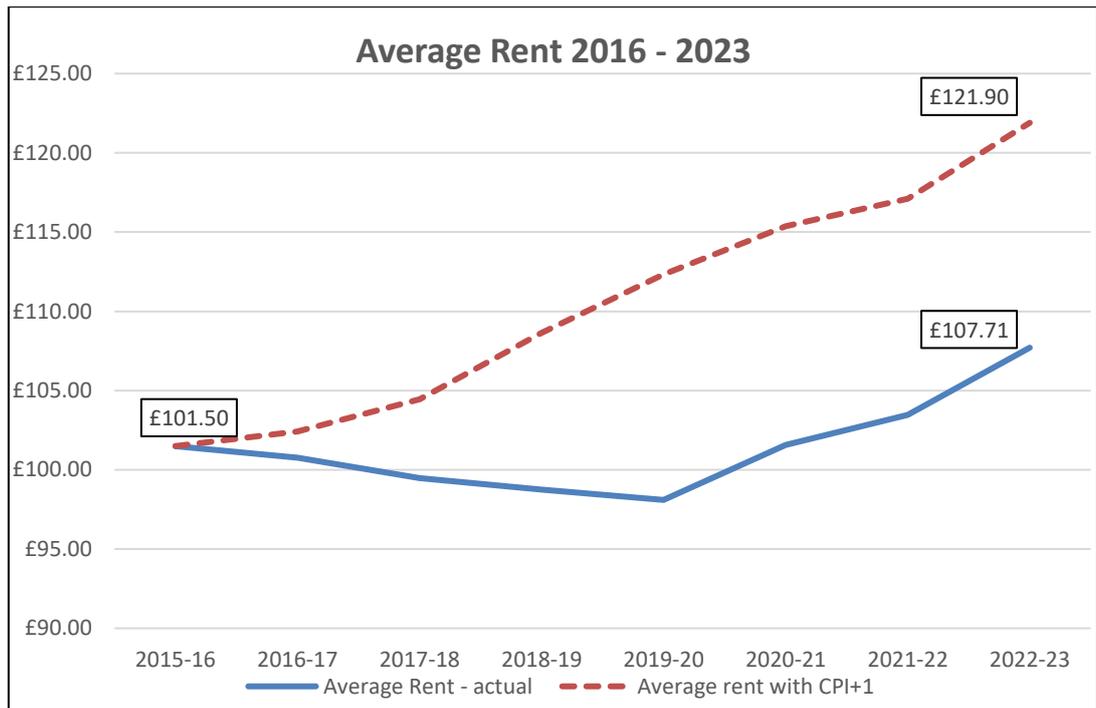
Average rent levels

19. The table below gives the average rent by bedsize for 2021-22 and includes the effects of regeneration and the 'straight-to-target' rent policy for new lets (which became mandatory under the Rent Standard 2020). Uplifting this dataset by the proposed 4.1% increase gives the indicative averages by category for 2022-23.

Bedrooms	Average weekly rent 2021-22	Average weekly rent 2022-23	Increase per week
0	£81.63	£84.98	£3.35
1	£93.63	£97.47	£3.84
2	£103.45	£107.69	£4.24
3	£113.16	£117.80	£4.64
4	£122.29	£127.30	£5.01
5	£134.12	£139.62	£5.50
6+	£147.86	£153.92	£6.06
Overall	£103.47	£107.71	£4.24

Note: figures for 2021-22 are based on the mid-year stock position to ensure greater accuracy.

20. The chart below shows actual average rents for Southwark since the introduction of national rent reductions under the Welfare Reform and Work Act 2016. Over four years, rents were reduced by 1% each year, before reverting to the current government guideline increase of CPI + 1%. The dotted line shows what the average rent would have been had CPI+1% been applicable throughout. It can be seen that inflation in 2020-21 returned average rents roughly to the point they were at when the reduction process commenced four years earlier, a time-lag that remains to the present day – the proposed increase for 2022-23 still only brings average rents back to the level that they would otherwise have been in 2018-19. The gap in 2022-23 between the two lines is the equivalent of £14.19 per week on average.



HRA financing

21. The self-financing settlement assumed that residual debt would be extinguished over the thirty-year life of the business plan. Whilst there is no statutory requirement for a minimum repayment set-aside (unlike the general fund), £55.1m has been repaid since 2012. This would have been higher were it not for the enforced rent reduction which necessitated re-prioritising service delivery over debt repayment. Up until recently, it has not been necessary to borrow additionally to fund the capital programme, but that position is no longer sustainable and borrowing will increase exponentially as the building and fire safety, heat network, high-needs estates and new homes programmes ramp-up. Whilst the relaxation of local authority borrowing controls is welcome and market interest rates are low, it is not a panacea for unfettered borrowing as the revenue financing costs of new debt need to be sustainable over the long-term (thirty to fifty years).

22. Borrowing remains subject to the provisions of the Local Government Act 2003 which requires the local authority to have regard to the Chartered Institute of Public Finance and Accountancy's Prudential Code for Capital Finance in Local Authorities 2011 when determining how much money it can afford to borrow. The objectives of the Prudential Code are to ensure, within a clear framework, that the capital investment plans of local authorities are affordable, prudent and sustainable, and that decisions are taken in accordance with good professional practice. The council's treasury management strategy is regularly reviewed and reported to council assembly twice a year.

HRA reserves

23. In accordance with the Fairer Futures Medium Term Financial Strategy (FFMTFS) and in common with other local authorities and the council's general fund, the HRA holds reserves to manage demand volatility, fulfil future commitments and mitigate budget risk. The level of reserves and working balances at 31 March 2021 stood at £28.3m, up from £23.0m the previous year. This is a continuation of the gradual replenishment of reserves following the downward trajectory experienced in prior years. It should be noted that around 74% is earmarked for specific purposes, with the remainder held as a contingency against exceptional or catastrophic events. Given the size of the HRA and HIP, this is still considered to be below the optimal level required and it remains a priority to build a more prudent reserve position as resources permit.

Tenant service charges

24. Tenant service charges (TSC) originated from the government's rent restructuring regime in 2002-03 with the intention of engendering greater consistency and transparency between local authority and RSL sectors. They were first de-pooled from rents (i.e. rents were reduced by an equivalent amount as the cost of the service charges) in Southwark in 2003-04 and have been rebased on several occasions since.
25. The principle underpinning the calculation of charges is that they are set at a level to recover the estimated cost of providing the service; borough-wide costs are pooled in order to moderate any area cost differentials and divided by the estimated number of service recipients to derive a standard charge. In order to ensure that costs and charges remain aligned, they are now subject to annual rebasing and the existing and proposed rates are set out below. Crucially they remain eligible for welfare benefit support.

Tenant service charges	2021-22	2022-23	Change
	£ per week	£ per week	£ per week
Estate Cleaning	6.13	6.32	19p
Grounds Maintenance	1.42	1.45	3p
Communal Lighting	1.46	1.81	35p
Door Entry	0.66	0.71	5p
Total	9.67	10.29	62p

Sheltered housing service charges

26. Sheltered housing service charges were first implemented in 2013-14 and reflect the cost of enhanced housing management services provided to residents. Whilst core service provision had largely remained unaltered over the period, charge rates had not kept pace with costs. Following a rebasing exercise during the last financial year, charge rates were proposed to increase markedly to fully reflect the cost of provision. However, in order to mitigate potential hardship for clients, cabinet resolved to cap the charge for 2021-22 at £33.20 per week (as opposed to £34.69 per week).
27. The cap was also partly intended to retain a phasing element of the move towards full cost recovery, and last year's cabinet reports indicated that its impact in terms of the likely level for 2022-23 would result in a weekly charge of £35.38. Updated inflationary pressures on these costs means that the actual recommended amount is slightly less than this original figure, at £34.75. The originally anticipated additional income of £76k in 2022-23 will therefore be slightly lower, at £54k.
28. Service charges like rents are eligible for welfare benefits and currently around 80% of all residents are in receipt of full or partial support or receive transitional funding from Adult Social Care, a long-standing agreement emanating from the Supporting People funding regime, which is gradually falling out as residents leave sheltered care.

Garages and non-residential charges

29. Garage are a valuable asset within the HRA and provide an income stream that helps maintain service provision. Charges are determined by reference to inner London quartile rates, demand and stock availability. A limited programme of renewal and refurbishment to bring obsolete garages back into use continues, but this is likely to slow or cease as resources become more constrained and policy priorities for garage sites shift towards the provision of new homes and where appropriate and financially viable, more affordable business/creative work space.
30. Following a review of the garage portfolio and charging regime it is recommended that standard charges for council residents (secure tenants, resident leaseholders/ freeholders) are increased by 3.1%; and by for 5% for

private sector renters. The resultant charges are set out in the table below and are estimated to generate additional income of around £222k.

Garage charges	2021-22 £ per week	2022-23 £ per week	Increase (%)	Change £ per week
Standard charge	21.75	22.40	2.99%	0.65
Concessionary rate (£5 reduction)	16.75	17.40	3.88%	0.65
Small sites rate	11.50	12.00	4.35%	0.50
Private sector rate	37.30	39.20	5.09%	1.90
Additional charges:				
Larger than average garage	5.40	5.60	3.70%	0.20
Additional parking	5.40	5.60	3.70%	0.20
Water supply	0.50	0.50	–	–
Additional security	1.00	1.00	–	–

Note: the private sector charge is inclusive of VAT at the standard rate.

District heating charges

31. The council's procurement strategy for the purchase of gas and electricity for the district heating network is provided through the LASER purchasing consortium that has over a sustained period delivered very competitive utility prices, primarily gas. This contract was renewed in September 2020 to cover the period to March 2025. This has enabled pooled charges to tenants to be maintained at the same level for a number of years and on average, these are lower than retail market rates. However, notwithstanding the advantage of this arrangement, utility prices remain subject to market fluctuations over which the council has no control.
32. The council's pooled charging policy for district heating and hot water commenced in 1995 with the establishment of the district heating account, with the purpose to smooth-out the impact of price fluctuations over an extended period, mitigate any deficit periods and minimise the requirement for frequent charge movements. In terms of future developments, cabinet agreed a wide-ranging report on the heat networks strategy and associated statutory requirements on 14 September 2021. Officers will come back during 2022 with worked-up proposals around implementation, including billing implications.
33. Review takes place annually as part of HRA budget setting to align the anticipated cost and income for the forthcoming year, taking into account price and consumption, adverse weather and changes in the recoverable tenanted stock base. Energy costs are pooled and standardised 'fuel only' charges set on a borough-wide basis for tenants, depending on the number of bedrooms and type of heating installation. This ensures equilibrium between tenants across the piece regardless of the age and condition of the heating system to which they are connected. On-going investment in energy efficiency measures

to reduce consumption also contributes to the financial stability of the heating account. For tenants, the cost of repairs and maintenance is integral in their rent.

34. For homeowners connected to the district heating network, the situation is different as under the terms of the lease they become liable for the actual energy costs incurred and will experience fluctuations in their charges year to year. In addition, and in line with other communal services, they are liable for a proportion of the actual cost of repairs and maintenance to the heating system in the block/estate in which they reside.
35. The Laser framework means that council requirements for gas and electricity are pooled with around 100 or so other local authorities, police etc. which enables other local authorities and public sector bodies to access the wholesale markets directly. They can purchase energy requirements up to four years in advance at any time, so this helps smooth any sudden spikes in the market. Having said that, this is of course an unprecedented time in the energy markets and so price rises are inevitable with the wholesale market rising by around 300% this year. Housing estates are currently paying around 1.8ppkWh plus standing charges, whereas the wholesale market currently sits at around 6ppkWh, with residential customers being offered around 8ppkWh by suppliers.

36. The majority of gas on Southwark estates (around 70%) is used between October and March, meaning any April price increases will be for the summer portion of gas. This gives us some certainty with regard to the in-year costs for the remainder of 2021-22. The expectation is that the market will settle down again before next winter's buying period, and Laser will continue to monitor the markets and purchase at strategic points to ensure the best possible value. It should be stressed, that even with price volatility, the consortium continues to ensure that the council pays an extremely attractive price for the energy supplies under this contract and we are not as exposed as other consumers to the adverse market conditions. The proposed 2022-23 increase is intended to manage short-term exposure to the exceptional market volatility currently being experienced with a capped increase in district heating charges to match the rent increase at 4.1%. This should allow time for markets to stabilise, but clearly there can be no guarantee and in the event that costs remain above the budgeted income level, then the heating account reserve will be used to mitigate the short-term impact, and further consideration of charge rates may be necessary during 2022-23.
37. The Office of Gas and Energy Markets (Ofgem) is currently consulting on the potential impact of increased wholesale price volatility on their default tariff cap, and the increase proposed by the council is mindful of this on-going process. Ofgem have had the legal power to design and enforce the cap since 2018, but recognise that current circumstances demand reconsideration as to how it reflects the costs, risks and uncertainties that energy suppliers face. The cap has already been increased by c.12% earlier this year (August 2021, effective from October).

38. The current and proposed weekly charges for district heating are set out in the table below.

	Bedrooms	2021-22 £ per week	2022-23 £ per week
Central Heating and Hot Water	0	8.61	8.96
	1	12.09	12.59
	2	14.97	15.58
	3	17.92	18.65
	4+	19.34	20.13
Weatherfoil Heating and Hot Water	0	7.25	7.55
	1	10.40	10.83
	2	12.99	13.52
	3	15.54	16.18
	4+	16.85	17.54
Weatherfoil Heating only	0	5.47	5.69
	1	6.78	7.06
	2	8.17	8.50
	3	9.53	9.92
	4+	10.89	11.34
Central Heating only	0	6.73	7.01
	1	8.46	8.81
	2	10.15	10.57
	4+	12.70	13.22
Hot Water only	1	2.30	2.39
	2	4.85	5.05
	3	6.00	6.25
LRB Heating	0	5.84	6.08
	1	8.71	9.07
	2	9.43	9.82
	3	10.18	10.60
Partial Heating	0	4.58	4.77
	1	5.62	5.85
Underfloor Heating	0	6.87	7.15
	1	7.62	7.93
	2	8.38	8.72
	3	9.13	9.50

Other income streams

39. Whilst tenant rents and service charges constitute over three-quarters of HRA income; the remainder comprise homeowner service charges, commercial property rents, interest receivable, recharges, costs recovered, capitalised expenditure and discretionary and mandatory fees and charges.
40. Homeowner revenue service charges are the second-largest income stream to the HRA and represent the actual cost of services provided to homeowners that are fully recoverable under the terms of the lease. Whilst right-to-buy activity remains low, price and volume increases across a range of recoverable services are forecast; the base budget needs to be realigned for 2022-23 to reflect this. Overall this is net neutral to the HRA. Capital works service charges are determined by the scale and delivery of investment in the stock and the extent to which it pertains to leasehold property (external and communal works). The base budget is based on a relatively prudent expectation of income in order to avoid frequent budgetary fluctuations due to the variable nature of the works programme, and given the delays arising from the pandemic in the current year, there is no realistic expectation of budget growth in this area for 2022-23.
41. The economic impact of the pandemic has also been felt in terms of the council's commercial property portfolio, in common with the private sector in this regard, and in acknowledgement of this there is no additional income from this source factored into the HRA budget for 2022-23. A modest increase in income derived from miscellaneous fees and charges has been budgeted for, in line with the provisions of the council's Medium-Term Financial Strategy, which covers both the HRA and General Fund services.
42. As noted in the section above on financing, the HRA will have an additional commitment relating to building safety surveys from 2022-23 onward. It is proposed to fund the immediate costs of this through capitalising the cost via the investment programme.

Consultation and statutory/contractual notification requirements

43. Unlike matters of direct housing management there is no statutory requirement to consult on rent and other charges; however the council remains committed to engaging with residents under the terms of the Tenancy Agreement. Specific consultation normally commences with this interim scene-setting report to cabinet in December setting out the indicative budget and implications for rents and other charges in order that information can be disseminated to residents before Christmas.
44. Following extensive consultation the council adopted the new Resident Participation Framework in 2020, reforming its consultative bodies and procedures, with the intention that HRA budget and rent setting consultation for 2021-22 be conducted in line with the new arrangements. Homeowner representatives are unable to make recommendations in the matter of tenant

rents and service charges, but may do so in respect of proposals regarding garage charges and in terms of any budget proposals pertinent to the calculation of their service charges.

45. The effect of the global pandemic had a far-reaching impact, not least on the ability of the council to conduct consultations such as the one required for the HRA budget and rent setting last year. In the event, a one-off webinar was held on 15 December 2020 focusing exclusively on HRA rent setting consultation. Invitations were sent to all TRA's, SGTO and all online panel members and participants who had previously attended local housing forums. People who wished to take part but not able to make the webinar itself were able to register their interest and sent links to the recording of the session and also to the on-line response/polling arrangements.
46. Officers are currently actively considering the most effective approach for 2022-23 consultation. The results of the consultation process will be collated and reported to cabinet for their consideration early in the new year. Subsequent to the approval of the final report, either as set out or as amended by cabinet, and the passing of the necessary date for its implementation, the council will issue the statutory and contractual notification of variation in rents and other charges to all tenants, not less than 28 days prior to the effective date of 4 April 2022 for commencement of the new rent year.

Community, equalities (including socio-economic) and health impacts

Community impact statement

47. The purpose of this report is specifically to set tenant rents and associated charges (which can also impact homeowners), and set a balanced budget as required by statute. Analysis has established there is no differential effect for any community or protected group. From 2020-21 the intention of central government is that rents should increase by up to CPI+1% under the provisions of the Rent Standard 2020. It is recognised that any increase may present particular difficulties for people on low incomes. However, rents and tenant service charges remain eligible for housing benefit/universal credit.
48. The wider impact of welfare reform changes has been considered and measures to mitigate the effects on the community have been implemented together with the provision of additional resources to support tenancy sustainment and financial assistance through the provision of Discretionary Housing Payments (DHP). For 2021-22 the allocation was £1.15m. The provision of further support is subject to annual confirmation from central government, but is expected to be of the same order and to provide support for tenants affected by the "bedroom tax" and "benefit cap" for example.
49. There are existing financial support streams, including the existing hardship fund, the newer and more substantial vulnerable renters fund (£1.1m), and the recently announced household support fund (£2.7m) that will provide exceptional support this winter in recognition of the unprecedented impacts of the pandemic. The former will provide extra help for vulnerable individuals at

risk of losing their home. The latter will help vulnerable, low-income households with the cost of food, fuel, and other essentials this winter (November 2021 – March 2022). The council has decided that help for low-income households affected by the end of the universal credit uplift and changes to the statutory energy price cap will be a priority. Eligible households will be identified from benefit data held by the council, or by referral from community partners. Additional support will be provided for families of children attending Southwark schools and receiving free school meals.

50. The council established a residents working party during 2021 in order to examine the effects of the pandemic on (amongst other things) rent arrears and benefits take-up. The review has made draft recommendations aimed at supporting and enhancing the current approach, and the council is now considering the most effective means of implementation.

Equalities (including socio-economic) impact statement

51. In line with our Public Sector Equality Duty contained within section 149 of the Equality Act 2010, the department undertakes equality analysis/screening on its budget proposals, which helps to understand the potential effects that the proposals may have on different groups and whether there may be unintended consequences and in the event, how such issues can be mitigated. Analysis is also undertaken to consider any cross-cutting and council-wide impacts. To date no cumulative impacts have been identified.
52. Information on the equality analysis is shared with cabinet to enable it to be considered when decisions are taken. Changes to services will be implemented in such a way to not impact disproportionately on any specific section or group in our community or staff cohort, and where necessary, consultation will be undertaken alongside mitigating action.

Health impact statement

53. The council is committed as part of the Fairer Futures – Homes for All theme, to maintaining the highest standards so that all our homes are clean, safe and cared for. Proposals within this budget contribute directly to continuing our long-term homebuilding programme and also investing in and improving our estates, which will contribute to providing health benefits for Southwark residents.
54. There is an established link between financial concerns being a driver/cause of poor mental health. The council recognises this issue, and strives to support tenants and homeowners by retaining and encouraging a focus on tenancy sustainability. Housing officers provide practical advice and help to tenants, whilst the statutory rent letter mail-out, amongst other communications, normally contains additional advice on benefits. During the pandemic, the council also suspended interventionist policies with regard to arrears recovery and eviction procedures in order to recognise the additional pressures both financially and mentally that the situation had placed on Southwark's residents.

Climate change implications

55. At its meeting of 7 July 2021 cabinet adopted Southwark's formal climate change strategy, and for a number of years the council has been committed to achieving carbon neutrality by 2030. The reports under consideration today and post-consultation are principally concerned with the financing and delivery of the council's responsibilities as a social landlord, so it is not proposed to reproduce the entire strategy here. However, Section E of the Action Plan on **Priority 1 – Greener Buildings** within the strategy relates directly to the council's dwelling stock, and that table is set out below.

Theme	Goal	Progress	Immediate Actions
E. Decarbonise council housing	1. Raise the energy efficiency of social housing with an EPC rating of D or lower	Improvements already underway including replacing gas burning boilers on the Wyndham, Consort and Newington estates with modern water source heat pumps.	Prioritise energy efficiency improvements and maximise funding for the worst-performing social housing properties i.e., those with EPC rating D or lower.
	2. Replacing gas with low carbon-technologies	The Tustin estate has seen new insulated roofs and double-glazed windows installed to the three tower blocks, significantly improving their energy efficiency.	Increase the number of council-owned homes to the extended SELCHP network where feasible.
		Ann Moss Way	

Theme	Goal	Progress	Immediate Actions
		development is an on-going pilot project to investigate whether carbon neutral council homes can be developed to Passivhaus standard and the cost of doing so.	Work with residents to develop decarbonisation plans for every estate in the borough.

56. To cite two specific examples in this area: cabinet considered two reports from the Strategic Director of Housing and Modernisation in September 2021, both of which have a direct relationship with the climate change strategy and the action plan above. Firstly, the refreshed asset management strategy, which addressed this directly and also contained a dedicated appendix on the matter. An extract from the main undertaking within the appendix is worth restating here:

“The proposal from Asset Management commits the Division to exploring measures to reduce carbon emissions relating to Southwark’s housing stock, including improved insulation, solar installations, and intelligent lighting systems, as well as the decarbonisation of the borough’s district heating network. The proposal makes clear that significant resident consultation and engagement will be carried out prior to the presentation of the full strategy to Southwark’s Cabinet in June 2022, to ensure that community-led decision making is at the heart of investment to make Southwark’s homes safer, secure, greener and places to be proud of.”

57. Secondly, the report on the heat networks strategy also spoke extensively to this area, both in terms of the anticipated reduction in carbon emissions that the new network would facilitate, and with regard to additional thermal energy efficiency measures to ameliorate potential upward charging pressures.

SUPPLEMENTARY ADVICE FROM OTHER OFFICERS

Director of Law and Governance

58. The report sets out an Indicative Budget for the Housing Revenue Account (HRA) for 2022-23. Members are invited to approve officer recommendations for:
- Rent increases for existing directly managed and TMO managed tenancies by 4.1%;
 - An increase in tenant service charges, with two options set out for consultation;
 - A phased increase in sheltered housing service charges;
 - A 3.1% or 5.0% increase in charges for garages and other non-residential facilities dependent on the status of the customer; and
 - An increase in district heating and hot water charges of 4.1%.
59. The financial and budgetary considerations underpinning the recommendations are explained in the body of the report and its annexes.

Policy and legislative context

60. The Local Government and Housing Act 1989 (“the 1989 Act”) sets out legal requirements in relation to housing finance, in particular a duty under Section 74 of the Act to maintain a Housing Revenue Account (“HRA”). The 1989 Act provisions include a duty, under Section 76 to budget to prevent a debit balance on the HRA and to implement and review the budget.
61. The Housing Act 1985 (“the 1985 Act”) section 24 gives the council power to “*make such reasonable charges as [it] may determine for the tenancy or occupation of [its] houses*”. The council is additionally required by Section 24 of the 1985 Act, from time to time, to review rents and make such changes as circumstances may require.
62. Up to 1 April 2020 the discretion as to rents and charges was subject to restrictions arising from the provisions of the Welfare Reform and Work Act 2016 (‘the 2016 Act’). The Act and supporting regulations required the council to ensure (subject to limited exceptions) that for each relevant year the rents (excluding charges made for services) payable by its social tenants reduced by at least 1% year on year from a 2015-16 baseline, for a period of four years .

The Act also made provision, for a period of four years commencing 2016, for the maximum levels of rent for social tenancies commencing after 8 July 2015; these provisions applied to tenancies of new homes and re-lets to a new tenant, but not the grant of a new tenancy to an existing tenant.

63. Following consultation by the Ministry of Communities, Housing and Local Government with Registered Providers and Local Authorities, from 1 April 2020 the council must set rents in accordance with the Rent Standard April 2020 (“the 2020 Standard”). This is issued by the Regulator of Social Housing under direction (the Rent Standard Direction 2019) of the Secretary of State for Housing, Communities and Local Government pursuant to powers given under the Housing and Regeneration Act 2008 Section 197. Government policy in this respect is set out in the “Policy Statement of Rents for Social Housing”.
64. Under the 2020 Standard the council may apply annual rent increases, over a five-year period, of up to 1% above the general index of consumer prices; CPI. The 2020 Standard sets out the formula to be applied. The council may set rents as recommended in the report provided the council has met its rent reduction obligations over the previous four years.
65. The council must comply with the rules contained in the 2020 Standard; Housing and Regeneration Act 2008 section 194(2A). There is additionally a requirement to provide information to the Regulator of Social Housing when required and a duty to report non-compliance or potential non-compliance.

Consultation

66. Changes in Rent and other charges are excluded from the statutory consultation requirements on matters of “housing management” in respect of which local authorities are required to consult their tenants secure, introductory and demoted tenants pursuant to Section 105 of the Housing Act 1985 and Sections 137 and 143A of the Housing Act 1996. The Council however has undertaken in its tenancy conditions to consult with the Tenant Council before seeking to change rent and other charges. The report indicates that consultation will take place in order to comply with this term.
67. The council is required, by Section 103 of the Housing Act 1985 in relation to its secure tenancies by Section 111A of the Housing Act 1985 in respect of its introductory tenancies and further to the council’s agreement with its tenants, to notify tenants of variations of rent and other charges. The council will need to serve a notice of variation, at least 28 days before the variation takes effect.

Equalities impact

68. In making a decision the cabinet must have due regard to the council’s equalities duties set out in the Equalities Act 2010, specifically the need to:
 - Eliminate discrimination, harassment, victimisation or other prohibited conduct;

- Advance quality of opportunity between persons who share a relevant protected characteristic and those who do not; and
- Foster good relationships between those who share relevant characteristics and those who do not.

69. The report includes a community impact statement which sets out consideration given to the equality duties in the Equality Act.

BACKGROUND DOCUMENTS

Background Papers	Held At	Contact
Link (please copy and paste into browser): https://moderngov.southwark.gov.uk/documents/s86580/Report%20Approval%20of%20the%20Housing%20Revenue%20Account%202020-21%20and%20rent%20setting.pdf	160 Tooley Street London SE1 2QH	Paula Thornton, Constitutional Team

APPENDICES

No.	Title
Appendix A	Summary of HRA Budget Movements 2022-23
Appendix B	HRA Summary Revised 2021-22 and Indicative Budget 2022-23
Appendix C	HRA Inflation, Budget Pressures and Commitments 2022-23
Appendix D	HRA Income Generation 2022-23
Appendix E	HRA Efficiencies and Improved Use of Resources 2022-23
Appendix F	HRA Subjective Indicative Budget 2022-23

AUDIT TRAIL

Cabinet Members	Councillor Rebecca Lury, Finance, Performance and Democracy and Councillor Stephanie Cryan, Council Homes and Homelessness	
Lead Officers	Duncan Whitfield, Strategic Director of Finance and Governance Michael Scorer, Strategic Director of Housing and Modernisation	
Report Author	Ian Young, Interim Director of Finance and Departmental Finance Manager, Housing and Modernisation	
Version	Final	
Dated	29 November 2021	
Key Decision?	Yes	
CONSULTATION WITH OTHER OFFICERS/DIRECTORATES/CABINET MEMBER		
Officer Title	Comments Sought	Comments included
Director of Law and Governance	Yes	Yes
Strategic Director of Finance and Governance	N/a	N/a
Date final report sent to Constitutional Team		29 November 2021

APPENDIX A – SUMMARY OF HRA BUDGET MOVEMENTS 2022-23

	HRA Budget movement
	£000
Inflation	2,844
Service commitments	11,179
Inflation, budget pressures and commitments	14,023
Increase in rental income	(5,374)
Tenant service charges	(837)
Sheltered housing service charges	(54)
District heating charges	(457)
Fees, charges and third party income	(30)
Garage and non-residential charges	(222)
Homeowner service charges	(965)
Capitalisation of building survey charges	(4,930)
Income generation	(12,869)
Efficiency savings	(1,154)
Efficiency savings and improved use of resources	(1,154)
HRA budget gap	0

APPENDIX B – HRA SUMMARY REVISED 2021-22 AND INDICATIVE BUDGET 2022-23

	2021-22 Revised budget	2022-23 Indicative budget
	£m	£m
Employees	40.4	44.0
Operational running costs	36.5	37.1
Estate cleaning and grounds maintenance	18.2	18.2
Repairs and maintenance	50.5	59.2
Contributions to investment programme, great estates and major projects	27.1	27.1
Corporate support costs	11.1	11.1
Depreciation	53.0	53.0
Financing costs	30.6	30.6
Tenant management organisations (TMOs)	7.0	7.0
HRA Expenditure	274.4	287.3
Dwelling rents	(196.7)	(202.1)
Non-dwelling rents	(5.8)	(6.0)
Heating and hot water charges	(8.8)	(9.3)
Tenant service charges	(15.7)	(16.5)
Homeowners - major works	(11.0)	(11.0)
Homeowners - service charges	(21.3)	(22.3)
Interest on balances	(0.7)	(0.7)
Commercial property rents	(8.3)	(8.3)
Fees, charges and third party income	(2.8)	(2.9)
Recharges	(3.3)	(8.2)
HRA Income	(274.4)	(287.3)
HRA Total	0.0	0.0

APPENDIX C – HRA INFLATION, BUDGET PRESSURES AND COMMITMENTS 2022-23

Division	Reference	Cabinet Member	Description	2022-23	Comments
				£000	
All Services	HRA150	Cllr Stephanie Cryan	General inflation provision	2,844	Annual inflation provision to meet price increases across a broad range of budget heads, including employees, operational running costs/energy usage and works contracts comprising repairs and maintenance, mechanical and electrical engineering and heating
Asset Management	HRA151	Cllr Stephanie Cryan	Building Safety - new dedicated building safety team (recruitment phased over two years)	1,278	Building Safety - estimated staffing requirement is 35 posts + 2 PMO posts - recruitment to be phased over two years
Asset Management	HRA152	Cllr Stephanie Cryan	Building Safety - surveying and intrusive safety investigation and safety cases (in-scope building programme phased over two years)	4,930	Estimated cost of surveying is £58k per block x 170 blocks = £9.86m to be undertaken by 31 March 2024. One-off cost over two years, then falls out in Year 3. Surveys are estimated to take up to sixteen weeks. Additional blocks deemed as 'high risk' (69) will be addressed through the mainstream capital works programme
Asset Management	HRA153	Cllr Stephanie Cryan	Building Safety - additional compliance works arising from building safety surveys	500	Increase in compliance budget to cover additional costs arising from building safety inspections
Asset Management	HRA154	Cllr Stephanie Cryan	Disrepair - additional legal and compensation costs to deal with historic claims and increased volume	1,000	Based on existing demand pressure, including impact of Habitation Act and targeting of residents by compensation claims firms. Increasing numbers of claims is a nationwide position
Asset Management	HRA155	Cllr Stephanie Cryan	New district heating team (recruitment phased over two years)	350	District heating team structure to deliver works programme (interim for one year then bulk of team to be capitalised as works programme commences)
Asset Management	HRA156	Cllr Stephanie Cryan	Southwark Building - impact of new Terms and Conditions	400	Estimated cost of transitioning to new T&C's for works labour force (tbc). Currently being assessed using actual cost information
Asset Management	HRA157	Cllr Stephanie Cryan	Southwark Building - disrepair	600	Estimated cost for additional contractors to deliver disrepair works that fall within the remit of Southwark Building

Division	Reference	Cabinet Member	Description	2022-23	Comments
				£000	
Asset Management	HRA158	Cllr Stephanie Cryan	Leaks from above team (additional post to address capacity shortfall)	55	1 x Hay 11 to address capacity shortfall
Asset Management	HRA159	Cllr Stephanie Cryan	New procurement and fire task team	432	Additional resource for Southwark Building procurement and Fire Task Teams, total cost £432k of which £200k to be capitalised
Resident Services	HRA160	Cllr Stephanie Cryan	Estate Management - Anti-Social Behaviour - demand led increase in legal costs to tackle increased activity	105	Increasing legal costs currently covered by reserves - SLA to be reviewed
Resident Services	HRA162	Cllr Stephanie Cryan	Estate Management - emergency TA placements, e.g. domestic abuse, violence, gangs etc.	450	Currently 59 cases (down from 83 last year) based on current numbers - projected spend is circa. £1m, budget of £125k pa. is for approx. 6 - 8 households per month. Growth allows for approx. 35 - 40 households per month
Resident Services	HRA163	Cllr Stephanie Cryan	Temporary Accommodation Estate Voids - refurbishment and repairs budget	500	Current projected overspend of £750k - previous commitment made in 2021-22, but void throughput continues to increase (estimated at 8 per week, up from 5)
Communities (HRA)	HRA164	Cllr Stephanie Cryan	T&RA Halls repairs and compliance budget	200	Increased repairs and compliance costs particularly around FRA related issues - overspend in the last two years has been c. £200k. Needs to be considered as part of council's carbon reduction target
Exchequer Services	HRA166	Cllr Stephanie Cryan	Homeowners Building Insurance - annual contract uplift	204	Annual price uplift in line with contract terms - fully recoverable from homeowners through service charges - contract subject to retendering for 2022-23. Final year agreed costs of 4% increase in RICS only not including IPT on total billed
Exchequer Services	HRA167	Cllr Rebecca Lury	Contact Centre - SMART and Out of Hours service	175	Base budget requires rebasing to reflect current activity/demand. HRA element of jointly funded service with GF
				14,023	

APPENDIX D – HRA INCOME GENERATION 2022-23

Division	Reference	Cabinet Member	Description	2022-23	Comments
				£000	
Resident Services	HRA121	Cllr Stephanie Cryan	Sheltered Housing Service Charges	(54)	Annual rebasing of sheltered housing service charges to reflect current/anticipated cost of providing enhanced housing management support to residents - second tranche of staged implementation (2021-22 to 2022-23)
Exchequer Services	HRA122	Cllr Stephanie Cryan	Garage Rents and Non-Residential Charges	(222)	Detrimental impact of Covid on lettings and hence rental stream - gradual recovery in activity expected to continue throughout 2022-23 to pre-Covid level. Increase in charges of 3.1% in line with September CPI, will generate income growth over existing budget
Exchequer Services	HRA123	Cllr Stephanie Cryan	Homeowner Revenue Service Charges	(965)	Annual rebasing of rechargeable income budget to reflect current/anticipated volumes and activity to ensure full cost recovery from homeowners under the terms of their lease
All Services	HRA124	Cllr Stephanie Cryan	Miscellaneous Mandatory and Discretionary Fees and Charges	(30)	Annual review of miscellaneous mandatory and discretionary fees and charges for services in line with Council's MTRS
Central Services	HRA126	Cllr Stephanie Cryan	Tenant Rents	(5,374)	Guideline rent increase @ September 2021 CPI (3.1% +1%), including stock/void movements and full-year impact of closure of shared hostel accommodation arising from Covid
Central Services	HRA127	Cllr Stephanie Cryan	Tenant Service Charges	(837)	Annual rebasing of charges to reflect estimated uplift in contract costs to ensure full cost recovery from service users, including allowance for impact of energy price rises
Central Services	HRA128	Cllr Stephanie Cryan	District Heating and Hot Water Charges	(457)	Increase in charges capped in line with rents in lieu of on-going assessment of energy market price volatility
Asset Management	HRA129	Cllr Stephanie Cryan	Capitalisation of building safety surveys	(4,930)	Immediate revenue costs of surveys funded from investment programme
				(12,869)	

APPENDIX E – HRA EFFICIENCIES AND IMPROVED USE OF RESOURCES 2022-23

Division	Reference	Cabinet Member	Description	2022-23	Comments
				£000	
Resident Services	HRA101	Cllr Stephanie Cryan	Special Investigations Team - reduction of one vacant post from existing team of ten	(45)	No service impact
Resident Services	HRA102	Cllr Stephanie Cryan	Great Estates Programme Pilot due to end in May 2022. Residual works to be subsumed into mainstream estate management	(979)	Residual works to be subsumed into mainstream estate management
Resident Services	HRA103	Cllr Stephanie Cryan	Hostels - removal of operational running cost budgets for decommissioned hostels designated for provision of new homes	(100)	No service impact as shared hostel accommodation closed and residents re-housed
Customer Experience	HRA108	Cllr Rebecca Lury	MSHO Service - close Market Place	(30)	Will need to continue to provide face to face service and potentially increase contact centre staff and complaints team to manage additional calls and complaints
				(1,154)	

APPENDIX F – HRA SUBJECTIVE INDICATIVE BUDGET 2022-23

	2021-22 Revised budget	Inflation, budget pressures and commitments	Income generation	Efficiency savings and improved use of resources	2022-23 Indicative budget
	£000	£000	£000	£000	£000
Employees	40,459	3,840	-	(236)	44,063
Operational running costs	36,541	759	-	(130)	37,170
Estate cleaning and grounds maintenance	18,183	-	-	-	18,183
Repairs and maintenance	50,532	9,424	-	(788)	59,168
Contributions to investment programme, great estates and major projects	27,070	-	-	-	27,070
Corporate support costs	11,110	-	-	-	11,110
Depreciation	53,000	-	-	-	53,000
Financing costs	30,555	-	-	-	30,555
Tenant management organisations (TMOs)	6,955	-	-	-	6,955
HRA Expenditure	274,405	14,023	-	(1,154)	287,274
Dwelling rents	(196,690)	-	(5,374)	-	(202,064)
Non-dwelling rents	(5,793)	-	(222)	-	(6,015)
Heating and hot water charges	(8,838)	-	(457)	-	(9,295)
Tenant service charges	(15,687)	-	(891)	-	(16,578)
Homeowners - major works	(11,000)	-	-	-	(11,000)
Homeowners - service charges	(21,335)	-	(965)	-	(22,300)
Interest on balances	(700)	-	-	-	(700)
Commercial property rents	(8,275)	-	-	-	(8,275)
Fees, charges and third party income	(2,830)	-	(30)	-	(2,860)
Recharges and capitalised expenditure	(3,257)	-	(4,930)	-	(8,187)
HRA Income	(274,405)	-	(12,869)	-	(287,274)
HRA Total	0	14,023	(12,869)	(1,154)	0

Item No. 24.	Classification: Open	Date: 7 December 2021	Meeting Name: Cabinet
Report title:		Approval of TfL funding grant submission for 2022-23	
Ward(s) or groups affected:		Borough wide	
Cabinet Member:		Councillor Catherine Rose, Transport, Parks and Sport	

FOREWORD - COUNCILLOR CATHERINE ROSE, CABINET MEMBER FOR TRANSPORT, PARKS AND SPORT

This report is to be considered in the context of the current funding predicament of Transport for London. At the time of writing, there has been no interim settlement to agree the financial settlement for TfL past 11 December 2021. This bid document is a submission for funding for 2022-23 and in line with the revised bidding criteria and priorities set out to us by TfL. The amount being bid for is reflective of our previous borough allocations and is a prudent amount of money but strategic in its application to deliver key projects that have local and strategic significance for the wider TfL network.

It reflects our own borough priorities in terms of key schemes that are deliverable and proven interventions that will help us deliver on our key Movement Plan strategies for reducing the overall number of vehicles on the our roads and car journeys through our borough. The bid also protects and sustains this borough's commitment to see key growth projects such as the Bakerloo Line Extension being delivered and the benefits of jobs, housing, opportunities and social mobility being realised for thousands of our residents, many from some of the most low-income communities in London.

The projects listed are important to assist us to reduce the amount of carbon emissions by 2030 and to contribute more widely to tackling the Climate Emergency.

It is incumbent now on the Department for Transport, The Cabinet Office and The Treasury to ensure that TfL and all Londoners get the much-needed financial investment to allow boroughs such as ours create the transport network it deserves and needs now and for future growth.

RECOMMENDATIONS

Recommendations for the Cabinet

1. Agrees the content of the council's proposed LIP submission to TfL that identifies transport projects to be delivered using this funding in 2022-23 in

Appendix A and that this be submitted to TfL.

Recommendation(s) for the Leader of the Council

2. Delegates authority to the cabinet member for transport, parks and sport to amend the programme for 2022-23 should any variations to the proposed programme be required.
3. Delegates authority to the cabinet member for environment, transport management and the climate emergency to determine the most appropriate use of the £100k discretionary funding allocated by TfL for 2022-23.

BACKGROUND INFORMATION

4. The Mayor of London revised and published his new Mayor's Transport Strategy (MTS) in March 2018. Section 145 of the Greater London Authority Act 1999 (GLAA 1999) requires each council in London to prepare a Local Implementation Plan (LIP) to detail how the authority will assist in delivering the MTS. In response to this requirement the Council adopted the Movement Plan in spring 2019.
5. TfL provides financial assistance to boroughs, sub-regional partnerships and cross-borough initiatives under section 159 of the GLA Act 1999. All councils within London are able to bid for funding to deliver schemes identified in the LIP (or Movement Plan).
6. Southwark is now required to prepare a second three-year plan for their current LIPs, covering the period 2022/23 to 2024/25 with TfL publishing draft guidance in early August. Given the challenges around funding and recovery, TfL is asking boroughs to develop this plan in stages. The first stage contained within this report is a detailed plan 2022/23.
7. The further two and three years of the plans up to 2024/25 will be further developed and submitted in summer 2022 with a specific date to be set closer to this time.
8. TfL have indicated that the funding sought should be based on pre-pandemic formula allocation levels, which for Southwark in 2019/20 (base year) was £2.048m supported by £100k of Local Transport Funding. The TfL guidance states *'For borough cycling schemes (funded via Cycleways Network Development) boroughs are asked to include up to two schemes in design and up to two schemes for delivery. Routes for delivery in year 1 may include projects that were paused pre-pandemic or schemes to make temporary routes permanent. For Bus Priority please again take an ambitious yet realistic view of what you can deliver, using previous allocations and spend may be a helpful guide but the context of project specific factors should be taken into account'*
9. TfL guidance sets out the required focus areas of the programme, that derive from the London Recovery Board's missions and include;

- Enabling all Londoners to feel that active travel is a safe and accessible option
 - Enhancing and expanding London's bus priority network.
10. The guidance supports a data led approach informed by TfL's strategic analysis focused around casualty harm, bus level of service, walking, cycling and neighbourhood analysis

KEY ISSUES FOR CONSIDERATION

11. Given the limited amount of funding available and the total number of possible projects, they require prioritisation. Officers have reviewed the programme and identified the proposed schemes using available data and with reference to strategic priorities reflecting Southwark's Movement Plan and the broader council regeneration objectives to determine the final scheme list in Appendix A.
12. The programme has been developed around;
- Continuing delivery of schemes from 2021/22
 - Schemes identified through strategic need analysis
 - Schemes identified through commonplace/community led schemes
 - Schemes to be coordinated with other programmes such as growth schemes, etc.
13. Whilst TfL have provided an indicative level of funding based on allocated funds in 2019/20, this funding is not currently secured or available. It is highly likely given the challenging financial situation TfL are managing and their ongoing need to negotiate funding settlements with the government (via DfT) that the programme will be subject to further consideration and possible amendments.

Policy framework implications

14. The proposed LIP programme of works in Appendix A is consistent with the council's Movement Plan, the Cycle Strategy as well as the council's broader policy framework for its Health and Wellbeing Strategy and the Southwark 2016: Sustainable Community Strategy and various national and regional policies.

Community, equalities (including socio-economic) and health impacts

Community impact statement

15. The proposed schemes that receive funding from TfL aim to provide a positive benefit for people living and working in Southwark. This is achieved by engaging with local people before the implementation of any scheme.

Equalities (including socio-economic) impact statement

16. An equality analysis and a strategic environmental assessment on the

community impact were undertaken as part of the development of Southwark's Movement Plan. The Movement Plan also addresses the council's responsibilities to eliminate discrimination, promote equality of opportunity and good relations between the different groups. The analysis of the Movement Plan objectives was found to be consistent with these equality objectives.

17. These LIP proposals are in accordance with council policies and have been developed through the Movement Plan Equity Framework and is also supported by its own EQiA. They should have a positive impact on the majority of our residents. However, the council will undertake ongoing monitoring to ensure there are no unforeseen consequences for communities or that any identified impacts are proportionate to the overall objective of the programme and are minimised where possible. This currently takes place through an Annual Monitoring Report collating all available data on the impacts of the plan. It identifies general travel trends within Southwark and includes an assessment of any variations in the impacts across different groups.

Climate change implications

18. These LIP proposals are in accordance with the Council's Movement Plan, which was a vital policy document in informing the development of the council's Climate Change Strategy and Action Plan. One of the five key themes from the climate strategy is 'Active and Sustainable Travel'. This recognises that 15% of the borough's carbon emissions are generated by transport, which is almost entirely from on-road transport. The climate strategy requires both a reduction in car miles travelled by at least 9%, a transition to electric vehicles and a switch to sustainable forms of transport, ensuring that walking and cycling become the default way to travel.
19. The LIP contains a number of projects set out under key programmes which will all support the council's transition towards a net zero borough by 2030, including; Healthy Streets, Cycling and Bus Priority. The listed projects will direct support the council in achieving a number of actions set out within the climate strategy;
 - Continue to develop the cycling network in conjunction with the installation of LTNs
 - Install 200 new EV charge points by 2022 and confirm longer term implementation strategy
 - Increase enforcement on idling, introduce parking zones and road closures near schools during peak hours; support with public awareness campaigns.
20. The monitoring work proposed within the LIP also supports the aims of the climate strategy to ensure data is captured on projects, to quantify their benefits but also to inform future modelling on the level of carbon emissions within the borough. This work will help to support future iterations of the Climate Change Strategy and Action Plan.

Financial implications

21. As a funding bid to TfL the proposed LIP schemes have no capital or revenue implications for Southwark, except for officer's time to prepare these bids. Details of the proposed LIP schemes together with the indicative costs of these bids are presented in Appendix xx.
22. Indicative management and implementation costs for each scheme have been taken into account in the submission.

Consultation

23. This LIP bid was an extension of the consultation carried out during the production of the Movement Plan which allowed more than 12 weeks for the public to comment in late November 2018 and February 2019. The Movement Plan consultation included inviting views via, the council's Consultation Hub, electronic newsletters and social media networks, workshop with the Over 60's, Young Advisors, street interview surveys and via an online survey.
24. A key element of the evidence base, used to identify possible schemes, is the correspondence, commonplace webpage and feedback received from the public over previous years.
25. Once TfL have confirmed funding for the proposed LIP bid projects then the council shall conduct separate formal engagement with stakeholders, residents and other interested parties on those schemes prior to their detailed design or implementation.
26. Furthermore, all infrastructure schemes will now go before the community council to allow local people an opportunity to influence the proposals affecting their area. Where schemes are altered, dropped, or where

SUPPLEMENTARY ADVICE FROM OTHER OFFICERS

Director of Law and Governance

27. This report seeks approval of the council's proposed LIP submission to TfL that identifies transport projects to be delivered using the funding allocation for 2022 - 23. As stated in the background information at the beginning of this report, section 145 of the Greater London Authority Act 1999 (GLAA 1999) requires London boroughs to prepare a LIP outlining their proposals and how they intend to implement the MTS in their respective areas. Councils are required to consult various bodies and must include an implementation timetable for the proposals in their plan.
28. Section 146 of the GLAA 1999 provides for the Mayor to approve each LIP, ensuring that they adequately implement the MTS. The Mayor must not approve a LIP bid unless he is satisfied that it is consistent with the MTS,

and that the bid proposals are adequate to achieve the MTS within an appropriate implementation timetable

29. Under section 151 of the GLAA 1999, once a LIP plan has been approved by the Mayor the council must implement it according to the timetable in the plan. 31. Section 152 of the GLAA 1999 states that if the Mayor considers that a council has not carried out any proposal in its LIP satisfactorily and according to the timetable in the plan, he can exercise the appropriate powers of the council, at their expense, to fulfil the strategy. Furthermore, section 153 of the GLAA 1999 provides that the Mayor may give legally binding directions to councils on the manner in which they perform any of their duties outlined in sections 145 to 151, i.e. provisions on the preparation, submission, re-submission, revision and implementation of their LIP.
30. Section 159 allows TfL to give financial assistance (by grant, loan or other means) to any person or body for expenditure conducive to the provision of safe, integrated, efficient and economic transport facilities. This permits TfL to impose conditions on financial assistance it provides.
31. The LIP bid has to comply with the public sector equality duty in accordance with the provisions of the Equality Act 2010. The community impact statement notes that the requirements contained within section 149 of the Equality Act have been duly considered and assessed, and this is evidenced in an equality analysis and a strategic environmental assessment on the community impact undertaken as part of the development of the Movement Plan. During the delivery of the identified transport projects, their impact will be monitored and recorded in an annual monitoring report.
32. Under paragraph 6, Part 3D of the constitution the relevant cabinet member has authority to agree statutory or other strategies in relation to their area of responsibility. In addition under paragraph 4, the individual member has authority to approve the submission of bids for additional resources from government and other agencies in relation to their area of responsibility, where member level agreement is required by the external agency. However, due to the cross-cutting nature of transport projects, the cabinet member has requested that this matter be considered by full cabinet.

Strategic Director of Finance and Governance (CE21/054)

33. This report is seeking cabinet approval to submit the council's proposed LIP annual spending submission to TfL for the 2022/23 allocation of £3.398m as detailed in Appendix A.
34. This report is also requesting the Leader of the Council to delegate authority to the cabinet member for transport, parks and sport to amend the programme for 2022-23 should any variations to the proposed programme be required and to delegate authority to the cabinet member for environment, transport management and the climate emergency to determine the most appropriate use of the £100k discretionary funding

allocated by TfL for 2022-23

35. The strategic director of finance and governance notes the financial implications contained in the report and once the LIP is approved by TfL, expects detailed programme budgets to be set up, for regular monitoring and reporting as part of the council's capital and revenue monitoring arrangements.
36. Staffing and any other costs connected with this recommendation to be contained within existing departmental revenue budgets.

BACKGROUND DOCUMENTS

Background Papers	Held At	Contact
Movement Plan 2019	Southwark Council, 160 Tooley Street, London SE1 2QH	Sally.crew@southwark.gov.uk
Link: https://moderngov.southwark.gov.uk/ieDecisionDetails.aspx?ID=6809		

APPENDICES

No.	Title
Appendix A	TfL grant programme 2022/23

AUDIT TRAIL

Cabinet Member	Councillor Catherine Rose, Transport, Parks and Sport	
Lead Officer	Stephen Platts, Director of Planning and Growth	
Report Author	Sally Crew, Transport Policy Manager	
Version	Final	
Dated	29 November 2021	
Key Decision?	Yes	
CONSULTATION WITH OTHER OFFICERS / DIRECTORATES / CABINET MEMBER		
Officer Title	Comments Sought	Comments Included
Director of Law and Governance	Yes	Yes
Strategic Director of Finance and Governance	Yes	Yes
Cabinet Member	Yes	Yes
Date final report sent to Constitutional Team	29 November 2021	

APPENDIX A

Priority	Programme	Scheme	Funding (£k)
1	Cycling	Lower Road – cycleway Covid scheme	600
2	Healthy Streets	Low traffic school zones	400
3	Healthy Streets	Behaviour change	200
4	Healthy Streets	Cycle and scooter training	200
5	Healthy Streets	Low carbon community zone - Wyndham Road	140
6	Healthy Streets	Evelina Road improvements	150
7	Healthy Streets	Vision Zero – safer high streets	58
8	Healthy Streets	Active travel community zones	150
9	Healthy Streets	Access to public transport (Denmark Hill-phase 2)	150
10	Healthy Streets	Bonamy and Bramcote low carbon neighbourhood	200
11	Cycling	Rotherhithe to Peckham cycleway	400
12	Cycling	Southwark Cycling Spine - Kelly Avenue	150
13	Cycling	Cycleway 35 (formerly Q9)	50
14	Healthy Streets	Monitoring programme	100
15	Bus Priority	Peckham bus priority	50
16	Healthy Streets	Cycle hire expansion	100
17	Healthy Streets	Walworth Healthy Streets	50
18	Healthy Streets	Low carbon transport (EVCP)	100
19	Healthy Streets	ULEZ implementation measures	50
20	Local Transport Fund	Local Transport Fund	100
Total			£3,398k
Total (Healthy Streets)			£2,048k
Total (Cycling)			£1,200k
Total (Bus Priority)			£50k
Total (Local Transport Fund)			£100k

Item No. 25.	Classification: Open	Date: 7 December 2021	Meeting Name: Cabinet
Report title:		Response to the environment scrutiny commission - air quality (Part 2)	
Ward(s) or groups affected:		Borough wide	
Cabinet Member:		Councillor Catherine Rose, Transport, Parks and Sport	

FOREWORD – COUNCILLOR CATHERINE ROSE, CABINET MEMBER FOR TRANSPORT, PARKS AND SPORT

I wish to thank all the members of the Overview and Scrutiny Committee and specifically the Environmental Scrutiny Commission for their work throughout the past 12 months. I look forward to engaging with the Committee on 1 December and also early in the New Year to set out how we are working through all the recommendations in relation to Streetscape Schemes, Air Quality and overall traffic reduction measures to help us deliver a low traffic borough in line with our Movement Plan, Climate Emergency Change Action Plan and Air Quality Strategies.

RECOMMENDATIONS

1. To receive an update on officers' responses to Environment Scrutiny Commission's Report 'Air Quality scrutiny review report- part two' dated April 2021 for information further to the report considered at Cabinet September 2021.

BACKGROUND INFORMATION

2. In April 2021, the Environment Commission agreed their report 'Air quality scrutiny review report - part two' which was subsequently presented to cabinet on 14 September 2021. The report focused on three areas; the effective implementation of Low Traffic Neighbourhoods (LTN), additional council and TFL measures to reduce and mitigate transport emissions in Southwark and making recommendations to the council and relevant partners in order to reduce other sources of air pollution, not covered in depth by the previous scrutiny review on Air Quality in 2019/20.
3. This paper sets out officers' response to each of the recommendations in the air quality report

KEY ISSUES FOR CONSIDERATION

4. **Recommendation 1:** The framework to evaluate the LTNs ought to be provided in full to scrutiny to review, and this ought to summarize work with the Emergency Services, including LAS preference for cameras.
5. *The council has made all the baseline data and evaluation for low traffic neighbourhood schemes publically available via the council's website. There has been a recognized challenge in providing a sufficiently robust data given the changing travel patters throughout the past 18 months, with this the council has made a commitment to the longer term monitoring of these schemes to better understand their impact across a longer time period.*
6. **Recommendation 2:** When evaluating LTNs the council ought to measure footfall on high streets, where it is possible to establish a baseline. The council also ought to outline work undertaken with traders to ensure that any difficulties (e.g. receiving supplies) are addressed and that the opportunity to maximize footfall and support the local economy is delivered.
7. *The council with TfL maintains 21 vivacity cameras at key high street locations across the borough. The information from these cameras provides a continual feed of footfall counts and can be used to understand changing walking levels at these high street locations. This information has been used in the evaluation of a number of LTNs including Walworth and Dulwich.*
8. **Recommendation 3:** The Council should conduct an analysis of schools that might be more disproportionately impacted by air pollution compared to other schools (looking in particular at schools with higher proportions of students on free school meals or with students that have English as a Second Language) Where these schools are on main roads, the analysis should identify actions that can a) be tied in with the Low Traffic Southwark strategy to reduce traffic on those main roads and b) mitigate the impact of that traffic in and around the school itself.
9. *The council maintains a holistic yet data informed approach to working with schools. There has been a focus on working with schools identified through the Movement Plans equity framework, local community needs and the schools willingness and ability to engage with the council.*
10. **Recommendations 4:** Focus on increasing PTAL in regeneration areas and where levels are low, e.g. the south of the borough, in order to reduce parking levels in new developments as close to zero as is possible.
11. *The council has been working with TfL as the strategic transport authority to improve access to and quality of service to regeneration areas. This has been particularly challenging given current funding pressures. The council has however ensured that car free development in the borough is delivering.*

12. **Recommendation 5:** There is evidence of a far broader demographic audience being attracted to cycling during the pandemic as traffic levels have fallen. Targeted work is needed with women, low income, older people, disabled people, children and young people and some Black, Asian and Minority Ethnic communities to increase cycling rates.
13. *The council recognises that a wider part of the community has been drawn to cycling through the pandemic for a wide range of reasons, healthier, quieter roads, use of public transport less desirable and a change in travel patterns. Pre-pandemic Central government and TfL in turn have invested heavily in cycle infrastructure (routes and parking), the borough in low traffic neighbourhoods. Complimentary schemes such as cycle training has received lower levels of funding subsequently the council has had to reduce this offer to focus on children. It is hoped that once the council receive a more stabilized funding agreement, we can reopen this offer to the whole community*
14. **Recommendation 6:** Work with Business Improvement Districts to deliver Nests to enable the delivery and pick up of online shopping. Follow up on Recommendation 15 of the Air Quality report and understand how sustainable freight is being worked into other Southwark strategies including the Movement Plan, as part of regeneration schemes and if the council is using sustainable freight for in-house services, where possible.
15. *The council has been expanding the reach of freight initiatives and learning. The council is part of Cross River Partnerships Clean Air Villages project which seeks to implement freight initiative and learning across central London, the borough was a partner in Centre for London's report 'Worth the Weight: Making London's deliveries greener and smarter' which includes a case study on the Old Kent Road. We are engaging with local business to improve delivery and servicing as part of the offer on the Walworth Road Low Emission Neighbourhood. As well as looking ahead and incorporating wider delivery and servicing consolidation within regeneration areas particularly the Old Kent Road.*
16. **Recommendation 7:** Implement a pilot e cargo scheme in 2022, once the current focus on LTNs and school streets is embedded, and we are firmly in recovery from the pandemic.
17. *With financial support from the High Street recovery fund an e cargo bike scheme is currently being undertaken in Lordship Lane, Dulwich.*
18. **Recommendation 8:** The commission therefore recommends that once the LTN review is completed that more time is given over to responding to each of the commission's previous recommendations and that officers and cabinet leads return to the commission with a detailed operational plan outlining how Low Traffic Southwark will be delivered and provide a full response to the below:
 - Develop an operational plan with partners to implement this, focusing

on structural changes, informed by the ambitions of the Movement Plan and its associated deprivation data.

- Viability testing of the target to reduce traffic by 90% by 2030 3) End the current diesel contract for Southwark fleet vehicles and switch to EV as soon as possible. Swap EV for sustainable transport / freight. Revisit our procurement strategy to ensure subcontractors have EV or a sustainable fleet. Set a cut-off date for compliance so that subcontractors have time to make the switch. (marked to be considered)
- Southwark adopts a maximum charge for bike hubs/hangers that ensures that is cheaper than car parking by space (marked to be considered)
- An update on charging for parking in the borough including the development and implementation of the emissions based charging policy and if this will include reductions in car parking provision.
- A borough-wide greenery programme to use native hedges to screen to against air pollution, ecological planting and also improve the environment and place making. Examples include allotments and wildlife sanctuaries. (marked to be considered).

19. *Noted, once the existing LTN reviews have been completed a wider report and response will be prepared.*

Financial implications

20. There are no financial implications associated with the recommendations set out within this report.
21. Any action plans arising from this report is expected to be contained within existing budgets. Any costs that cannot be contained within existing budgets will be incorporated within the council's budget setting process.
22. Staffing and any other costs connected with this report to be contained within existing departmental revenue budgets.

BACKGROUND DOCUMENTS

Background Papers	Held At	Contact
Scrutiny commission report cabinet 14 September 2021	Title of department / unit Address	Name Phone number
<p>Link (please copy and paste into browser): https://moderngov.southwark.gov.uk/documents/s101273/Appendix%20A%20Air%20Quality%20part%20two%20report.pdf</p>		

APPENDICES

No.	Title
None	

AUDIT TRAIL

Cabinet Member	Councillor Catherine Rose, Transport, Parks and Sport	
Lead Officer	Matt Clubb, Director of Environment	
Report Author	Sally Crew, Transport Policy Manager	
Version	Final	
Dated	29 November 2021	
Key Decision?	No	
CONSULTATION WITH OTHER OFFICERS / DIRECTORATES / CABINET MEMBER		
Officer Title	Comments Sought	Comments Included
Director of Law and Governance	No	No
Strategic Director of Finance and Governance	No	No
Cabinet Member	Yes	Yes
Date final report sent to Constitutional Team	29 November 2021	

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