

Cabinet



Agenda

MONDAY
13 JANUARY 2025
7.00 pm

COPPER SUITE
GROUND FLOOR
CLOCKWORK BUILDING
45 BEAVOR LANE
LONDON W6 9AR

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Date Issued
03 January 2025

Membership

Councillor Stephen Cowan, Leader
Councillor Alex Sanderson, Deputy Leader (responsible for Children and Education)
Councillor Bora Kwon, Cabinet Member for Adult Social Care and Health
Councillor Wesley Harcourt, Cabinet Member for Climate Change and Ecology
Councillor Andrew Jones, Cabinet Member for the Economy
Councillor Rowan Ree, Cabinet Member for Finance and Reform
Councillor Frances Umeh, Cabinet Member for Housing and Homelessness
Councillor Sharon Holder, Cabinet Member for Public Realm
Councillor Rebecca Harvey, Cabinet Member for Social Inclusion and Community Safety
Councillor Zarar Qayyum, Cabinet Member for Enterprise and Skills

If you require further information relating to this agenda please contact:
Katia Neale, Committee Coordinator, tel: 07776 672 956 or email:
katia.neale@lbhf.gov.uk

Reports on the open Cabinet agenda are available on the Council's website: www.lbhf.gov.uk/councillors-and-democracy

Members of the Public are welcome to attend but spaces are limited. To register for a place please contact katia.neale@lbhf.gov.uk. Seats will be allocated on a first come first serve basis. A loop system for hearing impairment is provided, together with disabled access to the building.

DEPUTATIONS

Members of the public may submit a request for a deputation to the Cabinet on item numbers **4-8** on this agenda using the Council's Deputation Request Form. The completed Form, to be sent to Katia Neale at the above address, must be signed by at least ten registered electors of the Borough and will be subject to the Council's procedures on the receipt of deputations. **Deadline for receipt of deputation requests: Wednesday 8 January 2025.**

COUNCILLORS' CALL-IN TO SCRUTINY COMMITTEES

A decision list regarding items on this agenda will be published by **Tuesday 14 January 2025**. Items on the agenda may be called in to the relevant Accountability Committee.

The deadline for receipt of call-in requests is: **Friday 17 January 2025 at 3.00pm**. Decisions not called in by this date will then be deemed approved and may be implemented.

A confirmed decision list will be published after 3:00pm on **Friday 17 January 2025**.

Cabinet Agenda

13 January 2025

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<p>If a Councillor has a disclosable pecuniary interest in a particular item, whether or not it is entered in the Authority's register of interests, or any other significant interest which they consider should be declared in the public interest, they should declare the existence and, unless it is a sensitive interest as defined in the Member Code of Conduct, the nature of the interest at the commencement of the consideration of that item or as soon as it becomes apparent.</p> <p>At meetings where members of the public are allowed to be in attendance and speak, any Councillor with a disclosable pecuniary interest or other significant interest may also make representations, give evidence or answer questions about the matter. The Councillor must then withdraw immediately from the meeting before the matter is discussed and any vote taken.</p> <p>Where Members of the public are not allowed to be in attendance and speak, then the Councillor with a disclosable pecuniary interest should withdraw from the meeting whilst the matter is under consideration. Councillors who have declared other significant interests should also withdraw from the meeting if they consider their continued participation in the matter would not be reasonable in the circumstances and may give rise to a perception of a conflict of interest.</p> <p>Councillors are not obliged to withdraw from the meeting where a dispensation to that effect has been obtained from the Standards Committee.</p>	
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London Borough of Hammersmith & Fulham

Cabinet Minutes



Monday 16 December 2024

*NOTE: A recording of the meeting can be watched at on YouTube at:
https://www.youtube.com/live/j_uWqpi9sO/*

PRESENT

Councillor Stephen Cowan, Leader of the Council
Councillor Wesley Harcourt, Cabinet Member for Climate Change and Ecology
Councillor Sharon Holder, Cabinet Member for Public Realm and Lead Member for Inclusive Community Engagement and Co-production
Councillor Rebecca Harvey, Cabinet Member for Social Inclusion and Community Safety
Councillor Bora Kwon, Cabinet Member for Adult Social Care and Health
Councillor Rowan Ree, Cabinet Member for Finance and Reform
Councillor Alex Sanderson, Deputy Leader (with responsibility for Children and Education)
Councillor Frances Umeh, Cabinet Member for Housing and Homelessness
Councillor Zarar Qayyum, Cabinet Member for Enterprise and Skills

ALSO PRESENT

Councillor Adronie Alford

1. MINUTES OF THE CABINET MEETING HELD ON 4 NOVEMBER 2024

RESOLVED:

That the minutes of the meeting of the Cabinet held on 4 November 2024 be confirmed and signed as an accurate record of the proceedings, and that the outstanding actions be noted.

2. APOLOGIES FOR ABSENCE

Apologies for absence were received from Councillor Andrew Jones.

3. DECLARATION OF INTERESTS

There were no declarations of interest.

4. ADOPTION OF HAMMERSMITH & FULHAM COUNCIL'S NEW AIR QUALITY ACTION PLAN 2025-30

Councillor Wesley Harcourt, Cabinet Member for Climate Change and Ecology introduced the report aiming to protect the health and wellbeing of the people in the borough from the effects of air pollution, and to promote healthy living. He informed that Hammersmith & Fulham was the tenth worst local authority in England for air pollution - with 7.4% of deaths linked to toxic air. There was not a single part of the borough where the air quality met World Health Organisation targets.

The Council had a statutory duty to tackle pollution and was required to have an Air Quality Action Plan. The Plan, recommended in this report set out how the Council would work to meet national objectives for air pollution and help improve the health and wellbeing of everyone in the borough over the next five years. As a statutory document, the style and format of the Plan was quite technical and not easily understandable as it needed to follow a template.

In addition to health, the Plan was also important in terms of equalities because the most vulnerable people were living in the worst areas for air quality and their health was adversely affected.

Councillor Adronie Alford stated that there should be some tolerance to motorists using their cars and control on the misuse of e-bikes. As some of the suggestions on the Plan would impact some residents, Councillor Alford asked if the Council was going to consult with the local neighbourhood, particularly on issues related to parking, before implementing any changes.

The Leader confirmed that consulting with residents was key to the way this Council operated. Residents had been consulted extensively before the cleaner neighbourhood in South Fulham was introduced and it was now extremely popular. The essence of consultation was trying to understand people's concerns and taking reasonable measures to address them. However, any form of change could be controversial.

AGREED UNANIMOUSLY BY THE CABINET MEMBERS:

To agree the adoption of the Council's new Air Quality Action Plan 2025-30.

Reason for decision:

As set out in the report.

Alternative options considered and rejected:

As outlined in the report.

Record of any conflict of interest:

None.

Note of dispensation in respect of any declared conflict of interest:

None.

5. GAS AND ANCILLARIES TERM-SERVICE CONTRACT (HOUSING)

Councillor Frances Umeh, Cabinet Member for Housing and Homelessness, introduced the report seeking to approve the procurement strategy to procure a new gas and ancillaries' contractor, starting on 1 August 2025. The provision of safe gas, heating and hot water was fundamental for the Council and was a priority of the building safety compliance.

Councillor Adronie Alford asked how the Council would ensure that a good contractor would be selected following the tendering process.

The Leader replied that the national legislation on procurement would be strictly followed, and the Council would seek the highest standards for its residents.

AGREED UNANIMOUSLY BY THE CABINET MEMBERS:

To approve the procurement strategy to procure a new gas and ancillaries' contractor, using the mini competition option of the SEC domestic and commercial heating framework, for a contract term of 5 years.

Reason for decision:

As set out in the report.

Alternative options considered and rejected:

As outlined in the report.

Record of any conflict of interest:

None.

Note of dispensation in respect of any declared conflict of interest:

None.

6. REVENUE BUDGET REVIEW 2024/25 - MONTH 6 (SEPTEMBER 2024)

Councillor Rowan Ree, Cabinet Member for Finance and Reform, introduced the review of the 2024 2025 Revenue budget looking at the budget as of month six. The report asked to note any variances and movements.

In response to a question from Councillor Alford, Councillor Ree assured that the HRA budget was going to balance. He was pleased to note that they had been able to eliminate the structural deficits in the HRA.

AGREED UNANIMOUSLY BY THE CABINET MEMBERS:

1. To note the General Fund financial forecast variance at Month 6 and mitigating actions to reduce the overspend forecast variance position (Table 1 and Appendix 1).

2. To note progress on delivering the 2024/25 agreed budget savings (Appendix 3)
3. To note the HRA forecast (paragraph section 13 to 15 and Appendix 2).
4. To approve the proposed budget allocations from s106 funding (Appendix 5).
5. To note and approve the budget movements (Appendix 4).

Reason for decision:

As set out in the report.

Alternative options considered and rejected:

As outlined in the report.

Record of any conflict of interest:

None.

Note of dispensation in respect of any declared conflict of interest:

None.

7. CAPITAL PROGRAMME MONITOR AND BUDGET VARIATIONS 2024/25 (QUARTER 2)

Councillor Rowan Ree introduced a budget monitoring report looking at the capital program as of the second quarter of the year. This report asked to note any variances and movements.

AGREED UNANIMOUSLY BY THE CABINET MEMBERS:

1. To note the overall forecast of £274.1m for 2024/25 capital expenditure which is a net decrease of £20m in comparison to the first quarter forecast of £294.1m.
2. To approve the updated four-year capital programme for 2024-2028 of £643m, as detailed in Appendix 1. This is a net increase of £66.6m in comparison to the four-year programme of £576.4m approved at Full Council in February 2024.
3. To approve an additional budget envelope of £1.45m for various General Fund capital schemes, funded from reserves (£1.3m), and borrowing (£0.150m) as detailed in paragraph 3 of the report.
4. To note the revenue impact of any additional borrowing, as outlined in the Economic and Strategic Overview section.
5. To approve £22.767m of s106 funding allocations for various capital schemes, as detailed in Appendix 5. The specific projects will be added

to the capital programme once the programme of works has been identified and the schemes' budgets are approved.

6. To delegate to the Strategic Head of Regeneration & Development ,in consultation with the Executive Director for Finance, the use of any unspent Right to Buy 1-4-1 receipts at risk of repayment to the Ministry of Housing, Communities and Local Government (MHCLG) to acquire homes on the open market without use of any additional borrowing, as described in paragraph 4 of this report.
7. To note the prudential indicators presented in Appendix 4, as per Prudential Code requirements.

Reason for decision:

As set out in the report.

Alternative options considered and rejected:

As outlined in the report.

Record of any conflict of interest:

None.

Note of dispensation in respect of any declared conflict of interest:

None.

8. LBHF COMPANIES UPDATE

Councillor Rowan Ree introduced the report providing an update on the status of the Council's companies. This was part of a biannual report brought to Cabinet since the Commercial Revenue Committee was decommissioned.

AGREED UNANIMOUSLY BY THE CABINET MEMBERS:

1. To note that Appendices 1-6 are not for publication on the basis that they contain information relating to the financial or business affairs of any particular person (including the authority holding that information) as set out in paragraph 3 of Schedule 12A of the Local Government Act 1972 (as amended).
2. To note the status of the companies.

Reason for decision:

As set out in the report.

Alternative options considered and rejected:

As outlined in the report.

Record of any conflict of interest:

None.

Note of dispensation in respect of any declared conflict of interest:

None.

9. DIGITAL ADVERTISING HOARDING OVERVIEW

Councillor Rowan Ree introduced the report giving an overview of all current digital advertising sites across the borough and an update on future planned sites to generate more revenue.

AGREED UNANIMOUSLY BY THE CABINET MEMBERS:

3. To note that Appendices 1-5 are not for publication on the basis that they contain information relating to the financial or business affairs of any particular person (including the authority holding that information) as set out in paragraph 3 of Schedule 12A of the Local Government Act 1972 (as amended).
4. To note the lease status and marketing position of current advertising sites.

Reason for decision:

As set out in the report.

Alternative options considered and rejected:

As outlined in the report.

Record of any conflict of interest:

None.

Note of dispensation in respect of any declared conflict of interest:

None.

10. FORWARD PLAN OF KEY DECISIONS

The Key Decision List was noted.

11. DISCUSSION OF EXEMPT ELEMENTS (ONLY IF REQUIRED)

There was no discussion of exempt elements.

Meeting started: 7.00 pm
Meeting ended: 7.18 pm

Chair

Report to: Cabinet

Date: 13/01/2025

Subject: Council Tax Support Scheme 2025/26

Report of: Councillor Rowan Ree, Cabinet Member for Finance and Reform

Report author: Kirsty Brooksmith, Assistant Director Benefits

Responsible Director: Sukvinder Kalsi – Executive Director for Finance & Corporate Services

SUMMARY

Since 2013, every council has been required to set its own Council Tax Support Scheme, setting out how it wants to help those on low income pay their council tax. The administration is determined to ensure that not only are residents no worse off than they would have been had the original Council Tax benefit regulations stayed in place, but also to try and reverse some of the regressive elements of Council Tax, by ensuring that lower income families are supported by the council. This constitutes a £9.1m investment by the Council to support the borough's lowest income families for 2025/26

Pre-2013, funding for the Council Tax Support Scheme was originally provided directly from the Government to cover the full cost of the scheme. Since then, funding has been absorbed and aggregated within other central government grants given to local authorities. The funding that the Council receives each year towards the cost of the scheme expenditure is contained within the Revenue Support Grant. Grant funding from Central Government has reduced by £36m (54% in real terms) from 2010/11 to 2024/25.

We know many of our residents are still feeling the squeeze from the increased cost of energy, petrol, and food prices, as such, we have invested more than £11m to provide much-needed cost-of-living support to our residents which includes dedicated support for older and vulnerable residents in need in H&F.

As well as being the only council in the country to provide free home care to older and Disabled residents, residents in need who lost their Winter Fuel Allowance can apply for up to £900 with our Crisis Prevention Fund.

We are working with partners to ensure all eligible residents apply for Pension Credit and subsequently will then receive their Winter Fuel Allowance too, and we're working on additional support for residents with the government's extension of the Household Support Fund.

To ensure that we do not add any further burden to our residents, and to continue our commitment to being a compassionate council we have once again chosen for 2025/26 not to introduce changes to our local scheme and we remain committed to

offering the most help to the lowest income families in our borough. We therefore remain committed to providing the maximum support to our residents with 100% support available to those on the lowest incomes.

During this financial year we carried out a full review of our Council Tax Support scheme, benchmarking ourselves against other local authorities, and modelled various options for new schemes. The aim was to ensure that our scheme is providing support to those that need it most, and that the scheme is simple for residents to access and for us to administer. Our modelling concluded that the other options considered did not provide material benefits in respect of reduced administration costs and were likely to negatively impact some of our residents currently in receipt of support and therefore we are recommending that we continue with our current scheme.

We compared schemes across neighbouring London authorities. 45% of those authorities had a banded income scheme and the remaining 55% had a scheme based on the previous Council Tax Benefit scheme (default scheme) which was like ours. However the range of support offered varied. The lowest level of support available was only 15% of council tax liability, and only three councils offered 100% as we do, the majority offered a reduced amount of 90%. In most other London boroughs residents on lowest incomes are expected to contribute something towards their council liability.

We were one of only 34 Councils out of 326 across England that retained scheme providing up to 100% support to our residents, when local schemes were introduced in April 2013. We have continued to provide this and 2025/2026 will be the 13th year that we have consistently provided up to 100% support to our residents.

In addition, we have also, during 2024/25, continued our cost-of-living support and we have invested more than £11m to provide much-needed cost-of-living support to our residents which includes dedicated support for older residents in need.

This report is therefore not proposing to make any changes to the Council Tax Support Scheme for 2025/26 other than the application of the annual uprating.

The annual uprating will apply to the allowances, applicable amounts, and income for both pensioners and working age Department of Work and pensions (DWP) benefits, as per the Housing Benefit uprating circular issued to local authorities in late November 2024. This circular advises the new rates from April 2025. All local authorities have a duty to apply uprating to their Housing Benefit Scheme and we propose to continue to reflect this uprating within our Council Tax Support Scheme to mirror the original intention of the default scheme. This will ensure transparency, ease of administration and clarity for our residents.

By not changing our scheme for 2025/26 it remains the most effective scheme for ensuring we provide the maximum support to our residents.

RECOMMENDATIONS

It is recommended that Cabinet agrees the following recommendations to be approved by Full Council:

1. That the Council Tax Support Scheme in operation in 2024/2025 (included at Appendix 1) shall continue in 2025/2026.
2. That the Council shall apply the annual uprating of allowances, applicable amounts and income, set out in the DWP Housing Benefit circular, to the Council Tax Support scheme for 2025/2026.

Wards Affected: All

Our Values	Summary of how this report aligns to the H&F Corporate Plan and the H&F Values
Building shared prosperity	We will support our low-income residents by ensuring our scheme gives them the maximum benefit of up to 100%, contributing to keeping their living costs, including their council tax, affordable
Creating a compassionate and inclusive council	We are continuing to deliver our local Council Tax Support Scheme to the most vulnerable amongst us, so we know they are supported financially.
Doing things with local residents, not to them	We will continue to listen to and work with our residents by offering financial support to them. We will continue to monitor the impacts of economic and welfare changes on our residents, ensuring we understand their needs. This will allow us to continue to target our help to support them where they say it is needed the most.
Being ruthlessly financially efficient	We want our residents to know we are working to protect and maintain policies that protect our most vulnerable

Financial Impact

The Council Tax Support Scheme operates by offering a discount to residents who need help paying their Council Tax. The cost of the scheme is shared between Hammersmith & Fulham Council and the Greater London Authority based on their respective Council Tax charges. The scheme cost is estimated at £13.9m in 2025/26, based on current Council Tax levels, of which the Hammersmith and Fulham share will be £9.1m. This estimate is allowed for within the 2025/26 Council Tax Base report and the Council's Medium-Term Financial Strategy.

Up until 2013, funding for the Council Tax Support Scheme (known as the Council Tax Benefit Scheme) was originally provided specifically through the Revenue Support Grant (RSG) from the Government. The Government abolished the national Council Tax Benefit scheme from 1 April 2013 and allowed local councils to develop their own local replacement schemes for working age residents. Government grant funding has reduced by £36m (54% in real terms) from 2010/11 to 2024/25.

Andre Mark, Head of Finance (Strategic Planning and Investment), 13 November 2024.
Verified by James Newman, Assistant Director of Finance, 13 November 2024.

Legal Implications

Each financial year the Council must consider whether it wants to revise its Council Tax Support Scheme, leave as is or replace it. The Council must make this decision no later than 31 January in the financial year preceding when the scheme is to take effect.

The Council has a statutory duty to set the council tax each year and this report is part of this process. The Council can only vary or set council tax discounts or higher amounts as legally empowered to do so. The relevant regulations and legislation are the Local Government Finance Act 1992, the Local Authorities (Calculation of Council Tax Base) Regulations 2012, and the Council Tax (Prescribed Classes of Dwellings) (England) Regulations 2003, as amended in 2012. The Council Tax base has been calculated in accordance with the relevant Acts and regulations.

The appended Council Tax Reduction Scheme has been considered in accordance with The Council Tax Reduction Schemes (Prescribed/Requirements) (England) (Amendment) Regulations 2024' The Secretary of State makes these Regulations in exercise of the powers conferred by section 113(1) and (2) of, and paragraph 2 of Schedule 1A to, the Local Government Finance Act 1992(1).

Verified by Jade Monroe, Chief Solicitor, 11 November 2024.

Background Papers Used in Preparing This Report

None

DETAILED ANALYSIS

Proposals and Analysis of Options

1. In our review of our Council Tax Support Scheme, we compared schemes across neighbouring London authorities. 45% of those authorities had a banded income scheme and the remaining 55% had a scheme based on the previous Council Tax Benefit scheme (default scheme) which was like ours. The lowest level of support available was 15% of council tax liability, only three councils offered 100% as we do, and the majority offered 90%.
2. We modelled a variety of changes to our schemes, including changes to capital limits, changes to non-dependant charges and the introduction of banded income schemes. When considering the capital limits, we also looked at the treatment of capital as income and we also considered changing the deductions for non-dependants in the household.
3. The overarching objective of the modelling was to ensure that we continued to provide maximum support (100%) for those who needed the most support. However, there was also a focus on making the scheme simpler for residents and simpler for the Council to administer.
4. The options were considered by the Section 151 Officer and the Cabinet Member for Finance and Reform. In all the options modelled some residents would be negatively impacted.
5. None of the options modelled provided significant financial benefits in reducing administrative costs. One of the reasons for this was that we would need to maintain our scheme as is for residents of pension age as this is required by law. The operation of two different schemes applying one to working age and one to pensioners would likely increase complexity in administration.
6. Given the findings of our comprehensive review none of the options are recommended for adoption and it is recommended that we continue with our current scheme.

Equality Implications

7. There are no anticipated negative implications for groups with protected characteristics, under the Equality Act 2010 by the approval of these proposals.

Risk Management Implications

8. Over the last decade, local authorities have received significant real terms cuts to budgets, in addition the Government's Universal Credit Scheme has posed challenges to the poorest and most vulnerable in society. Council tax benefit was a UK-wide benefit that provided support for council tax to low-income families. This was abolished in April 2013 and local authorities in England were charged with designing their own council tax support schemes in its place. Although these must maintain support for pensioners at its previous level, local authorities have wide discretion to design their own schemes for working-age

families. The Council's scheme contributes positively to our residents, meeting their needs and expectations. It also contributes to our council values most specifically being a compassionate council, so the most vulnerable among us are looked after.

Implications verified by: David Hughes, Director of Audit, Fraud, Risk and Insurance, 8 November 2024.

Climate and Ecological Emergency Implications

9. There are no anticipated climate or ecological implications as a result of the approval of this recommendation.

Consultation

10. There is no requirement to consult this year as we are not proposing any changes to our scheme.

LIST OF APPENDICES

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**London Borough of Hammersmith and
Fulham
Council Tax Reduction Scheme
2024/25**

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PART 1 - Introduction

1.– Citation, commencement, and application

- (1) This scheme may be cited as the London Borough of Hammersmith and Fulham Council Tax Reduction Scheme 2024/25 and comes into effect on 1 April 2024.
- (2) This scheme applies in relation to the billing authority in England known as the London Borough of Hammersmith and Fulham.
- (3) This Council Tax Reduction Scheme for working age applicants has been determined by the Council and is intended to assist people in financial need, by the award of a reduction in their council tax liability. It is a local scheme determined in respect of a decision made by full Council. Central Government has prescribed that the reduction given to pensioners.
- (4) The scheme in respect of pension age applicants is defined by Central Government within the following:
 - (a) Council Tax Reduction Schemes (Prescribed Requirements) (England) Regulations 2012;
 - (b) Council Tax Reduction Schemes (Prescribed Requirements and Default Scheme) (England) (Amendment) Regulations 2012;
 - (c) Council Tax Reduction Schemes (Transitional Provision) (England) Regulations 2013;
 - (d) Council Tax Reduction Schemes (Detection of Fraud and Enforcement) (England) Regulations 2013;
 - (e) Council Tax Reduction Schemes (Prescribed Requirements) (England) (Amendment) Regulations 2013;
 - (f) The Council Tax Reduction Schemes (Prescribed Requirements) (England) (Amendment) (No. 2) Regulations 2014
 - (g) The Council Tax Reduction Schemes (Prescribed Requirements) (England) (Amendment) Regulations 2015;
 - (h) The Council Tax Reduction Schemes (Prescribed Requirements) (England) (Amendment) Regulations 2016;
 - (i) The Council Tax Reduction Schemes (Amendment) (England) Regulations 2017;
 - (j) The Council Tax Reduction Schemes (Prescribed Requirements) (England) (Amendment) Regulations 2018;
 - (k) The Council Tax Reduction Schemes (Prescribed Requirements) (England) (Amendment) Regulations 2020;
 - (l) The Council Tax Reduction Schemes (Prescribed Requirements) (England) (Amendment) Regulations 2021;
 - (m) The Council Tax Reduction Schemes (Prescribed Requirements) (England) (Amendment) Regulations 2022;
 - (n) The Council Tax (Demand Notices and Reduction Schemes) (England) (amendment) Regulations 2022;
 - (o) The Council Tax Reduction Schemes (Prescribed Requirements) (England) (Amendment) Regulations 2023;
 - (p) The Council Tax Reduction Schemes (Prescribed Requirements) (England) (Amendment) Regulations 2024; and
 - (q) Local Government Finance Act 1992 (as amended by the Local Government Finance Act 2012)
- (5) Whilst the scheme for those who have reached the qualifying age for state pension credit is set by Central Government, the Council has resolved to enhance the government scheme (as defined by the Council Tax Reduction Scheme (Prescribed Requirements) (England) Regulations 2012) to disregard in full the following:
 - (a) a war disablement pension;
 - (b) a war widow's pension or war widower's pension;
 - (c) a pension payable to a person as a widow, widower or surviving civil partner under any power of Her Majesty otherwise than under an enactment to make provision about pensions for or in respect of persons who have been disabled or have died in consequence of service as members of the armed forces of the Crown;
 - (d) a guaranteed income payment;
 - (e) a payment made to compensate for the non-payment of such a pension or payment as is mentioned in any of the preceding sub-paragraphs;
 - (f) a pension paid by the government of a country outside Great Britain which is analogous to any of the pensions or payments mentioned in sub-paragraphs (a) to (d) above;
 - (g) pension paid to victims of National Socialist persecution under any special provision made by the law of the Federal Republic of Germany, or any part of it, or of the Republic of Austria.

The provisions outlined above, enhance the Central Government's scheme for Pension age applicants.

- (6) The incomes outlined within paragraph (6) shall also be disregarded in full for all persons who are not pensioners. Both this and the enhancement to the pensioner's scheme meets the authority's commitment to the Armed Forces Covenant.
- (7) Except where otherwise stated, an uprating will be applied to the Council Tax Reduction Schemes to reflect national changes to the amounts of pensions, tax credits, income related and non-income related social security benefits and allowances, component parts, applicable amounts, premiums, and deductions.

PART 2 Interpretation

2.-(1) In this scheme—

“the 1992 Act” means the Local Government Finance Act 1992;

“Abbeyfield Home” means an establishment run by the Abbeyfield Society including all bodies corporate or unincorporated which are affiliated to that society;

“adoption leave” means a period of absence from work on ordinary or additional adoption leave by virtue of section 75A or 75B of the Employment Rights Act 1996;

“adult disability payment” ;as the meaning given in regulation 2 of the DAWAP Regulations;

“an AFIP” means an armed forces independence payment payable in accordance with an armed and reserve forces compensation scheme established under section 1(2) of the Armed Forces (Pensions and Compensation) Act 2004;

“alternative maximum council tax reduction” means the amount determined in accordance with paragraph 30 and Schedule 4;

“applicable amount” means—

(a) in relation to a pensioner, the amount calculated in accordance with paragraph 24 and Schedule 2, and

(b) in relation to a person who is not a pensioner, the amount calculated in accordance with—

(i) paragraph 25 and Schedule 3; or

(ii) paragraph 27,

as the case may be;

“applicant” means a person applying for a reduction under this scheme;

“application” means an application for a reduction under this scheme;

“appropriate DWP office” means an office of the Department for Work and Pensions dealing with state pension credit or an office which is normally open to the public for the receipt of claims for income support, a jobseeker's allowance or an employment and support allowance;

“approved blood scheme” means a scheme established or approved by the Secretary of State, or trust established with funds provided by the Secretary of State, for the purpose of providing compensation in respect of a person having been infected from contaminated blood products;

“assessment period” means the period determined—

(a) in relation to pensioners—

(i) in relation to the earnings of a self-employed earner, in accordance with paragraph 42 of this scheme for the purpose of calculating the weekly earnings of the applicant;

or

(ii) in relation to any other income, in accordance with paragraph 39 of this scheme for the purpose of calculating the weekly income of the applicant;

(b) in relation to persons who are not pensioners, such period as is set out in paragraphs 46 to 48 of this scheme over which income falls to be calculated;

“attendance allowance” means—

(a) an attendance allowance under Part 3 of the SSCBA(3);

(b) an increase of disablement pension under section 104 or 105 of that Act;

(c) a payment under regulations made in exercise of the power conferred by paragraph 7(2)(b) of Part 2 of Schedule 8 to that Act;

(d) an increase of an allowance which is payable in respect of constant attendance under paragraph 4 of Part 1 of Schedule 8 to that Act;

(e) a payment by virtue of article 14, 15, 16, 43 or 44 of the Personal Injuries (Civilians) Scheme 1983 or any analogous payment; or

(f) any payment based on need for attendance which is paid as part of a war disablement pension;

“the authority” means the billing authority in whose area this scheme has effect by virtue of paragraph 4 of Schedule 1A to the 1992 Act;

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“basic rate” has the meaning given by the Income Tax Act 2007;
“the benefit Acts” means the SSCBA, the Jobseekers Act 1995, the State Pension Credit Act 2002, and the Welfare Reform Act 2007;
“board and lodging accommodation” means accommodation provided to a person or, if he is a member of a family, to him or any other member of his family, for a charge which is inclusive of the provision of that accommodation and at least some cooked or prepared meals which both are cooked or prepared (by a person other than the person to whom the accommodation is provided or a member of his family) and are consumed in that accommodation or associated premises;
“care home” has the meaning given by section 3 of the Care Standards Act 2000 and in Scotland means a care home service within the meaning given by section 2(3) of the Regulation of Care (Scotland) Act 2001 and in Northern Ireland means a nursing home within the meaning of Article 11 of the Health and Personal Social Services (Quality, Improvement and Regulation) (Northern Ireland) Order 2003 or a residential care home within the meaning of Article 10 of that Order;
“the Caxton Foundation” means the charitable trust of that name established on 28th March 2011 out of funds provided by the Secretary of State for the benefit of certain persons suffering from hepatitis C and other persons eligible for payment in accordance with its provisions;
“child” means a person under the age of 16;
“child benefit” has the meaning given by section 141 of the SSCBA;
“child disability payment” has the meaning given by regulation 2 of the DACYP Regulations;
“child care costs element” has the meaning given by regulation 27 of the Universal Credit Regulations 2012;
“child tax credit” means a child tax credit under section 8 of the Tax Credits Act 2002;
“close relative” means a parent, parent-in-law, son, son-in-law, daughter, daughter-in-law, step-parent, step-son, step-daughter, brother, sister, or if any of the preceding persons is one member of a couple, the other member of that couple;
“concessionary payment” means a payment made under arrangements made by the Secretary of State with the consent of the Treasury which is charged either to the National Insurance Fund or to a Departmental Expenditure Vote to which payments of benefit or tax credits under the benefit Acts or the Tax Credits Act 2002 are charged;
“contributory employment and support allowance” means a contributory allowance under Part 1 of the Welfare Reform Act 2007 as amended by the provisions of Schedule 3, and Part 1 of Schedule 14, to the Welfare Reform Act 2012 that remove references to an income-related allowance and a contributory allowance under Part 1 of the Welfare Reform Act 2007 as that Part has effect apart from those provisions;
“council tax benefit” means council tax benefit under Part 7 of the SSCBA;
“couple” has the meaning given by paragraph 4 of this scheme;
“DACYP Regulations” means the Disability Assistance for Children and Young People (Scotland) Regulations 2021;
“the DAWAP Regulations” means the Disability Assistance for Working Age People (Scotland) Regulations 2022;
“designated office” means the office of the authority designated by it for the receipt of applications—

- (a) by notice upon or with a form supplied by it for the purpose of making an application; or
- (b) by reference upon or with such a form to some other document available from it and sent by electronic means or otherwise on application and without charge; or
- (c) by any combination of the provisions set out in paragraphs (a) and (b);

“disability living allowance” means a disability living allowance under section 71 of the SSCBA;
“dwelling” has the meaning given by section 3 of the 1992 Act;
“earnings” has the meaning given by paragraph 40, 42, 43 or 50 of this scheme as the case may be;
“the Eileen Trust” means the charitable trust of that name established on 29th March 1993 out of funds provided by the Secretary of State for the benefit of persons eligible for payment in accordance with its provisions;
“electronic communication” has the same meaning as in section 15(1) of the Electronic Communications Act 2000;
“employed earner” is to be construed in accordance with section 2(1)(a) of the SSCBA and also includes a person who is in receipt of a payment which is payable under any enactment having effect in Northern Ireland and which corresponds to statutory sick pay or statutory maternity pay;
“the Employment, Skills and Enterprise Scheme” means a scheme under section 17A (schemes for assisting persons to obtain employment: ““work for your benefit”” schemes etc.) of the Jobseekers Act 1995 known by that name and provided pursuant to arrangements made by the Secretary of State that is designed to assist claimants for job-seekers allowance to obtain employment, including self-employment, and which may include for any individual work-related activity (including work experience or job search);

“employment zone” means an area within Great Britain designated for the purposes of section 60 of the Welfare Reform and Pensions Act 1999 and an **“employment zone programme”** means a programme established for such an area or areas designed to assist claimants for a jobseeker’s allowance to obtain sustainable employment;

“enactment” includes an enactment comprised in, or in an instrument made under, an Act of the Scottish Parliament or the National Assembly for Wales;

“extended reduction” means a reduction under this scheme for which a person is eligible under Part 12 (extended reductions);

“extended reduction period” means the period for which a person is in receipt of an extended reduction in accordance with paragraph 87, 94 or 99;

“extended reduction (qualifying contributory benefits)” means a reduction under this scheme for which a person is eligible in accordance with paragraph 87 or 98;

“family” has the meaning given by paragraph 6 of this scheme;

“the Fund” means moneys made available from time to time by the Secretary of State for the benefit of persons eligible for payment in accordance with the provisions of a scheme established by him on 24th April 1992 or, in Scotland, on 10th April 1992;

“Grenfell Tower support payment” means a payment made for the purpose of providing compensation or support in respect of the fire on 14th June 2017 at Grenfell Tower;

“guarantee credit” is to be construed in accordance with sections 1 and 2 of the State Pension Credit Act 2002;

“a guaranteed income payment” means a payment made under article 15(1)(c) (injury benefits) or 29(1)(a) (death benefits) of the Armed Forces and Reserve Forces (Compensation Scheme) Order 2011;

“historical child abuse payment” means a payment made under:

(a) Part 1 of the Historical Institutional Abuse (Northern Ireland) Act 2019;

(b) Part 4 of the Redress for Survivors (Historical Child Abuse in Care) (Scotland) Act 2021;

“the Horizon system” means any version of the computer system used by the Post Office known as Horizon, Horizon Legacy, Horizon Online or HNG-X;

“housing benefit” means housing benefit under Part 7 of the SSCBA;

“housing costs element” has the meaning given by regulation 21 of the Universal Credit Regulations 2012;

“an income-based jobseeker’s allowance” and **“a joint-claim jobseeker’s allowance”** have the meanings given by section 1(4) of the Jobseekers Act 1995;

“income-related employment and support allowance” means an income-related allowance under Part 1 of the Welfare Reform Act 2007;

“independent hospital”—

(a) in England means a hospital as defined by section 275 of the National Health Service Act 2006 that is not a health service hospital as defined by that section;

(b) in Wales has the meaning given by section 2 of the Care Standards Act 2000; and

(c) in Scotland means an independent health care service as defined by section 10F of the National Health Service (Scotland) Act 1978;

“the Independent Living Fund (2006)” means the Trust of that name established by a deed dated 10th April 2006 and made between the Secretary of State for Work and Pensions of the one part and Margaret Rosemary Cooper, Michael Beresford Boyall and Marie Theresa Martin of the other part;

“invalid carriage or other vehicle” means a vehicle propelled by a petrol engine or by electric power supplied for use on the road and to be controlled by the occupant;

“local authority” means a local authority in England within the meaning of the Local Government Act 1972

“the London Bombings Relief Charitable Fund” means the company limited by guarantee number 5505072), and registered charity of that name established on 11th July 2005 for the purpose of (amongst other things) relieving sickness, disability, or financial need of victims (including families or dependants of victims) of the terrorist attacks carried out in London on 7th July 2005;

“the London Emergencies Trust” means the company of that name (number 09928465) incorporated on 23rd December 2015 and the registered charity of that name (number 1172307) established on 28th March 2017

“lone parent” means a person who has no partner and who is responsible for and a member of the same household as a child or young person;

“the Macfarlane (Special Payments) Trust” means the trust of that name, established on 29th January 1990 partly out of funds provided by the Secretary of State, for the benefit of certain persons suffering from haemophilia;

“the Macfarlane (Special Payments) (No. 2) Trust” means the trust of that name, established on 3rd May 1991 partly out of funds provided by the Secretary of State, for the benefit of certain persons suffering from haemophilia and other beneficiaries;

“the Macfarlane Trust” means the charitable trust, established partly out of funds provided by the Secretary of State to the Haemophilia Society, for the relief of poverty or distress among those suffering from haemophilia;

“main phase employment and support allowance” means an employment and support allowance where the calculation of the amount payable in respect of the applicant includes a component under section 2(1)(b) or 4(2)(b) of the Welfare Reform Act 2007 or the applicant is a member of the work-related activity group except in Part 1 of Schedule 3;

“maternity leave” means a period during which a woman is absent from work because she is pregnant or has given birth to a child, and at the end of which she has a right to return to work either under the terms of her contract of employment or under Part 8 of the Employment Rights Act 1996;

“main phase employment and support allowance” means an employment and support allowance where the calculation of the amount payable in respect of the applicant includes a component under section 2(1)(b) or 4(2)(b) of the Welfare Reform Act 2007 or the applicant is a member of the work-related activity group except in Part 1 of Schedule 3

“member of a couple” means a member of a married or unmarried couple;

“MFET Limited” means the company limited by guarantee (number 7121661) of that name, established for the purpose in particular of making payments in accordance with arrangements made with the Secretary of State to persons who have acquired HIV as a result of treatment by the NHS with blood or blood products;

“mobility supplement” means—

(a) in relation to pensioners, a supplement to which paragraph 5(1)(a)(vi) of Schedule 5 to this scheme refers;

(b) in relation to persons who are not pensioners, a supplement to which paragraph 13 of Schedule 8 refers;

“mover” means an applicant who changes the dwelling in which the applicant is resident, and in respect of which the applicant is liable to pay council tax, from a dwelling in the area of the authority to a dwelling in the area of a second authority;

“the National Emergencies Trust” means the registered charity of that name (number 1182809) established on 28th March 2019;

“net earnings” means such earnings as are calculated in accordance with paragraph 41 or 51 of this scheme, as the case may be;

“net profit” means such profit as is calculated in accordance with paragraph 60 of this scheme;

“new dwelling” means, for the purposes of the definition of “second authority” and paragraphs 89, 96 and 101, the dwelling to which an applicant has moved, or is about to move, in which the applicant will be resident;

“non-dependant” has the meaning given by paragraph 9 of this scheme;

“occasional assistance” means any payment or provision made by a local authority, the Welsh Ministers, or the Scottish Ministers for the purposes of—

(a) meeting, or helping to meet an immediate short-term need—

- (i) arising out of an exceptional event or exceptional circumstances, or
- (ii) that needs to be met to avoid a risk to the well-being of an individual, and

(b) enabling qualifying individuals to establish or maintain a settled home, and—

(i) “local authority” has the meaning given by section 270(1) of the Local Government Act 1972; and

(ii) “qualifying individuals” means individuals who have been, or without the assistance might otherwise be—

(aa) in prison, hospital, an establishment providing residential care or other institution, or

(bb) homeless or otherwise living an unsettled way of life;

“occupational pension” means any pension or other periodical payment under an occupational pension scheme but does not include any discretionary payment out of a fund established for relieving hardship in particular cases;

“occupational pension scheme” has the same meaning as in section 1 of the Pension Schemes Act 1993;

“parental bereavement leave” means leave under section 80EA of the Employment Rights Act 1996;

“partner”, in relation to a person, means—

(a) where that person is a member of a couple, the other member of that couple; or

(b) where that person is polygamously married to two or more members of his household, any such member to whom he is married;

“**paternity leave**” means a period of absence from work on ordinary paternity leave by virtue of section 80A or 80B of the Employment Rights Act 1996 or on additional paternity leave by virtue of section 80AA or 80BB of that Act;

“**pension fund holder**” means with respect to a personal pension scheme or an occupational pension scheme, the trustees, managers, or scheme administrators, as the case may be, of the scheme concerned;

“**pensionable age**” has the meaning given by the rules in paragraph 1 of Schedule 4 to the Pensions Act 1995;

“**pensioner**” has the meaning given by paragraph 3(2)(a) of this scheme;

“**person on income support**” means a person in receipt of income support;

“**person who is not a pensioner**” has the meaning given by paragraph 3(2)(b) of this scheme;

“**persons treated as not being in Great Britain**” has the meaning given by paragraph 21 of this scheme;

“**personal independence payment**” has the meaning given by Part 4 of the Welfare Reform Act 2012;

“**personal pension scheme**” means—

(a) a personal pension scheme as defined by section 1 of the Pension Schemes Act 1993;

(b) an annuity contract or trust scheme approved under section 620 or 621 of the Income and Corporation Taxes Act 1988 or a substituted contract within the meaning of section 622(3) of that Act which is treated as having become a registered pension scheme by virtue of paragraph 1(1)(f) of Schedule 36 to the Finance Act 2004;

(c) a personal pension scheme approved under Chapter 4 of Part 14 of the Income and Corporation Taxes Act 1988 which is treated as having become a registered pension scheme by virtue of paragraph 1(1)(g) of Schedule 36 to the Finance Act 2004;

“**policy of life insurance**” means any instrument by which the payment of money is assured on death (except death by accident only) or the happening of any contingency dependent on human life, or any instrument evidencing a contract which is subject to payment of premiums for a term dependent on human life;

“**polygamous marriage**” means any marriage to which paragraph 5 of this scheme applies;

“**the Post Office**” means Post Office Limited (registered number 02154540)

“**Post Office compensation payment**” means a payment made by the Post Office or the Secretary of State for the purpose of providing compensation or support which is—

(a) in connection with the failings of the Horizon system; or

(b) otherwise, payable following the judgment in *Bates and Others v Post Office Ltd* ((No. 3) “Common Issues);

“**public authority**” includes any person certain of whose functions are functions of a public nature;

“**qualifying age for state pension credit**” means (in accordance with section 1(2)(b) and (6) of the State Pension Credit Act 2002-

(a) in the case of a woman, pensionable age; or

(b) in the case of a man, the age which is pensionable age in the case of a woman born on the same day as the man;

“**qualifying contributory benefit**” means—

(a) severe disablement allowance;

(b) incapacity benefit;

(c) contributory employment and support allowance;

“**qualifying income-related benefit**” means—

(a) income support;

(b) income-based jobseeker’s allowance;

(c) income-related employment and support allowance;

“**qualifying person**” means—

(a) a person in respect of whom a Grenfell Tower support payment has been made or payment has been made from the Fund, the Eileen Trust, MFET Limited, the Skipton Fund, the Caxton Foundation, the Scottish Infected Blood Support Scheme, an approved blood scheme, the London Emergencies Trust, the We Love Manchester Emergency Fund, Discretionary Fund, a Windrush payment, a Post Office compensation payment or a vaccine damage payment Scheme National Emergencies Trust or the London Bombings Relief Charitable Fund;

“**reduction week**” means a period of seven consecutive days beginning with a Monday and ending with a Sunday;

“**relative**” means a close relative, grandparent, grandchild, uncle, aunt, nephew, or niece;

“**relevant week**”, in relation to any particular day, means the week within which the day in question falls;

“**remunerative work**” has the meaning given by paragraph 10 of this scheme;

“**rent**” means “**eligible rent**” to which regulation 12 of the Housing Benefit (Persons who have acquired the qualifying age for state pension credit) Regulations 2006 refer, less any deductions in

respect of non-dependants which fall to be made under paragraph 29 (non-dependant deductions) of this scheme;

“**resident**” has the meaning given by Part 1 of the 1992 Act;

“**savings credit**” is to be construed in accordance with sections 1 and 3 of the State Pension Credit Act 2002;

“**the Scottish Infected Blood Support Scheme**” means the scheme of that name administered by the Common Services Agency (constituted under section 10 of the National Health Service (Scotland) Act 1978(b))

“**Scottish basic rate**” means the rate of income tax of that name calculated in accordance with section 6A of the Income Tax Act 2007;

“**Scottish taxpayer**” has the same meaning as in Chapter 2 of Part 4A of the Scotland Act 1998(f);”

“**second authority**” means the authority to which a mover is liable to make payments for the new dwelling;

“**self-employed earner**” is to be construed in accordance with section 2(1)(b) of the SSCBA;

“**self-employment route**” means assistance in pursuing self-employed earner’s employment whilst participating in—

(a) an employment zone programme;

(b) a programme provided by or under arrangements made pursuant to section 2 of the Employment and Training Act 1973 (functions of the Secretary of State) or section 2 of the Enterprise and New Towns (Scotland) Act 1990 (functions in relation to training for employment, etc.); or

(c) the Employment, Skills, and Enterprise Scheme;

“**Service User**” references in this scheme to an applicant participating as a service user are to

- a person who is being consulted by or on behalf of—
 - (i) the Secretary of State in relation to any of the Secretary of State’s functions in the field of social security or child support or under section 2 of the Employment and Training Act 1973; or
 - (ii) a body which conducts research or undertakes monitoring for the purpose of planning or improving such functions in their capacity as a person affected or potentially affected by the exercise of those functions or the carer of such a person; or the carer of a person consulted as described in sub-paragraph (a) where the carer is not being consulted as described in that sub-paragraph;

“**single applicant**” means an applicant who neither has a partner nor is a lone parent;

“**the Skipton Fund**” means the ex-gratia payment scheme administered by the Skipton Fund Limited, incorporated on 25th March 2004, for the benefit of certain persons suffering from hepatitis C and other persons eligible for payment in accordance with the scheme’s provisions;

“**sports award**” means an award made by one of the Sports Councils named in section 23(2) of the National Lottery etc. Act 1993 out of sums allocated to it for distribution under that section;

“**the SSCBA**” means the Social Security Contributions and Benefits Act 1992;

“**state pension credit**” means state pension credit under the State Pension Credit Act 2002;

“**statutory parental bereavement pay**” means a payment to which a person is entitled in accordance with section 171ZZ6 of the Social Security Contribution and Benefits Act 1992

“**tax year**” means a period beginning with 6th April in one year and ending with 5th April in the next;

“**training allowance**” means an allowance (whether by way of periodical grants or otherwise) payable—

(a) out of public funds by a Government department or by or on behalf of the Secretary of State, Skills Development Scotland, Scottish Enterprise or Highlands and Islands Enterprise, the Chief Executive of Skills Funding, or the Welsh Ministers;

(b) to a person for his maintenance or in respect of a member of his family; and

(c) for the period, or part of the period, during which he is following a course of training or instruction provided by, or in pursuance of arrangements made with, that department or approved by that department in relation to him or so provided or approved by or on behalf of the Secretary of State, Skills Development Scotland, Scottish Enterprise or Highlands and Islands Enterprise or the Welsh Ministers, but it does not include an allowance paid by any Government department to or in respect of a person by reason of the fact that he is following a course of full-time education, other than under arrangements made under section 2 of the Employment and Training Act 1973, or is training as a teacher;

“**the Trusts**” (except where the context otherwise requires) means the Macfarlane Trust, the Macfarlane (Special Payments) Trust and the Macfarlane (Special Payments) (No. 2) Trust and “**Trustees**” is to be construed accordingly;

“**universal credit**” has the meaning given by section 1 of the Welfare Reform Act 2012;

“**voluntary organisation**” means a body, other than a public or local authority, the activities of which are carried on otherwise than for profit;

“**Vaccine damage payment**” means a payment made under the Vaccine Damage Payments Act 1979;

“the Victims of Overseas Terrorism Compensation Scheme” means the scheme of that name established by the Ministry of Justice in 2012 under section 47 of the Crime and Security Act 2010

“war disablement pension” means any retired pay or pension or allowance payable in respect of disablement under an instrument specified in section 639(2) of the Income Tax (Earnings and Pensions) Act 2003;

“war pension” means a war disablement pension, a war widow’s pension, or a war widower’s pension;

“war widow’s pension” means any pension or allowance payable to a woman as a widow under an instrument specified in section 639(2) of the Income Tax (Earnings and Pensions) Act 2003 in respect of the death or disablement of any person;

“war widower’s pension” means any pension or allowance payable to a man as a widower or to a surviving civil partner under an instrument specified in section 639(2) of the Income Tax (Earnings and Pensions) Act 2003 in respect of the death or disablement of any person;

“water charges” means—

(a) as respects England and Wales, any water and sewerage charges under Chapter 1 of Part 5 of the Water Industry Act 1991,

(b) as respects Scotland, any water and sewerage charges established by Scottish Water under a charges scheme made under section 29A of the Water Industry (Scotland) Act 2002, in so far as such charges are in respect of the dwelling which a person occupies as his home;

“the We Love Manchester Emergency Fund” means the registered charity of that name (number 1173260) established on 30th May 2017;

“the Windrush Compensation Scheme” means—

(a) the scheme of that name operated by the Secretary of State for the purpose of compensating individuals who have suffered loss in connection with being unable to demonstrate their lawful status in the United Kingdom; and

(b) the policy entitled “Windrush Scheme: Support in urgent and exceptional circumstances” which was operated by the Secretary of State for the purpose of compensating individuals who, for urgent and exceptional reasons, required support in advance of the scheme referred to in paragraph (a) of this definition becoming operational;

“Windrush payment” means a payment made under the Windrush Compensation Scheme (Expenditure) Act 2020

“working tax credit” means a working tax credit under section 10 of the Tax Credits Act 2002;

“young person” means a person who falls within the definition of qualifying young person in section 142 of the SSCBA.

(2) In this scheme, where an amount is to be rounded to the nearest penny, a fraction of a penny must be disregarded if it is less than half a penny and must otherwise be treated as a whole penny.

(3) For the purpose of this scheme, a person is on an income-based jobseeker’s allowance on any day in respect of which an income-based jobseeker’s allowance is payable to him and on any day—

(a) in respect of which he satisfies the conditions for entitlement to an income-based jobseeker’s allowance but where the allowance is not paid in accordance with regulation 27A of the Jobseeker’s Allowance Regulations 1996 or section 19 or 20A or regulations made under section 17A of the Jobseekers Act 1995 (circumstances in which a jobseeker’s allowance is not payable); or

(b) which is a waiting day for the purposes of paragraph 4 of Schedule 1 to that Act and which falls immediately before a day in respect of which an income-based jobseeker’s allowance is payable to him or would be payable to him but for regulation 27A of the Jobseeker’s Allowance Regulations 1996 or section 19 or 20A or regulations made under section 17A of that Act;

(c) in respect of which he is a member of a joint-claim couple for the purposes of the Jobseekers Act 1995 and no joint-claim jobseeker’s allowance is payable in respect of that couple as a consequence of either member of that couple being subject to sanctions for the purposes of section 20A of that Act;

(d) in respect of which an income-based jobseeker’s allowance or a joint-claim jobseeker’s allowance would be payable but for a restriction imposed pursuant to section 6B, 7, 8 or 9 of the Social Security Fraud Act 2001 (loss of benefit provisions).

(4) For the purposes of this scheme, a person is on an income-related employment and support allowance on any day in respect of which an income-related employment and support allowance is payable to him and on any day—

- (a) in respect of which he satisfies the conditions for entitlement to an income-related employment and support allowance but where the allowance is not paid in accordance with section 18 of the Welfare Reform Act 2007 (disqualification); or
- (b) which is a waiting day for the purposes of paragraph 2 of Schedule 2 to that Act and which falls immediately before a day in respect of which an income-related employment and support allowance is payable to him or would be payable to him but for section 18 of that Act.

- (5) For the purposes of this scheme, two persons must be taken to be estranged only if their estrangement constitutes a breakdown of the relationship between them.
- (6) In this scheme, references to any person in receipt of state pension credit includes a person who would be in receipt of state pension credit but for regulation 13 of the State Pension Credit Regulations 2002 (small amounts of state pension credit).
- (7) In this scheme, references to any person participating as a service user are to –
- (a) a person who is being consulted by or on behalf of–
 - (i) a body which has a statutory duty to provide services in the field of health, social care, or social housing; or
 - (ii) a body which conducts research or undertakes monitoring for the purpose of planning or improving services, In their capacity as a user, potential user, carer of a user or person otherwise affected by the provision of those services;
 - (aa) a person who is being consulted by or on behalf of
 - (a) the Secretary of State in relation to any of the Secretary of State’s functions in the field of social security or child support or under section 2 of the Employment and Training Act 1973; or
 - (b) a body which conducts research or undertakes monitoring for the purpose of planning or improving such functions, in their capacity as a person affected or potentially affected by the exercise of those functions or the carer of such a person; or
- (b) the carer of a person consulted as described in sub-paragraph (a) or (aa) where the carer is not being consulted as described in that sub-paragraph.

Application of scheme: pensioners and persons who are not pensioners.

- 3 - (1) In this scheme–
- (a) a person is a “pensioner” if–
 - (i) he has attained the qualifying age for state pension credit; and
 - (ii), he is not and, if he has a partner, his partner is not–
 - (aa) a person on income support, on an income-based jobseeker’s allowance or on an income-related employment and support allowance, or
 - (bb) a person with an award of universal credit; and
 - (b) a person is a “person who is not a pensioner” if–
 - (i) he has not attained the qualifying age for state pension credit; or
 - (ii) he has attained the qualifying age for state pension credit and he, or if he has a partner, his partner, is–
 - (aa) a person on income support, on an income-based jobseeker’s allowance or on an income-related employment and support allowance, or
 - (bb) a person with an award of universal credit.
- (2) For the purposes of sub-paragraphs (a)(ii)(bb) and (b)(ii)(bb) in paragraph (1) an award of universal credit is to be disregarded during the relevant period.
- (3) In this regulation–
- “assessment period” has the same meaning as in the Universal Credit Regulations 2013;
 - “relevant period” means the period beginning with the day on which P and each partner of P has attained the qualifying age for state pension credit and ending with the day on which the last assessment period for universal credit ends.

Meaning of “couple”

- 4.-(1) In this scheme “couple” means–
- (a) a man and woman who are married to each other and are members of the same household;

- (b) a man and woman who are not married to each other but are living together as if they were a married couple or civil partners;
- (c) two people of the same sex who are civil partners of each other and are members of the same household; or
- (d) two people of the same sex who are not civil partners of each other but are living together as if they were civil partners.

(2) Two people of the same sex who are not civil partners of each other are to be regarded as living together as if they were civil partners if, but only if, they would be regarded as living together as husband and wife were they instead two people of the opposite sex.

Polygamous marriages

5.—(1) This paragraph applies to any case where—

- (a) a person is a husband or wife by virtue of a marriage entered into under a law which permits polygamy; and
- (b) either party to the marriage has for the time being any spouse additional to the other party.

(2) For the purposes of paragraph 4 neither party to the marriage is to be taken to be a member of a couple.

Meaning of “family”

- 6.—(1) In this scheme “family” means—
- (a) a couple;
 - (b) a couple and a member of the same household for whom one of them is or both are responsible and who is a child or a young person; or
 - (c) a person who is not a member of a couple and a member of the same household for whom that person is responsible and who is a child or a young person.
- (2) The references to a child or young person in sub-paragraph (1)(b) and (c) include a child or young person in respect of whom section 145A of the SSCBA applies for the purposes of entitlement to child benefit, but only for the period prescribed under section 145A(1).
- (3) The references to a young person in sub-paragraph (1)(b) and (c) do not include a young person who is—
- (a) on income support, an income-based jobseeker’s allowance or an income-related employment and support allowance, or has an award of universal credit;
 - (b) a person to whom section 6 of the Children (Leaving Care) Act 2000 (exclusion from benefits) applies;

Circumstances in which a person is to be treated as responsible or not responsible for another.

- 7.—(1) A person is to be treated as responsible for a child or young person who is normally living with him, including a child or young person to whom paragraph 6(2) applies.
- (2) Where a child or young person spends equal amounts of time in different households, or where there is a question as to which household he is living in, the child or young person must be treated for the purposes of sub-paragraph (1) as normally living with—
- (a) the person who is receiving child benefit in respect of that child or young person, or
 - (b) if there is no such person—
 - (i) where only one claim for child benefit has been made in respect of him, the person who made that claim, or
 - (ii) in any other case the person who has the primary responsibility for him.
- (3) For the purposes of this scheme a child or young person is the responsibility of only one person in any reduction week and any person other than the one treated as responsible for the child or young person under this paragraph is to be treated as not so responsible.

Households

8.—(1) Subject to sub-paragraphs (2) and (3), an applicant and any partner and, where the applicant or his partner is treated (by virtue of paragraph 7) as responsible for a child or young person, that child or young person and any child of that child or young person, are to be treated as

members of the same household notwithstanding that any of them is temporarily absent from that household.

- (2) A child or young person is not to be treated as a member of the applicant's household where he is—
- (a) placed with the applicant or his partner by a local authority under section 22C or 23(2)(a) of the Children Act 1989 or by a voluntary organisation under section 59(1)(a) of that Act, or section 81(2) of the Social Services and Well-being (Wales) Act 2014 (ways in which looked after children are to be accommodated and maintained)”;
or in Scotland boarded out with the applicant or his partner under a relevant enactment; or
 - (b) placed, or in Scotland boarded out, with the applicant or his partner prior to adoption; or
 - (c) placed for adoption with the applicant or his partner in accordance with the Adoption and Children Act 2002 or the Adoption Agencies (Scotland) Regulations 2009 or the Adoption (Northern Ireland) Order 1987.
- (3) Subject to sub-paragraph (4), sub-paragraph (1) does not apply to a child or young person who is not living with the applicant and who—
- (a) is being looked after by, or in Scotland is in the care of, a local authority under a relevant enactment; or
 - (b) has been placed, or in Scotland boarded out, with a person other than the applicant prior to adoption; or
 - (c) has been placed for adoption in accordance with the Adoption and Children Act 2002 or the Adoption Agencies (Scotland) Regulations 2009.
- (4) The authority must treat a child or young person to whom sub-paragraph (3)(a) applies as being a member of the applicant's household in any reduction week where—
- (a) that child or young person lives with the applicant for part or all of that reduction week; and
 - (b) the authority considers that it is reasonable to do so taking into account the nature and frequency of that child's or young person's visits.
- (5) In this paragraph “relevant enactment” means—
- (a) the Army Act 1955;
 - (b) the Air Force Act 1955;
 - (c) the Naval Discipline Act 1957;
 - (d) the Matrimonial Proceedings (Children) Act 1958;
 - (e) the Social Work (Scotland) Act 1968;
 - (f) the Family Law Reform Act 1969;
 - (g) the Children and Young Persons Act 1969;
 - (h) the Matrimonial Causes Act 1973;
 - (i) the Children Act 1975;
 - (j) the Domestic Proceedings and Magistrates' Courts Act 1978;
 - (k) the Adoption and Children (Scotland) Act 2007;
 - (l) the Family Law Act 1986;
 - (m) the Children Act 1989;
 - (n) the Children (Scotland) Act 1995; the Children's Hearings (Scotland) Act 2011; and;
 - (na) the Children's Hearings (Scotland) Act 2011; and
 - (o) the Legal Aid, Sentencing and Punishment of Offenders Act 2012.

Non-dependants

- 9.—(1) In this scheme, “non-dependant” means any person, except someone to whom subparagraph (2) applies, who normally resides with an applicant or with whom an applicant normally resides.
- (2) This paragraph applies to—
- (a) any member of the applicant's family;
 - (b) if the applicant is polygamously married,
 - (i) where the applicant has (alone or jointly with his partner) an award of universal credit, any—
 - (aa) party to such a marriage other than the applicant's partner; and

(bb) any child or young person who is a member of his household and for whom he or his partner or another party to the polygamous marriage is responsible; or

(ii) in any other case, any partner of his and any child or young person who is a member of his household and for whom he or one of his partners is responsible;

(c) a child or young person who is living with the applicant but who is not a member of his household by virtue of paragraph 8 (households);

(d) subject to sub-paragraph (3), any person who, with the applicant, is jointly and severally liable to pay council tax in respect of a dwelling for any day under section 6 or 7 of the 1992 Act (persons liable to pay council tax);

(e) subject to sub-paragraph (3), any person who is liable to make payments on a commercial basis to the applicant or the applicant's partner in respect of the occupation of the dwelling;

(f) a person who lives with the applicant in order to care for him or a partner of his and who is engaged by a charitable or voluntary organisation which makes a charge to the applicant or his partner for the services provided by that person.

(3) Excepting persons to whom sub-paragraph (2)(a) to (c) and (f) refer, a person to whom any of the following paragraphs applies is a non-dependant—

(a) a person who resides with the person to whom he is liable to make payments in respect of the dwelling and either—

(i) that person is a close relative of his or his partner; or

(ii) the tenancy or other agreement between them is other than on a commercial basis;

(b) a person whose liability to make payments in respect of the dwelling appears to the authority to have been created to take advantage of a council tax reduction scheme except someone who was, for any period within the eight weeks prior to the creation of the agreement giving rise to the liability to make such payments, otherwise liable to make payments of rent in respect of the same dwelling;

(c) a person who becomes jointly and severally liable with the applicant for council tax in respect of a dwelling and who was, at any time during the period of eight weeks prior to his becoming so liable, a non-dependant of one or more of the other residents in that dwelling who are so liable for the tax, unless the change giving rise to the new liability was not made to take advantage of a council tax reduction scheme.

Remunerative work

10.—(1) Subject to the following provisions of this paragraph, a person must be treated for the purposes of this scheme as engaged in remunerative work if he is engaged, or, where his hours of work fluctuate, he is engaged on average, for not less than 16 hours a week, in work for which payment is made or which is done in expectation of payment.

(2) Subject to sub-paragraph (3), in determining the number of hours for which a person is engaged in work where his hours of work fluctuate, regard must be had to the average of hours worked over—

(a) if there is a recognisable cycle of work, the period of one complete cycle (including, where the cycle involves periods in which the person does no work, those periods but disregarding any other absences);

(b) in any other case, the period of 5 weeks immediately prior to the date of claim, or such other length of time as may, in the particular case, enable the person's weekly average hours of work to be determined more accurately.

(3) Where, for the purposes of sub-paragraph (2)(a), a person's recognisable cycle of work at a school, other educational establishment or other place of employment is one year and includes periods of school holidays or similar vacations during which he does not work, those periods and any other periods not forming part of such holidays or vacations during which he is not required to work must be disregarded in establishing the average hours for which he is engaged in work.

(4) Where no recognisable cycle has been established in respect of a person's work, regard must be had to the number of hours or, where those hours will fluctuate, the average of the hours, which he is expected to work in a week.

(5) A person must be treated as engaged in remunerative work during any period for which he is absent from work referred to in sub-paragraph (1) if the absence is either without good cause or by reason of a recognised, customary, or other holiday.

- (6) A person on income support, an income-based jobseeker's allowance or an income-related employment and support allowance for more than 3 days in any reduction week is to be treated as not being in remunerative work in that week.
- (7) A person must not be treated as engaged in remunerative work on any day on which the person is on maternity leave, paternity leave, shared parental leave", parental bereavement leave or adoption leave, or is absent from work because he is ill.
- (8) A person must not be treated as engaged in remunerative work on any day on which he is engaged in an activity in respect of which—
 - (a) a sports award has been made, or is to be made, to him; and
 - (b) no other payment is made or is expected to be made to him.

PART 3 Procedural matters

Procedure for reduction applications and appeals against reduction decisions.

- 11. Schedule 1 contains provisions about the procedure—
 - (a) by which a person may apply for a reduction under this scheme;
 - (b) by which a person may make an appeal against certain decisions of the authority;
 - (c) by which a person can apply to the authority for a reduction under section 13A(1)(c) of the 1992 Act.

PART 4 Classes of person entitled to a reduction under this scheme.

- 12.—(1) The classes of person described in paragraphs 13 to 18 are entitled to a reduction under this scheme.
- (2) In those paragraphs, references to the applicant's income or capital include, in a case where that income or capital cannot accurately be determined, references to the applicant's estimated income or capital.

Class A: pensioners whose income is no greater than the applicable amount.

- 13. On any day class A consists of any person who is a pensioner—
 - (a) who is for that day liable to pay council tax in respect of a dwelling of which he is a resident;
 - (b) who, subject to paragraph 19, is not absent from the dwelling throughout the day;
 - (c) in respect of whom a maximum council tax reduction amount can be calculated;
 - (d) who does not fall within a class of person not entitled to a reduction under this scheme;
 - (e) whose income (if any) for the relevant week does not exceed his applicable amount calculated in accordance with paragraph 24 and Schedule 2, and
 - (f) who has made an application for a reduction under this scheme.

Class B: pensioners whose income is greater than the applicable amount.

- 14. On any day class B consists of any person who is a pensioner—
 - (a) who is for that day liable to pay council tax in respect of a dwelling of which he is a resident;
 - (b) who, subject to paragraph 19, is not absent from the dwelling throughout the day;
 - (c) in respect of whom a maximum council tax reduction amount can be calculated;
 - (d) who does not fall within a class of person not entitled to a reduction under this scheme;
 - (e) whose income for the relevant week is greater than his applicable amount calculated in accordance with paragraph 24 and Schedule 2;
 - (f) in respect of whom amount A exceeds amount B where—
 - (i) amount A is the maximum council tax reduction in respect of the day in the applicant's case; and
 - (ii) amount B is $2\frac{6}{7}$ per cent of the difference between his income for the relevant week and his applicable amount, and
 - (g) who has made an application for a reduction under this scheme.

Class C: alternative maximum council tax reduction - pensioners

- 15.—(1) On any day class C consists of any person who is a pensioner—
- (a) who is for that day liable to pay council tax in respect of a dwelling of which he is a resident;
 - (b) who, subject to paragraph 19, is not absent from the dwelling throughout the day;
 - (c) in respect of whom a maximum council tax reduction amount can be calculated;
 - (d) who does not fall within a class of person not entitled to a reduction under this scheme;
 - (e) who has made an application for a reduction under this scheme; and
 - (f) in relation to whom the condition in sub-paragraph (2) is met.
- (2) The condition referred to in sub-paragraph (1)(f) is that no other resident of the dwelling is liable to pay rent to the applicant in respect of the dwelling and there is an alternative maximum council tax reduction in respect of the day in the case of that person which is derived from the income, or aggregate income, of one or more residents to whom this sub-paragraph applies.
- (3) Sub-paragraph (1) applies to any other resident of the dwelling who—
- (a) is not a person who, in accordance with Schedule 1 to the 1992 Act, falls to be disregarded for the purposes of discount;
 - (b) is not a person who is liable for council tax solely in consequence of the provisions of section 9 of the 1992 Act (spouse's or civil partner's joint and several liability for tax);
 - (c) is not a person who is residing with a couple or with the members of a polygamous marriage where the applicant is a member of that couple or of that marriage and—
 - (i) in the case of a couple, neither member of that couple is a person who, in accordance with Schedule 1 to the 1992 Act, falls to be disregarded for the purposes of discount;
 - or
 - (ii) in the case of a polygamous marriage, two or more members of that marriage are not persons who, in accordance with Schedule 1 to the 1992 Act, fall to be disregarded for the purposes of discount;
 - (d) is not a person who jointly with the applicant falls within the same paragraph of section 6(2)(a) to (e) of the 1992 Act (persons liable to pay council tax) as applies in the case of the applicant; or
 - (f) is not a person who is residing with two or more persons both or all of whom fall within the same paragraph of section 6(2)(a) to (e) of the 1992 Act where two or more of those persons are not persons who, in accordance with Schedule 1 to the 1992 Act, fall to be disregarded for the purposes of discount.

Class D: persons who are not pensioners whose income is less than the applicable amount.

16. On any day class D consists of any person who is not a pensioner—
- (a) who is for that day liable to pay council tax in respect of a dwelling of which he is a resident;
 - (b) who, subject to paragraph 19, is not absent from the dwelling throughout the day;
 - (c) in respect of whom a maximum council tax reduction amount can be calculated;
 - (d) who does not fall within a class of person not entitled to a reduction under this scheme;
 - (e) whose income (if any) for the relevant week is less than his applicable amount calculated in accordance with paragraph 25 and Schedule 3, and
 - (f) who has made an application for a reduction under this scheme.

Class E: persons who are not pensioners whose income is greater than the applicable amount.

17. On any day class E consists of any person who is not a pensioner—
- (a) who is for that day liable to pay council tax in respect of a dwelling of which he is a resident;
 - (b) who, subject to paragraph 19, is not absent from the dwelling throughout the day;
 - (c) in respect of whom a maximum council tax reduction amount can be calculated;
 - (d) who does not fall within a class of person not entitled to a reduction under this scheme;
 - (e) whose income for the relevant week is greater than his applicable amount calculated in accordance with paragraph 25 and Schedule 3;
 - (f) in respect of whom amount A exceeds amount B where—
 - (i) amount A is the maximum council tax reduction in his case; and
 - (ii) amount B is 2 6/7 per cent of the difference between his income for the relevant week and his applicable amount, and
 - (g) who has made an application for a reduction under this scheme.

Class F: alternative maximum council tax reduction - persons who are not pensioners.

- 18.-(1) On any day class F consists of any person who is not a pensioner—
- (a) who is for that day liable to pay council tax in respect of a dwelling of which he is a resident;
 - (b) who, subject to paragraph 19 (periods of absence from a dwelling), is not absent from the dwelling throughout the day;
 - (c) in respect of whom a maximum council tax reduction amount can be calculated;
 - (d) who does not fall within a class of person not entitled to a reduction under this scheme;
 - (e) who has made an application; and
 - (f) in relation to whom the condition in sub-paragraph (2) is met.
- (2) The condition referred to in sub-paragraph (1)(f) is that no other resident of the dwelling is liable to pay rent to the person in question in respect of the dwelling and there is an alternative maximum council tax reduction in respect of the day in the case of that person which is derived from the income, or aggregate incomes, of one or more residents to whom this sub-paragraph applies.
- (3) Sub-paragraph (2) applies to any other resident of the dwelling who—
- (a) is not a person who, in accordance with Schedule 1 to the 1992 Act, falls to be disregarded for the purposes of discount; and
 - (b) is not a person who is liable for council tax solely in consequence of the provisions of section 9 of the 1992 Act (spouse's or civil partner's joint and several liability for tax);
 - (c) is not a person who is residing with a couple or with the members of a polygamous marriage where the applicant for the reduction is a member of that couple or of that marriage and—
 - (i) in the case of a couple, neither member of that couple is a person who, in accordance with Schedule 1 to the 1992 Act, falls to be disregarded for the purposes of discount; or
 - (ii) in the case of a polygamous marriage, two or more members of that marriage are not persons who, in accordance with Schedule 1 to the 1992 Act, fall to be disregarded for the purposes of discount;
 - (d) is not a person who jointly with the applicant for reduction falls within the same paragraph of section 6(2)(a) to (e) of the 1992 Act (persons liable to pay council tax) as applies in the case of the applicant; or
 - (e) is not a person who is residing with two or more persons both or all of whom fall within the same paragraph of section 6(2)(a) to (e) of the 1992 Act where two or more of those persons are not persons who, in accordance with Schedule 1 to the 1992 Act, fall to be disregarded for the purposes of discount.

Periods of absence from a dwelling - pensioners and persons who are not pensioners.

- 19 -(1) A person is not absent from a dwelling in relation to any day which falls within a period of temporary absence from that dwelling.
- (2) In sub-paragraph (1), a “period of temporary absence” means—
- (a) a period of absence not exceeding 13 weeks, beginning with the first whole day on which a person resides in residential accommodation in Great Britain where and for so long as—
 - (i) the person resides in that accommodation;
 - (ii) the part of the dwelling in which he usually resided is not let or sub-let; and
 - (iii) that period of absence does not form part of a longer period of absence from the dwelling of more than 52 weeks, where he has entered the accommodation for the purpose of ascertaining whether it suits his needs and with the intention of returning to the dwelling if it proves not to suit his needs;
 - (b) subject to sub-paragraph (2B), a period of absence within Great Britain not exceeding 13 weeks, beginning with the first whole day of absence from the dwelling, where and for so long as—
 - (i) the person intends to return to the dwelling;
 - (ii) the part of the dwelling in which he usually resided is not let or sub-let; and
 - (iii) that period is unlikely to exceed 13 weeks;
 - (c) a period of absence not exceeding 52 weeks, beginning with the first whole day of that absence, where and for so long as—
 - (i) the person intends to return to the dwelling;
 - (ii) the part of the dwelling in which he usually resided is not let or sub-let;
 - (iii) the person is a person to whom sub-paragraph (3) applies; and

(iv) subject to sub-paragraph (2D), a period of absence within Great Britain is unlikely to exceed 52 weeks or, in exceptional circumstances, is unlikely substantially to exceed that period and;

(d) subject to sub-paragraphs (2F), (3C), (3E) and (3G) and where sub-paragraph (2E) applies, a period of absence outside Great Britain not exceeding 4 weeks, beginning with the first day of that absence from Great Britain where and for so long as— (i) the person intends to return to the dwelling; (ii) the part of the dwelling in which he usually resides is not let or sub-let; and (iii) the period of absence from Great Britain is unlikely to exceed 4 weeks;

(2A) The period of 13 weeks referred to in sub-paragraph (2)(b) shall run or continue to run during any period of absence from Great Britain.

(2B) Where—

(a) a person returns to Great Britain after a period of absence from Great Britain (period A);
(b) that person has been absent from the dwelling, including any absence within Great Britain, for less than 13 weeks beginning with the first day of absence from that dwelling; and

(c) at the outset of, or during, period A, period A ceased to be treated as a period of temporary absence,
then any day that follows period A and precedes the person's return to the dwelling, shall not be treated as a period of temporary absence under sub-paragraph (2)(b).

(2C) The period of 52 weeks referred to in sub-paragraph (2)(c) shall run or continue to run during any period of absence from Great Britain.

(2D) Where —

1. a person returns to Great Britain after a period of absence from Great Britain (period A);
2. that person has been absent from the dwelling, including any absence within Great Britain, for less than 52 weeks beginning with the first day of absence from that dwelling; and
3. at the outset of, or during, period A, period A ceased to be treated as a period of temporary absence,
then, any day that follows period A and precedes the person's return to the dwelling, shall not be treated as a period of temporary absence under sub-paragraph (2)(c).

(2E) This sub-paragraph applies where—

1. a person is temporarily absent from Great Britain;
2. immediately before that period of absence from Great Britain, the person was not absent from the dwelling.

(2F) If the temporary absence referred to in sub-paragraph (2)(d) is in connection with the death of—

1. the person's partner or a child or young person for whom the person or the person's partner is responsible;
2. the person's close relative;
3. the close relative of the person's partner; or
4. the close relative of a child or young person for whom the person or the person's partner is responsible,

then the period of 4 weeks in the opening words of sub-paragraph (2)(d) may be extended by up to 4 further weeks if the relevant authority considers it unreasonable to expect the person to return to Great Britain within the first 4 weeks (and the reference in subparagraph (iii) of that paragraph to a period of 4 weeks shall, where the period is extended, be taken as referring to the period as so extended).”;

(3) This sub-paragraph applies to a person who—

- (a) is a person to whom sub-paragraph (3A) applies;
 - (i) in a dwelling, other than the dwelling referred to in sub-paragraph (1), or
 - (ii) in premises approved under section 13 of the Offender Management Act 2007, or is detained in custody pending sentence upon conviction;
- (b) is resident in a hospital or similar institution as a patient;
- (c) is undergoing, or whose partner or dependent child is undergoing medical treatment, or medically approved convalescence, in accommodation other than residential accommodation;
- (d) is following a training course;
- (e) is undertaking medically approved care of a person;

- (f) is undertaking the care of a child whose parent or guardian is temporarily absent from the dwelling normally occupied by that parent or guardian for the purpose of receiving medically approved care or medical treatment;
- (g) is receiving medically approved care provided in accommodation other than residential accommodation;
- (h) is a student;
- (i) is receiving care provided in residential accommodation and is not a person to whom subparagraph (2)(a) applies; or
- (j) has left the dwelling he resides in through fear of violence, in that dwelling, or by a person who was formerly a member of the family of the person first mentioned.

- (3A) This sub-paragraph applies to a person (“P”) who is—
- (a) detained in custody on remand pending trial;
 - (b) detained pending sentence upon conviction; or
 - (c) as a condition of bail required to reside—
 - (i) in a dwelling, other than a dwelling P occupies as P’s home; or
 - (ii) in premises approved under section 13 of the Offender Management Act 2007(a), and who is not also detained in custody following sentence upon conviction.
- (3B) This sub-paragraph applies where—
- (a) a person is temporarily absent from Great Britain;
 - (b) the person is a member of Her Majesty’s forces posted overseas, a mariner or a continental shelf worker;
 - (c) immediately before that period of absence from Great Britain, the person was not absent from the dwelling.
- (3C) Where sub-paragraph (3B) applies, a period of absence from Great Britain not exceeding 26 weeks, beginning with the first day of absence from Great Britain, shall be treated as a period of temporary absence where and for so long as—
- (a) the person intends to return to the dwelling;
 - (b) the part of the dwelling in which he usually resided is not let or sub-let;
 - (c) the period of absence from Great Britain is unlikely to exceed 26 weeks.
- (3D) This sub-paragraph applies where—
- (a) a person is temporarily absent from Great Britain;
 - (b) the person is a person described in any of paragraphs (b), (c), (g) or (j) of subparagraph (3);
 - (c) immediately before that period of absence from Great Britain, the person was not absent from the dwelling.
- (3E) Where sub-paragraph (3D) applies, a period of absence from Great Britain not exceeding 26 weeks, beginning with the first day of absence from Great Britain, shall be treated as a period of temporary absence where and for so long as—
- (a) the person intends to return to the dwelling;
 - (b) the part of the dwelling in which he usually resided is not let or sub-let;
 - (c) the period of absence is unlikely to exceed 26 weeks, or in exceptional circumstances, is unlikely substantially to exceed that period.
- (3F) This sub-paragraph applies where—
- (a) a person is temporarily absent from Great Britain;
 - (b) the person is a person described in any of paragraphs (a), (d), (e), (f), (h) or (i) of subparagraph (3);
 - (c) immediately before that period of absence from Great Britain, the person was not absent from the dwelling.
- (3G) Where sub-paragraph (3F) applies, a period of absence from Great Britain not exceeding 4 weeks, beginning with the first day of absence from Great Britain, shall be treated as a period of temporary absence where and for so long as—
- (a) the person intends to return to the dwelling;
 - (b) the part of the dwelling in which he usually resided is not let or sub-let;
 - (c) the period of absence is unlikely to exceed 4 weeks, or in exceptional circumstances, is unlikely substantially to exceed that period.
- (4) This sub-paragraph applies to a person who is—

- (a) detained in custody pending sentence upon conviction or under a sentence imposed by a court (other than a person who is detained in hospital under the provisions of the Mental Health Act 1983, or, in Scotland, under the provisions of the Mental Health (Care and Treatment) (Scotland) Act 2003 or the Criminal Procedure (Scotland) Act 1995; and
- (b) on temporary release from detention in accordance with Rules made under the provisions of the Prison Act 1952 or the Prisons (Scotland) Act 1989.

- (5) Where sub-paragraph (4) applies to a person, then, for any day when he is on temporary release—
- (a) if such temporary release was immediately preceded by a period of temporary absence under sub-paragraph (2)(b) or (c), he must be treated, for the purposes of sub-paragraph (1), as if he continues to be absent from the dwelling, despite any return to the dwelling;
 - (b) for the purposes of sub-paragraph (3)(a), he must be treated as if he remains in detention;
 - (c) if he does not fall within paragraph (a), he is not to be considered to be a person who is liable to pay council tax in respect of a dwelling of which he is a resident.

- (6) In this paragraph—

““continental shelf worker” means a person who is employed, whether under a contract of service or not, in a designated area or a prescribed area in connection with any of the activities mentioned in section 11(2) of the Petroleum Act 1998(a);

“designated area” means any area which may from time to time be designated by Order in Council under the Continental Shelf Act 1964(b) as an area within which the rights of the United Kingdom with respect to the seabed and subsoil and their natural resources may be exercised;

“mariner” means a person who is employed under a contract of service either as a master or member of the crew of any ship or vessel, or in any other capacity on board any ship or vessel, where—

- (a) the employment in that capacity is for the purposes of that ship or vessel or its crew or any passengers or cargo or mails carried by the ship or vessel; and
- (b) the contract is entered into in the United Kingdom with a view to its performance (in whole or in part) while the ship or vessel is on its voyage;

“medically approved” means certified by a medical practitioner;

member of Her Majesty’s forces posted overseas” means a person who is a member of the regular forces or the reserve forces (within the meaning of section 374 of the Armed Forces Act 2006(c)), who is absent from the main dwelling because the person has been posted outside of Great Britain to perform the duties of a member of Her Majesty’s regular forces or reserve forces;” and

“patient” means a person who is undergoing medical or other treatment as an in-patient in any hospital or similar institution;

“prescribed area” means any area over which Norway or any member State (other than the United Kingdom) exercises sovereign rights for the purpose of exploring the seabed and subsoil and exploiting their natural resources, being an area outside the territorial seas of Norway or such member State, or any other area which is from time to time specified under section 10(8) of the Petroleum Act 1998;

“residential accommodation” means accommodation which is provided in—

- (a) a care home;
- (b) an independent hospital;
- (c) an Abbeyfield Home; or
- (d) an establishment managed or provided by a body incorporated by Royal Charter or constituted by Act of Parliament other than a local social services authority;

“training course” means a course of training or instruction provided wholly or partly by or on behalf of or in pursuance of arrangements made with, or approved by or on behalf of, Skills Development Scotland, Scottish Enterprise, Highlands and Islands Enterprise, a government department, or the Secretary of State.

Transitional provision

- 19A** (1) Subject to paragraph (2), the amendments made by regulation 2(3)(a), shall not apply in respect of a person who is temporarily absent from Great Britain on 1st April 2017 until the day that person returns to Great Britain.

- (2) Paragraph (1) does not apply to a person who, on 1st April 2017, is temporarily absent from Great Britain and is—

- (a) a member of Her Majesty’s forces posted overseas;
- (b) absent in the capacity of a continental shelf worker; or

(c) absent in the capacity of a mariner.

(3) In this regulation—

“continental shelf worker” means a person who is employed, whether under a contract of service or not, in a designated area or a prescribed area in connection with any of the activities mentioned in section 11(2) of the Petroleum Act 1998;

“designated area” means any area which may from time to time be designated by Order in Council under the Continental Shelf Act 1964 as an area within which the rights of the United Kingdom with respect to the seabed and subsoil and their natural resources may be exercised;

“mariner” means a person who is employed under a contract of service either as a master or member of the crew of any ship or vessel, or in any other capacity on board any ship or vessel, where—

(a) the employment in that capacity is for the purposes of that ship or vessel or its crew or any passengers or cargo or mails carried by the ship or vessel; and

(b) the contract is entered into in the United Kingdom with a view to its performance (in whole or in part) while the ship or vessel is on its voyage;

“member of Her Majesty’s forces posted overseas” means a person who is a member of the regular forces or the reserve forces (within the meaning of section 374 of the Armed Forces Act 2006), who is absent from the dwelling that the person normally occupies as his home because the person has been posted outside of Great Britain to perform the duties of a member of Her Majesty’s regular forces or reserve forces; and

“prescribed area” means any area over which Norway or any member State (other than the United Kingdom) exercises sovereign rights for the purpose of exploring the seabed and subsoil and exploiting their natural resources, being an area outside the territorial seas of Norway or such member State, or any other area which is from time to time specified under section 10(8) of the Petroleum Act 1998.

PART 5 Classes of person excluded from this scheme.

Classes of person excluded from this scheme.

20. The classes of person described in paragraphs 21 to 24 are not entitled to a reduction under this scheme.

Class of person excluded from this scheme: persons treated as not being in Great Britain

21.—(1) The class of person described in this paragraph consists of any person treated as not being in Great Britain.

(2) Except where a person falls within sub-paragraph (5) or (6), a person is to be treated as not being in Great Britain if the person is not habitually resident in the United Kingdom, the Channel Islands, the Isle of Man, or the Republic of Ireland.

(3) A person must not be treated as habitually resident in the United Kingdom, the Channel Islands, the Isle of Man, or the Republic of Ireland unless the person has a right to reside in one of those places.

(4) For the purposes of sub-paragraph (3), a right to reside does not include a right which exists by virtue of, or in accordance with—

(a) regulation 13 of the EEA Regulations;

(aa) regulation 14 of the EEA Regulations but only in a case where the right exists under that regulation where the person is -

(i) a jobseeker for the purpose of the definition of a ‘qualified person’ in regulation 6(1) of those regulations, or,

(ii) a family member (within the meaning of regulation 7 of those regulations) of such a jobseeker

(b) regulation 16 of the EEA Regulations, but only in a case where the right exists under that regulation because the applicant satisfies the criteria in paragraph 5 of that regulation.

(4A) For the purposes of paragraph (3), a right to reside does not include a right which exists by virtue of a person having been granted limited leave to enter, or remain in, the United Kingdom under the Immigration Act 1971 by virtue of—

(a) (removed)

(b) Appendix EU to the immigration rules made under section 3(2) of that Act;

- (c) being a person with a Zambrano right to reside as defined in Annex 1 of Appendix EU to the immigration rules made under section 3(2) of that Act; or
- (d) having arrived in the United Kingdom with an entry clearance that was granted under Appendix EU (Family Permit) to the immigration rules made under section 3(2) of that Act;

“(4B) Paragraph (4A)(b) does not apply to a person who—

- (a) has a right to reside granted by virtue of being a family member of a relevant person of Northern Ireland; and
- (b) would have a right to reside under the EEA Regulations(6) if the relevant person of Northern Ireland were an EEA national, provided that the right to reside does not fall within paragraph (4)(a) or (b);

(5) A person falls within this sub-paragraph if the person is—

- (za) a person granted leave in accordance with the immigration rules made under section 3(2) of the Immigration Act 1971, where such leave is granted by virtue of—
 - (i) the Afghan Relocations and Assistance Policy; or
 - (ii) the previous scheme for locally employed staff in Afghanistan (sometimes referred to as the ex-gratia scheme);
- (zb) a person in Great Britain not coming within sub-paragraph (za) or (e) who left Afghanistan in connection with the collapse of the Afghan government that took place on 15th August 2021;
- (zc) a person in Great Britain who was residing in Ukraine immediately before 1st January 2022, left Ukraine in connection with the Russian invasion which took place on 24th February 2022 and—
 - (i) has been granted leave in accordance with immigration rules made under section 3(2) of the Immigration Act 1971;
 - (ii) has a right of abode in the United Kingdom within the meaning given in section 2 of that Act; or
 - (iii) does not require leave to enter or remain in the United Kingdom in accordance with section 3ZA of that Act;
- (zd) a person who was residing in Israel, the West Bank, the Gaza Strip, East Jerusalem, the Golan Heights, or Lebanon immediately before 7th October 2023, left Israel, the West Bank, the Gaza Strip, East Jerusalem, the Golan Heights, or Lebanon in connection with the Hamas terrorist attack in Israel on 7th October 2023 or the violence which rapidly escalated in the region following the attack and—
 - (i) has been granted leave in accordance with immigration rules made under section 3(2) of the Immigration Act 1971,
 - (ii) has a right of abode in the United Kingdom within the meaning given in section 2 of that Act, or
 - (iii) does not require leave to enter or remain in the United Kingdom in accordance with section 3ZA of that Act;
- (ze) a person who was residing in Sudan before 15th April 2023, left Sudan in connection with the violence which rapidly escalated on 15th April 2023 in Khartoum and across Sudan and—
 - (i) has been granted leave in accordance with immigration rules made under section 3(2) of the Immigration Act 1971;
 - (ii) has a right of abode in the United Kingdom within the meaning given in section 2 of that Act; or
 - (iii) does not require leave to enter or remain in the United Kingdom in accordance with section 3ZA of that Act
- (a) a qualified person for the purposes of regulation 6 of the EEA Regulations as a worker or a self-employed person;
- (b) a family member of a person referred to in sub-paragraph (a);
- (c) a person who has a right to reside permanently in the United Kingdom by virtue of regulation 15(1)(c), (d) or (e) of the EEA Regulations;
- (ca) a family member of a relevant person of Northern Ireland, with a right to reside which falls within paragraph (4A)(b), provided that the relevant person of Northern Ireland falls within paragraph (5)(a), or would do so but for the fact that they are not an EEA national;
- (cb) a frontier worker within the meaning of regulation 3 of the Citizens’ Rights (Frontier Workers) (EU Exit) Regulations 2020;
- (cc) a family member of a person referred to in sub-paragraph (cb), who has been granted limited leave to enter, or remain in, the United Kingdom by virtue of Appendix EU to the immigration rules made under section 3(2) of the Immigration Act 1971

- (d) a person recorded by the Secretary of State as a refugee within the definition in Article 1 of the Convention relating to the Status of Refugees done at Geneva on 28th July 1951, as extended by Article 1(2) of the Protocol relating to the Status of Refugees done at New York on 31st January 1967;
- (e) a person who has been granted, or who is deemed to have been granted, leave outside the rules made under section 3(2) of the Immigration Act 1971
- (f) a person who has humanitarian protection granted under those rules;
- (g) a person who is not a person subject to immigration control within the meaning of section 115(9) of the Immigration and Asylum Act 1999 and who is in the United Kingdom as a result of his deportation, expulsion, or other removal by compulsion of law from another country to the United Kingdom;
- (h) in receipt of income support or on an income-related employment and support allowance; or
- (ha) in receipt of an income-based jobseeker's allowance and has a right to reside other than a right to reside falling within paragraph (4)

(6) A person falls within this sub-paragraph if the person is a Crown servant or member of Her Majesty's forces posted overseas.

(7) A person mentioned in sub-paragraph (6) is posted overseas if the person is performing overseas the duties of a Crown servant or member of Her Majesty's forces and was, immediately before the posting or the first of consecutive postings, habitually resident in the United Kingdom.

(8) In this paragraph—

“claim for asylum” has the same meaning as in section 94(1) of the Immigration and Asylum Act 1999;

“EEA Regulations” means the Immigration (European Economic Area) Regulations 2016 and references to the EEA Regulations are to be read with Schedule 4 to the Immigration and Social Security Co-ordination (EU Withdrawal) Act 2020 (Consequential, Saving, Transitional and Transitory Provisions) Regulations 2020;

“EEA national” has the meaning given in regulation 2(1) of the EEA Regulations;”;

“family member” has the meaning given in regulation 7(1)(a), (b) or (c) of the EEA Regulations, except that regulation 7(4) of the EEA Regulations does not apply for the purposes of paragraphs (4B) and (5)(ca);”;

“relevant person of Northern Ireland” has the meaning given in Annex 1 of Appendix EU to the immigration rules made under section 3(2) of the Immigration Act 1971.

Class of person excluded from this scheme: persons subject to immigration control.

22.—(1) Persons subject to immigration control are not entitled to a reduction under this scheme.

(2) “Person subject to immigration control” has the meaning given in section 115(9) of the Immigration and Asylum Act 1999.

(2A) A person who is a national of a state which has ratified the European Convention on Social and Medical Assistance (done in Paris on 11th December 1953) or a state which has ratified the Council of Europe Social Charter (signed in Turin on 18th October 1961) and who is lawfully present in the United Kingdom and is not a person subject to immigration control for the purpose of paragraph (1)dc

Class of person excluded from this scheme: capital limit.

23.—(1) The class of person described in this paragraph consists of any person whose capital exceeds £16,000.

(2) Capital for the purposes of sub-paragraph (1) is to be calculated in accordance with Part 10 of this scheme.

Class of person excluded from this scheme: students.

24. The class of person described in this paragraph consists of any student to whom paragraph 75(1) applies (except to the extent that a student may be entitled to an alternative maximum council tax reduction by virtue of paragraph 18).

PART 6 Applicable amounts

Applicable amounts: pensioners

- 25.- (1) The applicable amount for a pensioner for a week is the aggregate of such of the following amounts as apply in his case—
- (a) an amount in respect of his personal allowance, determined in accordance with paragraph 1 of Schedule 2 (personal allowance);
 - (b) an amount determined in accordance with paragraph 2 of that Schedule in respect of up to two individuals who are either children or young persons and who are members of his family.
 - (c) if he is a member of a family of which at least one member is a child or young person, an amount determined in accordance with paragraph 3 of that Schedule (family premium);
 - (d) the amount of any premiums which may be applicable to him, determined in accordance with Parts 3 and 4 of that Schedule (premiums).
- (1A) For the purposes of sub-paragraph (1)(b) as it applies apart from sub-paragraph (1C), where the family includes more than two individuals who are either children or young persons and under paragraph 2 of that Schedule a different amount applies to different individuals, the two amounts to be included in the applicable amount shall be those that result in the greatest possible total amount.
- (1B) Sub-paragraph (1C) applies where—
- (a) (whether or not as part of a tax credit couple as defined in section 3(5A) of the Tax Credits Act 2002) the applicant has an award of child tax credit (whether or not any amount is payable by way of such credit) in respect of a child or young person who is a member of his family; and
 - (b) the total amount to be included in the applicable amount under sub-paragraph (1)(b) as substituted by sub-paragraph (1C) would be higher than the total amount that would be included under paragraph (1)(b) apart from sub-paragraph (1C).
- (1C) Where this paragraph applies, for sub-paragraph (1)(b) substitute—
- (b) an amount determined in accordance with paragraph 2 of that Schedule in respect of any child or young person who is a member of his family and in respect of whom the individual element of child tax credit has been included in the determination of the maximum rate of that credit;”
- (2) In Schedule 2—
- “additional spouse” means a spouse of either party to the marriage who is additional to the other party to the marriage;
- “patient” means a person (other than a person who is serving a sentence of imprisonment or detention in a youth custody institution) who is regarded as receiving free in-patient treatment within the meaning of regulation 2(4) and (5) of the Social Security (Hospital In-Patients) Regulations 2005

Applicable amounts: persons who are not pensioners.

- 26.—(1) Subject to paragraphs 27 and 28, the applicable amount for a week for a person who is not a pensioner is the aggregate of such of the following amounts as may apply in his case—
- (a) an amount in respect of himself or, if he is a member of a couple, an amount in respect of both of them, determined in accordance with paragraph 1 of Schedule 3;
 - (b) an amount in respect of any child or young person who is a member of his family, determined in accordance with paragraph 3 of that Schedule;
 - (c) if he is a member of a family of which at least one member is a child or young person, an amount determined in accordance with Part 2 of that Schedule (family premium);
 - (d) the amount of any premiums which may be applicable to him, determined in accordance with Parts 3 and 4 of that Schedule (premiums);
 - (e) the amount of either the—
 - (i) work-related activity component; or

- (ii) support component,
- (f) which may be applicable to him in accordance with Parts 5 and 6 of that Schedule (the components));
- (g) the amount of any transitional addition which may be applicable to him in accordance with Parts 7 and 8 of that Schedule (transitional addition).

(2) In Schedule 2–

“additional spouse” means a spouse of either party to the marriage who is additional to the other party to the marriage;

“patient” means a person (other than a person who is serving a sentence of imprisonment or detention in a youth custody institution) who is regarded as receiving free in-patient treatment within the meaning of regulation 2(4) and (5) of the Social Security (Hospital In-Patients) Regulations 2005

(3) In Schedule 3–

“additional spouse” means a spouse by the party to the marriage who is additional to the party to the marriage;

“converted employment and support allowance” means an employment and support allowance which is not income-related and to which a person is entitled as a result of a conversion decision within the meaning of the Employment and Support Allowance (Existing Awards) Regulations 2008;

“patient” means a person (other than a person who is serving a sentence of imprisonment or detention in a youth custody institution) who is regarded as receiving free in-patient treatment within the meaning of regulation 2(4) and (5) of the Social Security (Hospital In-Patients) Regulations 2005.

Polygamous marriages: persons who are not pensioners.

27.–(1) This paragraph applies where an applicant who is not a pensioner is a member of a polygamous marriage and does not have (alone or jointly with a party to a marriage), an award of universal credit.

(2) The applicable amount for a week of an applicant where this paragraph applies is the aggregate of such of the following amounts as may apply in his case–

- (a) the amount applicable to him and one of his partners determined in accordance with paragraph 1(3) of Schedule 3 as if he and that partner were a couple;
- (b) an amount equal to the difference between the amounts specified in sub-paragraphs (3) and (1)(b) of paragraph 1 of that Schedule in respect of each of his other partners;
- (c) an amount determined in accordance with paragraph 2 of that Schedule (main phase employment and support allowance) in respect of any child or young person for whom he or a partner of his is responsible and who is a member of the same household;
- (d) if he or another partner of the polygamous marriage is responsible for a child or young person who is a member of the same household, the amount specified in Part 2 of that Schedule (family premium);
- (e) the amount of any premiums which may be applicable to him determined in accordance with Parts 3 and 4 of that Schedule (premiums);
- (f) the amount of either the–
 - a. (i) work-related activity component; or
 - b. (ii) support component,
 which may be applicable to him in accordance with Parts 5 and 6 of that Schedule (the components);
- (g) the amount of any transitional addition which may be applicable to him in accordance with Parts 7 and 8 of that Schedule (transitional addition).

Applicable amount: persons who are not pensioners who have an award of universal credit.

28.–(1) Subject to sub-paragraph (2), in determining the applicable amount for a week of an applicant who is not a pensioner–

- (a) who has, or
- (b) who (jointly with his partner) has,

an award of universal credit, the authority must use the calculation or estimate of the maximum amount of the applicant, or the applicant and his partner jointly (as the case may be), subject to the adjustment described in sub-paragraph (3).

- (2) In determining the applicable amount for a week of an applicant who is a member of a polygamous marriage, the fact that two people are husband and wife is to be disregarded if—
 - (a) one of them is a party to an earlier marriage that still subsists; and
 - (b) the other party to that earlier marriage is living in the same household.
- (3) The adjustment referred to in sub-paragraph (1) is to multiply the maximum amount by 12 and divide the product by 52.
- (4) In this paragraph “maximum amount” means the maximum amount calculated by the Secretary of State in accordance with section 8(2) of the Welfare Reform Act 2012.

PART 7 Maximum council tax reduction for the purposes of calculating eligibility for a reduction under this scheme and amount of reduction.

Maximum council tax reduction amount under this scheme: pensioners and persons who are not pensioners.

- 29.—(1) Subject to sub-paragraphs (2) to (4), the maximum council tax reduction payable to a pensioner in respect of a day is 100 per cent of the amount A/B where—
- (a) A is the amount set by the authority as the council tax for the relevant financial year in respect of the dwelling in which he is a resident and for which he is liable, subject to any discount which may be appropriate to that dwelling under the 1992 Act; and
 - (b) B is the number of days in that financial year less any deductions in respect of non-dependants which fall to be made under paragraph 29 (non-dependant deductions: pensioners and persons who are not pensioners).
- (2) In calculating a person’s maximum council tax reduction under this scheme any support in the amount that person is liable to pay in respect of council tax, which is made in consequence of any enactment in, or made under, the 1992 Act (other than a support under this scheme), is to be taken into account.
 - (3) Subject to sub-paragraph (5), where an applicant is jointly and severally liable for council tax in respect of a dwelling in which he is resident with one or more other persons, in determining the maximum council tax reduction in his case in accordance with sub-paragraph (1), the amount A is to be divided by the number of persons who are jointly and severally liable for that tax.
 - (4) Where an applicant is jointly and severally liable for council tax in respect of a dwelling with only his partner, sub-paragraph (4) does not apply in his case.
 - (5) The reference in sub-paragraph (4) to a person with whom an applicant is jointly and severally liable for council tax does not include a student to whom paragraph 73(2) applies.
 - (6) In this paragraph “relevant financial year” means, in relation to any particular day, the financial year within which the day in question falls.

Non-dependant deductions: pensioners and persons who are not pensioners.

- 30.—(1) Subject to the following provisions of this paragraph, the non-dependant deductions in respect of a day referred to in section 29 (maximum council tax reduction) shall be;
- (a) in respect of a non-dependant aged 18 or over in remunerative work, $£15.10 \times 1/7$;
 - (b) in respect of a non-dependant aged 18 or over to whom sub-paragraph (a) does not apply, $£4.90 \times 1/7$.
- (2) In the case of a non-dependant aged 18 or over to whom paragraph 30.1(a) applies, where it is shown to the appropriate authority that his normal gross weekly income is—
 - (a) less than £256.00, the deduction to be made under this paragraph shall be that specified in paragraph 30.1(b);
 - (b) not less than £256.00, but less than £445.00, the deduction to be made under this section shall be $£10.05 \times 1/7$;
 - (c) not less than £445.00, but less than £554.00, the deduction to be made under this section

shall be £12.60 x 1/7.

- (3) Only one deduction is to be made under this paragraph in respect of a couple or, as the case may be, members of a polygamous marriage (other than where there is an award of universal credit) and, where, but for this paragraph, the amount that would fall to be deducted in respect of one member of a couple or polygamous marriage is higher than the amount (if any) that would fall to be deducted in respect of the other, or any other, member, the higher amount is to be deducted.
- (4) In applying the provisions of sub-paragraph (2) in the case of a couple or, as the case may be, a polygamous marriage, regard must be had, for the purpose of that sub-paragraph, to the couple's or, as the case may be, all members of the polygamous marriage's joint weekly gross income.
- (5) Where in respect of a day—
 - (a) a person is a resident in a dwelling but is not himself liable for council tax in respect of that dwelling and that day;
 - (b) other residents in that dwelling (the liable persons) have joint and several liability for council tax in respect of that dwelling and that day otherwise than by virtue of section 9 of the 1992 Act (liability of spouses and civil partners); and
 - (c) the person to whom paragraph (a) refers is a non-dependent of two or more of the liable persons, the deduction in respect of that non-dependent must be apportioned equally between those liable persons.
- (6) No deduction is to be made in respect of any non-dependants occupying an applicant's dwelling if the applicant or his partner is—
 - (a) blind or treated as blind by virtue of paragraph 10 of Schedule 3 (additional condition for the disability premium); or
 - (b) receiving in respect of himself—
 - (i) attendance allowance, or would be receiving that allowance but for—
 - (aa) a suspension of benefit in accordance with regulations under section 113(2) of the SSCBA; or
 - (bb) an abatement as a result of hospitalisation; or
 - (ii) the care component of the disability living allowance, or would be receiving that component but for—
 - (aa) a suspension of benefit in accordance with regulations under section 113(2) of the SSCBA; or
 - (bb) an abatement as a result of hospitalisation; or
 - (iii) the daily living component of personal independence payment, or would be receiving that allowance but for a suspension of benefit in accordance with regulations under section 86 of the Welfare Reform Act 2012 (hospital in-patients); or
 - (iv) an AFIP or would be receiving that payment but for a suspension of it in accordance with any terms of the armed and reserve forces compensation scheme which allows for a suspension because a person is undergoing medical treatment in a hospital or similar institution.
- (7) No deduction is to be made in respect of a non-dependent if—
 - (a) although he resides with the applicant, it appears to the authority that his normal home is elsewhere; or
 - (b) he is in receipt of a training allowance paid in connection with youth training established under section 2 of the Employment and Training Act 1973 or section 2 of the Enterprise and New Towns (Scotland) Act 1990; or
 - (c) he is a full-time student within the meaning of Part 11 (students); or
 - (d) he is not residing with the applicant because he has been a patient for a period in excess of 52 weeks, and for these purposes—
 - (i) "patient" has the meaning given in paragraph 19(6), and
 - (ii) where a person has been a patient for two or more distinct periods separated by one or more intervals each not exceeding 28 days, he is to be treated as having been a patient continuously for a period equal in duration to the total of those distinct periods.
- (8) No deduction is to be made in respect of a non-dependent—
 - (a) who is on income support, state pension credit, an income-based jobseeker's allowance or an income-related employment and support allowance?

- (b) to whom Schedule 1 to the 1992 Act applies (persons disregarded for purposes of discount) but this paragraph does not apply to a non-dependent who is a student to whom paragraph 4 of that Schedule refers, or
- (c) is entitled to an award of Universal Credit where the award is calculated on the basis that the person does not have any earned income.

- (9) In the application of sub-paragraph (2) there is to be disregarded from the non-dependent's weekly gross income—
- (a) any attendance allowance, disability living allowance, personal independence payment or an AFIP received by him;
 - (b) any payment made under or by the Trusts, the Fund, the Eileen Trust, MFET Limited, the Skipton Fund, the Caxton Foundation, or the Independent Living Fund (2006), the Windrush Compensation Scheme or the National Emergencies Trust, the Victims of Overseas Terrorism Compensation Scheme which, had his income fallen to be calculated under paragraph 54 (calculation of income other than earnings: persons who are not pensioners), would have been disregarded under paragraph 28 of Schedule 8 (income in kind); and
 - (c) any payment which, had his income fallen to be calculated under paragraph 54, would have been disregarded under paragraph 41 of Schedule 8 (payments made under certain trusts and certain other payments).
 - (d) any Post Office compensation payment;
 - (e) any vaccine damage payment;
 - (f) any payment out of the estate of a person to that person's son, daughter, step-son, or step-daughter, which derives from a payment to meet the recommendation of the Infected Blood Inquiry in its interim report published on 29th July 2022 made under or by the Scottish Infected Blood Support Scheme or an approved blood scheme.

PART 8 Alternative maximum council tax reduction for the purposes of calculating eligibility for a reduction under this scheme and amount of reduction.

Alternative maximum council tax reduction under this scheme: pensioners and persons who are not pensioners.

- 31.—(1) Subject to sub-paragraphs (2) and (3), the alternative maximum council tax reduction in respect of a day where the conditions set out in paragraph 15 (alternative maximum council tax reduction: pensioners) or 18 (alternative maximum council tax reduction: persons who are not pensioners) are fulfilled, is the amount determined in accordance with Schedule 4 (amount of alternative council tax reduction).
- (2) Subject to sub-paragraph (3), where an applicant is jointly and severally liable for council tax in respect of a dwelling in which he is resident with one or more other persons, in determining the alternative maximum council tax reduction in his case, the amount determined in accordance with Schedule 4 must be divided by the number of persons who are jointly and severally liable for that tax.
- (3) Where an applicant is jointly and severally liable for council tax in respect of a dwelling with only his partner, solely by virtue of section 9 of the 1992 Act (liability of spouses and civil partners), sub-paragraph (2) does not apply in his case.

PART 9 Amount of reduction under this scheme
Amount of reduction under this scheme: Classes A to F

- 32.—(1) Where a person is entitled to a reduction under this scheme in respect of a day, the amount of the reduction to which he is entitled is as follows.
- (2) Where the person is within class A or D, that amount is the amount which is the maximum council tax reduction in respect of the day in the applicant's case.
- (3) Where the person is within class B or E, that amount is the amount found by deducting amount B from amount A, where "amount A" and "amount B" have the meanings given in paragraph 14(f) or 17(f), as the case may be.
- (4) Where the person is within class C or F, that amount is the amount which is the alternative maximum council tax reduction in respect of the day in the applicant's case.

- (5) Sub-paragraph (6) applies where both—
 - (a) sub-paragraph (2) or sub-paragraph (3), and
 - (b) sub-paragraph (4),
 apply to a person.
- (6) Subject to the maximum reduction specified by paragraph 12 and 28, the amount of the reduction to which the person is entitled is whichever is the greater of—
 - (a) the amount of the reduction given by sub-paragraph (2) or sub-paragraph (3), as the case may be, and
 - (b) the amount of the reduction given by sub-paragraph (4).

PART 10 Income and capital for the purposes of calculating eligibility for a reduction under this scheme and amount of reduction.

CHAPTER 1 Income and capital: general

Calculation of income and capital: applicant’s family and polygamous marriages

- 33.—(1) The income and capital of—
 - (a) an applicant; and
 - (b) any partner of that applicant,
 (c) is to be calculated in accordance with the provisions of this Part.
- (2) The income and capital of any partner of the applicant is to be treated as income and capital of the applicant, and in this Part any reference to the applicant applies equally to any partner of that applicant.
- (3) Except where paragraph 37 applies, where an applicant or the partner of an applicant is married polygamously to two or more members of his household—
 - (a) the applicant must be treated as possessing capital and income belonging to each such member; and
 - (b) the income and capital of that member is to be calculated in accordance with the following provisions of this Part in like manner as for the applicant.

Circumstances in which income and capital of non-dependent is to be treated as applicants.

- 34.—(1) Sub-paragraph (2) applies where it appears to the authority that a non-dependent and an applicant have entered into arrangements in order to take advantage of this scheme and the non-dependent has more income and capital than the applicant.
- (2) Except where—
 - (a) the applicant is a pensioner and is on a guarantee credit, or
 - (b) the applicant is not a pensioner and is on income support, an income-based jobseeker’s allowance or an income-related employment and support allowance,
 the authority must treat the applicant as possessing income and capital belonging to that non-dependent and, in such a case, any income and capital which the applicant does possess is to be disregarded.
- (3) Where an applicant is treated as possessing income and capital belonging to a non-dependent under sub-paragraph (2) the income and capital of that non-dependent must be calculated in accordance with the following provisions of this Part in like manner as for the applicant and, except where the context otherwise requires, any reference to the “applicant” is to be construed for the purposes of this Part as if it were a reference to that non-dependent.

CHAPTER 2 Income and capital: pensioners in receipt of guarantee credit or savings credit

Applicant in receipt of guarantee credit: pensioners

- 35. In the case of an applicant who is a pensioner and who is in receipt, or whose partner is in receipt, of a guarantee credit, the whole of his capital and income must be disregarded.

Calculation of applicant’s income and capital in savings credit only cases: pensioners.

- 36.—(1) In determining the income and capital of an applicant who is a pensioner and who has, or whose partner has, an award of state pension credit comprising only the savings credit, subject to the following provisions of this paragraph, the authority must use the calculation or estimate of the applicant's or as the case may be, the applicant's partner's income and capital made by the Secretary of State for the purpose of determining the award of state pension credit.
- (2) Where the calculation or estimate provided by the Secretary of State includes the amount taken into account in that determination in respect of net income, the authority may only adjust that amount so far as necessary to take into account—
- (a) the amount of any savings credit payable;
 - (b) in respect of any dependent children of the applicant, child care charges taken into account under paragraph 57(1)(c) (calculation of income on a weekly basis);
 - (c) the higher amount disregarded under this scheme in respect of—
 - (i) lone parent's earnings; or
 - (ii) payments of maintenance, whether under a court order or not, which is made or due to be made by—
 - (aa) the applicant's former partner, or the applicant's partner's former partner; or
 - (bb) the parent of a child or young person where that child or young person is a member of the applicant's family except where that parent is the applicant or the applicant's partner;
 - (d) any amount to be disregarded by virtue of paragraph 10(1) of Schedule 5 (sums disregarded from applicant's earnings: pensioners);
 - (e) the income and capital of any partner of the applicant who is treated as a member of the applicant's household under paragraph 8, to the extent that it is not taken into account in determining the net income of the person claiming state pension credit;
 - (f) paragraph 34 (circumstances in which capital and income of a non-dependent is to be treated as applicant's), if the authority determines that that provision applies in the applicant's case;
 - (g) such further reduction (if any) as the authority thinks fit under section 13A(1)(c) of the 1992 Act (power of billing authority to reduce amount of council tax payable);
 - (h) any amount to be disregarded by virtue of paragraph 6 of Schedule 5 (exempt work).
- (3) Paragraphs 39 to 46 (calculation of income: pensioners) and 57 to 61 (calculation of income: pensioners and persons who are not pensioners) do not apply to the amount of the net income to be taken into account under sub-paragraph (1) but do apply (so far as relevant) for the purpose of determining any adjustments to that amount which the authority makes under sub-paragraph (2).
- (4) If sub-paragraph (5) applies, the authority must calculate the applicant's capital in accordance with paragraphs 63, 65 to 68 and 70 (calculation of capital: pensioners).
- (5) This sub-paragraph applies if—
- (a) the Secretary of State notifies the authority that the applicant's capital has been determined as being £16,000 or less or the authority determines his capital as being £16,000 or less;
 - (b) subsequent to that determination the applicant's capital rises to more than £16,000; and
 - (c) the increase occurs whilst there is in force an assessed income period within the meaning of sections 6 and 9 of the State Pension Credit Act 2002.

CHAPTER 3 Income and capital where there is an award of universal credit.

Calculation of income and capital: persons who are not pensioners who have an award of universal credit.

- 37.—(1) In determining the income of an applicant—
- (a) who has, or
 - (b) who (jointly with his partner) has,
- an award of universal credit the authority must, subject to the following provisions of this paragraph, use the calculation or estimate of the amount of the income of the applicant, or the applicant and his partner jointly (as the case may be), made by the Secretary of State for the purpose of determining the award of universal credit. For the avoidance of doubt the award of Universal Credit shall be determined **before** any deduction, sanction, advance etc.
- (2) The authority must adjust the amount of the income referred to in sub-paragraph (1) by multiplying the amount by 12 and dividing the product by 52.

- (3) The authority may only adjust the amount of the income as adjusted in accordance with sub-paragraph (2) so far as necessary to take into account—
 - (a) the amount of the award of universal credit **before** any deduction, sanction, advance etc;
 - (b) paragraph 34 (circumstances in which income and capital of non-dependent is to be treated as applicant’s), if the authority determines that the provision applies in the applicant’s case;
 - (c) such further reduction (if any) as the authority thinks fit under section 13A(1)(c) of the 1992 Act (power of billing authority to reduce amount of council tax payable).
- (4) The amount for the award of universal credit to be taken into account for the purposes of sub-paragraph (3)(a) is to be determined by multiplying the amount of the award of universal credit by 12 and dividing the product by 52.
- (5) Paragraph 34 (income and capital of non-dependent to be treated as applicant’s) applies for the purpose of determining any adjustments which fall to be made to the figure for income under sub-paragraph (3).
- (6) In determining the capital of an applicant—
 - (a) who has, or
 - (b) who (jointly with his partner) has,
 an award of universal credit, the authority must use the calculation or estimate of the capital of the applicant, or the applicant and his partner jointly (as the case may be), made by the Secretary of State for the purpose of determining the award of universal credit.
- (7) In this paragraph “maximum amount” means the maximum amount calculated by the Secretary of State in accordance with section 8(2) of the Welfare Reform Act 2012.

Tolerance of cases where Universal Credit is in payment.

- (8) Where the authority receives any notification from the Secretary of State for Work and Pensions that a person who is awarded Universal Credit has a change in that award of less than £5, no adjustment shall be made to the applicant’s Council Tax Reduction.

CHAPTER 4 Income: other pensioners

Calculation of income and capital where state pension credit is not payable: pensioners.

38. Where neither paragraph 35 (applicant in receipt of guarantee credit: pensioners) nor 36 (applicant in receipt of savings credit only: pensioners) applies in the applicant’s case, his income and capital is to be calculated or estimated in accordance with paragraphs 39 to 46 and 57 to 62 (calculation of income) and Chapter 7 of this Part (calculation of capital).

Meaning of “income”: pensioners

- 39.—(1) For the purposes of classes A to C in this scheme, “income” means income of any of the following descriptions—
 - (a) earnings;
 - (b) working tax credit;
 - (c) retirement pension income within the meaning of the State Pension Credit Act 2002;
 - (d) income from annuity contracts (other than retirement pension income);
 - (e) a war disablement pension or war widow’s or widower’s pension;
 - (f) a foreign war disablement pension or war widow’s or widower’s pension;
 - (g) a guaranteed income payment;
 - (h) a payment made under article 29(1)(c) of the Armed Forces and Reserve Forces (Compensation Scheme) Order 2011, in any case where article 31(2)(c) applies;
 - (zi) Universal Credit;
 - (i) income from capital other than capital disregarded under Part 1 of Schedule 9;
 - (j) social security benefits, other than retirement pension income or any of the following benefits—
 - (i) disability living allowance;
 - (ii) personal independence payment;
 - (iii) an AFIP;
 - (iiia) the daily living component of adult disability payment;
 - (iv) attendance allowance payable under section 64 of the SSCBA (entitlement to attendance allowance);

- (v) an increase of disablement pension under section 104 (increase for constant attendance) or 105 of that Act (increase for exceptionally severe disablement);
- (vi) child benefit;
- (vii) any guardian's allowance payable under section 77 of the SSCBA (guardian's allowance);
- (viii) any increase for a dependent, other than the applicant's partner, payable in accordance with Part 4 of that Act (increases for dependants);
- (ix) any—
 - (aa) social fund payment made under Part 8 of the SSCBA (the social fund), or
 - (bb) occasional assistance;
- (x) Christmas bonus payable under Part 10 of that Act (Christmas bonus for pensioners);
- (xi) housing benefit;
- (xii) council tax benefit;
- (xiii) bereavement payment;
- (xiv) statutory sick pay;
- (xv) statutory maternity pay;
- (xvi) ordinary statutory paternity pay payable under Part 12ZA of the SSCBA;
- (xvii) statutory shared parental pay under Part 12ZC of that Act;
- (xviii) statutory parental bereavement pay under Part 12ZD of the SSCBA;
- (xix) additional statutory paternity pay payable under Part 12ZA of the SSCBA;
- (xx) statutory adoption pay payable under Part 12ZB of that Act (statutory adoption pay);
- (xxi) Removed
- (xxii) carer's allowance supplement payable under section 81 of the Social Security (Scotland) Act 2018;
- (xxiii) early years assistance given in accordance with section 32 of the Social Security (Scotland) Act 2018;
- (xxiv) funeral expense assistance given in accordance with section 34 of that Act;
- (xxv) any Scottish child payment assistance given in accordance with section 79 of that Act;
- (xxvi) any assistance given in accordance with the Carer's Assistance (Young Carer Grants) (Scotland) Regulations 2019(11);
- (xxvii) short-term assistance given in accordance with regulations under section 36 of the Social Security (Scotland) Act 2018(12);
- (xxviii) winter heating assistance given in accordance with regulations under section 30 of that Act;
- (xxix) any benefit similar to those mentioned in the preceding provisions of this paragraph payable under legislation having effect in Northern Ireland
- (k) all foreign social security benefits which are similar to the social security benefits mentioned above;
- (l) a payment made—
 - (i) under article 30 of the Naval, Military and Air Forces Etc. (Disablement and Death) Service Pensions Order 2006 (award for children who have reached the child's age limit), in any case where article 30(1)(b) applies; or
 - (ii) under article 12(8) of that Order (unemployability allowances: children who have reached the child's age limit), in any case where sub-paragraph (b) of that article applies;
- (m) a pension paid to victims of National Socialist persecution under any special provision made by the law of the Federal Republic of Germany, or any part of it, or of the Republic of Austria;
- (n) payments under a scheme made under the Pneumoconiosis etc. (Worker's Compensation) Act 1979;
- (o) payments made towards the maintenance of the applicant by his spouse, civil partner, former spouse, or former civil partner or towards the maintenance of the applicant's partner by his spouse, civil partner, former spouse, or former civil partner, including payments made—
 - (i) under a court order;
 - (ii) under an agreement for maintenance; or
 - (iii) voluntarily;
- (p) payments due from any person in respect of board and lodging accommodation provided by the applicant;
- (q) royalties or other sums paid as a consideration for the use of, or the right to use, any copyright, design, patent, or trade mark;
- (r) any payment in respect of any—
 - (i) book registered under the Public Lending Right Scheme 1982; or

- (ii) work made under any international public lending right scheme that is analogous to the Public Lending Right Scheme 1982;
 - (s) any payment, other than a payment ordered by a court or made in settlement of a claim, made by or on behalf of a former employer of a person on account of the early retirement of that person on grounds of ill-health or disability;
 - (t) any sum payable by way of pension out of money provided under—
 - (i) the Civil List Act 1837,
 - (ii) the Civil List Act 1937,
 - (iii) the Civil List Act 1952,
 - (iv) the Civil List Act 1972, or
 - (v) the Civil List Act 1975;
 - (u) any income in lieu of that specified in paragraphs (a) to (r);
 - (v) any payment of rent made to an applicant who—
 - (i) owns the freehold or leasehold interest in any property or is a tenant of any property;
 - (ii) occupies part of the property; and
 - (iii) has an agreement with another person allowing that person to occupy that property on payment of rent;
 - (w) any payment made at regular intervals under an equity release scheme;
 - (x) PPF periodic payments within the meaning of section 17(1) of the State Pension Credit Act 2002.
- (2) Where the payment of any social security benefit referred to in sub-paragraph (1) or retirement pension income to which section 16(1)(za) to (e) of the State Pension Credit Act 2002 applies is subject to any deduction (other than an adjustment specified in sub-paragraph (4)) the amount to be taken into account under sub-paragraph (1) is to be the amount before the deduction is made.
- (3) Where an award of any working tax credit or child tax credit is subject to a deduction by way of recovery of an overpayment of working tax credit or child tax credit which arose in a previous tax year the amount to be taken into account under sub-paragraph (1) is to be the amount of working tax credit or child tax credit awarded less the amount of that deduction.
- (4) The adjustments specified in this sub-paragraph are those made in accordance with—
- (a) the Social Security (Overlapping Benefits) Regulations 1979;
 - (b) the Social Security (Hospital In-Patients) Regulations 1975;
 - (c) section 30DD or section 30E of the SSCBA (reductions in incapacity benefit in respect of pensions and councillor's allowances);
 - (d) section 3 of the Welfare Reform Act 2007 (deductions from contributory employment and support allowance in respect of pensions and councillor's allowances) and regulations made under it;
 - (e) section 14 of the Pensions Act 2014 (pension sharing: reduction in sharer's section 4 pension);
 - (f) section 45B or 55B of the Social Security Contributions and Benefits Act 1992 (reduction in additional pension in Category A retirement pension and shared additional pension: pension sharing).
- (5) In sub-paragraph (1)(w), "equity release scheme" means a loan—
- (a) made between a person ("the lender") and the applicant;
 - (b) by means of which a sum of money is advanced by the lender to the applicant by way of payments at regular intervals; and
 - (c) which is secured on a dwelling in which the applicant owns an estate or interest and which he occupies as his home?

Calculation of weekly income: pensioners

- 40.—(1) Except in a case within sub-paragraph (2), (3A), (4A) or (5), for the purposes of calculating the weekly income of an applicant who is a pensioner, where the period in respect of which a payment is made—
- (a) does not exceed a week, the whole of that payment is to be included in the applicant's weekly income;
 - (b) exceeds a week, the amount to be included in the applicant's weekly income is to be determined—
 - (i) in a case where that period is a month, by multiplying the amount of the payment by 12 and dividing the product by 52;

- (ii) in a case where that period is three months, by multiplying the amount of the payment by 4 and dividing the product by 52;
- (iii) in a case where that period is a year, by dividing the amount of the payment by 52;
- (iv) in any other case, by multiplying the amount of the payment by 7 and dividing the product by the number of days in the period in respect of which it is made.

(2) Sub-paragraph (3) applies where—

- (a) the applicant's regular pattern of work is such that he does not work the same hours every week; or
- (b) the amount of the applicant's income fluctuates and has changed more than once.

(3) The weekly amount of that applicant's income is to be determined—

- (a) if, in a case to which sub-paragraph (2)(a) applies, there is a recognised cycle of work, by reference to his average weekly income over the period of the complete cycle (including, where the cycle involves periods in which the applicant does not work, those periods but disregarding any other absences); or
- (b) in any other case, on the basis of—
 - (i) the last two payments if those payments are one month or more apart;
 - (ii) the last four payments if the last two payments are less than one month apart; or
 - (iii) calculating or estimating such other payments as may, in the particular circumstances of the case, enable the applicant's average weekly income to be determined more accurately.

(3A) Income calculated pursuant to sub-paragraphs (2) and (3) must be taken into account—

- (a) in the case of an application, on the date on which the application was made or treated as made, and the first day of each reduction week thereafter;
- (b) in the case of an application or a reduction under a scheme where the applicant commences employment, the first day of the reduction week following the date the applicant commences that employment, and the first day of each reduction week thereafter; or
- (c) in the case of an application or a reduction under a scheme where the applicant's average weekly earnings from employment change, the first day of the reduction week following the date the applicant's earnings from employment change so as to require recalculation under this paragraph, and the first day of each reduction week thereafter, regardless of whether those earnings were actually received in that reduction week.

(4) For the purposes of sub-paragraph (3)(b) the last payments are the last payments before the date the application was made or treated as made.

(4A) An applicant's earnings from employment as an employed earner not calculated pursuant to sub-paragraphs (2) and (3) must be taken into account—

- (a) in the case of an application, on the date on which the application was made or treated as made, and the first day of each reduction week thereafter;
- (b) in the case of an application or a reduction under a scheme where the applicant commences employment, the first day of the reduction week following the date the applicant commences that employment, and the first day of each reduction week thereafter; or
- (c) in the case of an application or a reduction under a scheme where the applicant's average weekly earnings from employment change, the first day of the reduction week following the date of the change, and the beginning of each reduction week thereafter, regardless of whether those earnings were actually received in that reduction week.

(5) If the applicant is entitled to receive a payment to which sub-paragraph (6) applies, the amount of that payment is to be treated as if made in respect of a period of a year.

(6) This sub-paragraph applies to—

- (a) royalties or other sums paid as a consideration for the use of, or the right to use, any copyright, design, patent, or trade mark;
- (b) any payment in respect of any—
 - (i) book registered under the Public Lending Right Scheme 1982; or
 - (ii) work made under any international public lending right scheme that is analogous to the Public Lending Right Scheme 1982; and
- (c) any payment which is made on an occasional basis.

- (7) The period under which any benefit under the benefit Acts is to be taken into account is to be the period in respect of which that benefit is payable.
- (8) Where payments are made in a currency other than Sterling, the value of the payment is to be determined by taking the Sterling equivalent on the date the payment is made.
- (9) The sums specified in Schedule 5 are to be disregarded in calculating—
 - (a) the applicant’s earnings; and
 - (b) any amount to which sub-paragraph (6) applies where the applicant is the first owner of the copyright, design, patent or trademark, or an original contributor to the book or work referred to in sub-paragraph (6)(b).
- (10) For the purposes of sub-paragraph (9)(b), and for that purpose only, the amounts specified in sub-paragraph (6) is to be treated as though they were earnings.
- (11) Income specified in Schedule 6 is to be disregarded in the calculation of the applicant’s income.
- (12) Schedule 9 (capital disregards: pensioners) has effect so that—
 - (a) the capital specified in Part 1 is disregarded for the purpose of determining an applicant’s income; and
 - (b) the capital specified in Part 2 is disregarded for the purpose of determining an applicant’s income under paragraph 71 (calculation of tariff income from capital: pensioners).
- (13) In the case of any income taken into account for the purpose of calculating a person’s income any amount payable by way of tax is disregarded.

Earnings of employed earners: pensioners

- 41.—(1) Subject to sub-paragraph (2), “earnings”, in the case of employment as an employed earner who is a pensioner, means any remuneration or profit derived from that employment and includes—
- (a) any bonus or commission;
 - (b) any payment in lieu of remuneration except any periodic sum paid to an applicant on account of the termination of his employment by reason of redundancy;
 - (c) any payment in lieu of notice;
 - (d) any holiday pay;
 - (e) any payment by way of a retainer;
 - (f) any payment made by the applicant’s employer in respect of expenses not wholly, exclusively, and necessarily incurred in the performance of the duties of the employment, including any payment made by the applicant’s employer in respect of—
 - (i) travelling expenses incurred by the applicant between his home and place of employment;
 - (ii) expenses incurred by the applicant under arrangements made for the care of a member of his family owing to the applicant’s absence from home;
 - (g) the amount of any payment by way of a non-cash voucher which has been taken into account in the computation of a person’s earnings in accordance with Part 5 of Schedule 3 to the Social Security (Contributions) Regulations 2001;
 - (h) statutory sick pay and statutory maternity pay payable by the employer under the SSCBA;
 - (i) statutory paternity pay payable under Part 12ZA of that Act;
 - (j) statutory adoption pay payable under Part 12ZB of that Act;
 - (k) any sums payable under a contract of service—
 - (i) for incapacity for work due to sickness or injury; or
 - (ii) by reason of pregnancy or confinement.
- (2) Earnings does not include—
- (a) subject to sub-paragraph (3), any payment in kind;
 - (b) any payment in respect of expenses wholly, exclusively, and necessarily incurred in the performance of the duties of the employment;
 - (c) any occupational pension;
 - (d) any lump sum payment made under the Iron and Steel Re-adaptation Benefits Scheme;
 - (e) any payment of compensation made pursuant to an award by an employment tribunal established under the Employment Tribunals Act 1996 in respect of unfair dismissal or unlawful discrimination;

(f) any payment in respect of expenses arising out of the applicant's participation in a service user group.

(3) Sub-paragraph (2)(a) does not apply in respect of any non-cash voucher referred to in sub-paragraph (1)(g).

Calculation of net earnings of employed earners: pensioners

42.–(1) For the purposes of paragraph 57 (calculation of income on a weekly basis), the earnings of an applicant who is a pensioner derived or likely to be derived from employment as an employed earner to be taken into account must, subject to paragraph 40(5) and Schedule 5 (sums to be disregarded from earnings: pensioners), be his net earnings.

(2) For the purposes of sub-paragraph (1) net earnings must, except where sub-paragraph (5) applies, be calculated by taking into account the gross earnings of the applicant from that employment over the assessment period, less—

(a) any amount deducted from those earnings by way of—

(i) income tax;

(ii) primary Class 1 contributions under the SSCBA;

(b) one-half of any sum paid by the applicant by way of a contribution towards an occupational pension scheme;

(c) one-half of the amount calculated in accordance with sub-paragraph (4) in respect of any qualifying contribution payable by the applicant; and

(d) where those earnings include a payment which is payable under any enactment having effect in Northern Ireland and which corresponds to statutory sick pay, statutory maternity pay, ordinary or additional statutory paternity pay or statutory adoption pay, any amount deducted from those earnings by way of any contributions which are payable under any enactment having effect in Northern Ireland and which correspond to primary Class 1 contributions under the SSCBA.

(3) In this paragraph “qualifying contribution” means any sum which is payable periodically as a contribution towards a personal pension scheme.

(4) The amount in respect of any qualifying contribution is to be calculated by multiplying the daily amount of the qualifying contribution by the number equal to the number of days in the assessment period; and for the purposes of this paragraph the daily amount of the qualifying contribution is to be determined—

(a) where the qualifying contribution is payable monthly, by multiplying the amount of the qualifying contribution by 12 and dividing the product by 365;

(b) in any other case, by dividing the amount of the qualifying contribution by the number equal to the number of days in the period to which the qualifying contribution relates.

(5) Where the earnings of an applicant are determined under paragraph 40(2)(b) (calculation of weekly income: pensioners) his net earnings is to be calculated by taking into account those earnings over the assessment period, less—

(a) an amount in respect of income tax equivalent to an amount calculated by applying to those earnings the basic rate of tax applicable to the assessment period less only the personal relief to which the applicant is entitled under sections 35 to 37 the Income Tax Act 2007 (personal allowances) as is appropriate to his circumstances but, if the assessment period is less than a year, the earnings to which the basic rate of tax is to be applied and the amount of the personal relief deductible under this sub-paragraph is to be calculated on a pro rata basis;

(b) an amount equivalent to the amount of the primary Class 1 contributions that would be payable by him under the SSCBA in respect of those earnings if such contributions were payable; and

(c) one-half of any sum which would be payable by the applicant by way of a contribution towards an occupational or personal pension scheme if the earnings so estimated were actual earnings.

Calculation of earnings of self-employed earners: pensioners

43.–(1) Where the earnings of an applicant who is a pensioner consist of earnings from employment as a self-employed earner, the weekly amount of his earnings is to be determined by reference to his average weekly earnings from that employment—

- (a) over a period of one year; or
 - (b) where the applicant has recently become engaged in that employment or there has been a change which is likely to affect the normal pattern of business, over such other period (“computation period”) as may, in the particular case, enable the weekly amount of his earnings to be determined more accurately.
- (2) For the purposes of determining the weekly amount of earnings of an applicant to whom sub-paragraph (1)(b) applies, his earnings over the computation period are to be divided by the number equal to the number of days in that period and the product multiplied by 7.
- (3) The period over which the weekly amount of an applicant’s earnings is calculated in accordance with this paragraph is to be his assessment period.

Earnings of self-employed earners: pensioners

- 44.–(1) Subject to sub-paragraph (2), “earnings”, in the case of employment as a self-employed earner who is a pensioner, means the gross income of the employment.
- (2) “Earnings” in the case of employment as a self-employed earner does not include–
- (a) where an applicant occupies a dwelling as his home and he provides in that dwelling board and lodging accommodation for which payment is made, those payments;
 - (b) any payment made by a local authority to an applicant–
 - (i) with whom a person is accommodated by virtue of arrangements made under section 22C or 23(2)(a) of the Children Act 1989 or, as the case may be, section 26(1) of the Children (Scotland) Act 1995; or
 - (ii) with whom a local authority fosters a child under the Looked After Children (Scotland) Regulations 2009 or who is a kinship carer under those Regulations;
 - (c) any payment made by a voluntary organisation in accordance with section 59(1)(a) of the Children Act 1989 (provision of accommodation by voluntary organisations);
 - (d) any payment made to the applicant or his partner for a person (“the person concerned”) who is not normally a member of the applicant’s household but is temporarily in his care, by–
 - (i) a local authority but excluding payments of housing benefit made in respect of the person concerned;
 - (ii) a voluntary organisation;
 - (iii) the person concerned pursuant to section 26(3A) of the National Assistance Act 1948;
 - (iv) the National Health Service Commissioning Board or a clinical commissioning group established under section 14D of the National Health Service Act 2006; or
 - (v) a Local Health Board established under section 11 of the National Health Service (Wales) Act 2006;
 - (vi) the persons concerned where the payment is for the provision of accommodation to meet that person’s needs for care and support under section 35 or 36 of the Social Services and Well-being (Wales) Act 2014 (respectively, duty and power to meet care and support needs of an adult);
 - (da) any payment or part of a payment made by a local authority in accordance with section 26A of the Children (Scotland) Act 1995 (duty to provide continuing care) to a person (“A”) which A passes on to the applicant where A–
 - (i) was formerly in the applicant’s care;
 - (ii) is aged 16 or over; and
 - (iii) continues to live with the applicant;
 - (db) any payments made to an applicant under section 73(1)(b) of the Children and Young People (Scotland) Act 2014 (kinship care assistance: further provisions
 - (e) any sports award.

Notional income: pensioners

- 45.–(1) An applicant who is a pensioner is to be treated as possessing–
- (a) subject to sub-paragraph (2), the amount of any retirement pension income–
 - (i) for which no claim has been made; and
 - (ii) to which he might expect to be entitled if a claim for it were made;
 - (b) income from an occupational pension scheme which the applicant elected to defer.
- (2) Sub-paragraph (1)(a) does not apply to the following where entitlement has been deferred–
- (a) a Category A or Category B retirement pension payable under sections 43 to 55 of the SSCBA;
 - (b) a shared additional pension payable under section 55A of the SSCBA;

- (c) graduated retirement benefit payable under sections 36 and 37 of the National Insurance Act 1965.
- (3) For the purposes of sub-paragraph (2), entitlement has been deferred—
- (a) in the case of a Category A or Category B pension, in the circumstances specified in section 55(3) of the SSCBA;
 - (b) in the case of a shared additional pension, in the circumstances specified in section 55C(3) of the SSCBA; and
 - (c) in the case of graduated retirement benefit, in the circumstances specified in section 36(4) and (4A) of the National Insurance Act 1965.
- (4) This sub-paragraph applies where a person who has attained the qualifying age for state pension credit—
- (a) is entitled to money purchase benefits under an occupational pension scheme or a personal pension scheme;
 - (b) fails to purchase an annuity with the funds available in that scheme; and
 - (c) either—
 - (i) defers in whole or in part the payment of any income which would have been payable to him by his pension fund holder, or
 - (ii) fails to take any necessary action to secure that the whole of any income which would be payable to him by his pension fund holder upon his applying for it, is so paid, or
 - (iii) income withdrawal is not available to him under that scheme.
- (5) Where sub-paragraph (4) applies, the amount of any income foregone is to be treated as possessed by that person, but only from the date on which it could be expected to be acquired were an application for it to be made.
- (6) The amount of any income foregone in a case where sub-paragraph (4)(c)(i) or (ii) applies is to be the maximum amount of income which may be withdrawn from the fund and must be determined by the authority, taking account of information provided by the pension fund holder.
- (7) The amount of any income foregone in a case where sub-paragraph (4)(c)(iii) applies is to be the income that the applicant could have received without purchasing an annuity had the funds held under the relevant scheme been held under a personal pension scheme or occupational pension scheme where income withdrawal was available and is to be determined in the manner specified in sub-paragraph (6).
- (8) In sub-paragraph (4), “money purchase benefits” has the same meaning as in the Pension Schemes Act 1993.
- (9) Subject to sub-paragraphs (10) and (12), a person is to be treated as possessing income of which he has deprived himself for the purpose of securing entitlement to a reduction under this scheme or increasing the amount of the reduction.
- (10) Sub-paragraph (9) does not apply in respect of the amount of an increase of pension or benefit where a person, having made an election in favour of that increase of pension or benefit under Schedule 5 or 5A to the SSCBA or under Schedule 1 to the Social Security (Graduated Retirement Benefit) Regulations 2005, changes that election in accordance with regulations made under Schedule 5 or 5A to that Act in favour of a lump sum.
- (11) In sub-paragraph (10), “lump sum” means a lump sum under Schedule 5 or 5A to the SSCBA or under Schedule 1 to the Social Security (Graduated Retirement Benefit) Regulations 2005.
- (12) Sub-paragraph (9) does not apply in respect of any amount of income other than earnings, or earnings of an employed earner, arising out of the applicant’s participation in a service user group.
- (13) Where an applicant is in receipt of any benefit under the benefit Acts and the rate of that benefit is altered with effect from a date on or after 1st April in any year but not more than 14 days thereafter, the authority must treat the applicant as possessing such benefit at the altered rate from either 1st April or the first Monday in April in that year, whichever date the authority selects to apply, to the date on which the altered rate is to take effect.

- (14) In the case of an applicant who has, or whose partner has, an award of state pension credit comprising only the savings credit, where the authority treats the applicant as possessing any benefit at the altered rate in accordance with sub-paragraph (13), the authority must—
- (a) determine the income and capital of that applicant in accordance with paragraph 36(1) (calculation of applicant’s income in savings credit only cases: pensioners) where the calculation or estimate of that income and capital is altered with effect from a date on or after 1st April in any year but not more than 14 days thereafter; and
 - (b) treat that applicant as possessing such income and capital at the altered rate by reference to the date selected by the relevant authority to apply in its area, for the purposes of establishing the period referred to in sub-paragraph (13).
- (15) For the purposes of sub-paragraph (9), a person is not to be regarded as depriving himself of income where—
- (a) his rights to benefits under a registered pension scheme are extinguished and in consequence of this he receives a payment from the scheme, and
 - (b) that payment is a trivial commutation lump sum within the meaning given by paragraph 7 of Schedule 29 to the Finance Act 2004.
- (16) In sub-paragraph (15), “registered pension scheme” has the meaning given in section 150(2) of the Finance Act 2004.

Income paid to third parties: pensioners.

- 46.—(1) Any payment of income, other than a payment specified in sub-paragraph (2) or (3), to a third party in respect of an applicant who is a pensioner is to be treated as possessed by the applicant.
- (2) Sub-paragraph (1) does not apply in respect of a payment of income made under an occupational pension scheme, in respect of a pension or other periodical payment made under a personal pension scheme or a payment made by the Board of the Pension Protection Fund where—
- (a) a bankruptcy order has been made in respect of the person in respect of whom the payment has been made or, in Scotland, the estate of that person is subject to sequestration or a judicial factor has been appointed on that person’s estate under section 41 of the Solicitors (Scotland) Act 1980;
 - (b) the payment is made to the trustee in bankruptcy or any other person acting on behalf of the creditors; and
 - (c) the person referred to in paragraph (a) and his partner does not possess, or is not treated as possessing, any other income apart from that payment.
- (3) Sub-paragraph (1) does not apply in respect of any payment of income other than earnings, or earnings derived from employment as an employed earner, arising out of the applicant’s participation in a service user group.

CHAPTER 5 Income: persons who are not pensioners.

Average weekly earnings of employed earners: persons who are not pensioners.

- 47.—(1) Where the income of an applicant who is not a pensioner consists of earnings from employment as an employed earner his average weekly earnings must be estimated by reference to his earnings from that employment—
- (a) over a period immediately preceding the reduction week in which the application is made or treated as made and being a period of—
 - (i) 5 weeks, if he is paid weekly; or
 - (ii) 2 months, if he is paid monthly; or
 - (b) whether or not paragraph (a)(i) or (ii) applies, where an applicant’s earnings fluctuate, over such other period preceding the reduction week in which the application is made or treated as made as may, in any particular case, enable his average weekly earnings to be estimated more accurately.
- (2) Where the applicant has been in his employment for less than the period specified in sub-paragraph (1)(a)(i) or (ii)—

- (a) if he has received any earnings for the period that he has been in that employment and those earnings are likely to represent his average weekly earnings from that employment his average weekly earnings must be estimated by reference to those earnings;
 - (b) in any other case, the authority must estimate the applicant's average weekly earnings.
- (3) Where the amount of an applicant's earnings changes the authority must estimate his average weekly earnings by reference to his likely earnings from the employment over such period as is appropriate in order that his average weekly earnings may be estimated accurately but the length of the period must not in any case exceed 52 weeks.
- (3A) Income calculated pursuant to sub-paragraphs (2) and (3) must be taken into account---
- (a) in the case of an application, on the date on which the application was made or treated as made, and the first day of each reduction week thereafter;
 - (b) in the case of an application or a reduction under a scheme where the applicant commences employment, the first day of each reduction week following the date the applicant commences that employment and the first day of each reduction week thereafter; or
 - (c) in the case of an application or a reduction under a scheme where the applicant's average weekly earnings from employment change, the first day of the reduction week following the date the applicant's earnings from employment change so as to require calculation under this paragraph, and the first day of each reduction week thereafter, regardless of whether those earnings were actually received in that reduction week thereafter,
- (4) For the purposes of this paragraph the applicant's earnings are to be calculated in accordance with paragraphs 51 and 52 (earnings of employed earners: persons who are not pensioners).
- (4A) An applicant's earnings from employment as an employed earner not calculated pursuant to sub-paragraphs (2) and (3) must be taken into account---
- (a) in the case of an application, on the date on which the application was made or treated as made, and the first day of each reduction week thereafter;
 - (b) in the case of an application or a reduction under a scheme where the applicant commences employment, the first day of the reduction week following the date the applicant commences that employment and the first day of each reduction week thereafter; or
 - (c) in the case of an application or a reduction under a scheme where the applicant's average weekly earnings from employment change, the first day of the reduction week following the date of the change, and the beginning of each reduction week thereafter, regardless of whether those earnings were actually received in that reduction week.

Average weekly earnings of self-employed earners: persons who are not pensioners.

- 48.-(1) Where the income of an applicant who is not a pensioner consists of earnings from employment as a self-employed earner his average weekly earnings must be estimated by reference to his earnings from that employment over such period as is appropriate in order that his average weekly earnings may be estimated accurately but the length of the period must not in any case exceed a year.
- (2) For the purposes of this paragraph the applicant's earnings must be calculated in accordance with paragraphs 53, 61 and 62 (earnings, and net profit, of self-employed earners).

Average weekly income other than earnings: persons who are not pensioners.

- 49.-(1) The income of an applicant who is not a pensioner which does not consist of earnings must, except where sub-paragraph (2) applies, be estimated over such period as is appropriate in order that his average weekly income may be estimated accurately but the length of the period must not in any case exceed 52 weeks; and nothing in this paragraph authorises an authority to disregard any such income other than that specified in Schedule 8 (sums disregarded in the calculation of income other than earnings: persons who are not pensioners).
- (2) The period over which any benefit under the benefit Acts is to be taken into account is to be the period in respect of which that benefit is payable.
- (3) For the purposes of this paragraph income other than earnings is to be calculated in accordance with paragraph 54 (calculation of income other than earnings: persons who are not pensioners).

Calculation of weekly income of employed earners: persons who are not pensioners.

- 50.—(1) For the purposes of paragraphs 47 (average weekly earnings of employed earners), 49 (average weekly income other than earnings) and 59 (calculation of average weekly income from tax credits), where the period in respect of which a payment is made—
- (a) does not exceed a week, the weekly amount is to be the amount of that payment;
 - (b) exceeds a week, the weekly amount is to be determined—
 - (i) in a case where that period is a month, by multiplying the amount of the payment by 12 and dividing the product by 52;
 - (ii) in any other case, by dividing the amount of the payment by the number equal to the number of days in the period to which it relates and multiplying the product by 7.
- (2) For the purposes of paragraph 48 (average weekly earnings of self-employed earners) the weekly amount of earnings of an applicant is to be determined by dividing his earnings over the assessment period by the number equal to the number of days in that period and multiplying the product by 7.

Earnings of employed earners: persons who are not pensioners.

- 51.—(1) Subject to sub-paragraph (2), “earnings”, in the case of employment as an employed earner of a person who is not a pensioner, means any remuneration or profit derived from that employment and includes—
- (a) any bonus or commission;
 - (b) any payment in lieu of remuneration except any periodic sum paid to an applicant on account of the termination of his employment by reason of redundancy;
 - (c) any payment in lieu of notice or any lump sum payment intended as compensation for the loss of employment but only in so far as it represents loss of income;
 - (d) any holiday pay except any payable more than 4 weeks after termination or interruption of the employment;
 - (e) any payment by way of a retainer;
 - (f) any payment made by the applicant’s employer in respect of expenses not wholly, exclusively, and necessarily incurred in the performance of the duties of the employment, including any payment made by the applicant’s employer in respect of—
 - (i) travelling expenses incurred by the applicant between his home and place of employment;
 - (ii) expenses incurred by the applicant under arrangements made for the care of a member of his family owing to the applicant’s absence from home;
 - (g) any award of compensation made under section 112(4) or 117(3)(a) of the Employment Rights Act 1996 (remedies and compensation for unfair dismissal);
 - (h) any payment or remuneration made under section 28, 34, 64, 68 or 70 of the Employment Rights Act 1996 (right to guarantee payments, remuneration on suspension on medical or maternity grounds, complaints to employment tribunals);
 - (i) any such sum as is referred to in section 112 of the SSCBA (certain sums to be earnings for social security purposes);
 - (j) any statutory sick pay, statutory maternity pay, statutory paternity pay or statutory adoption pay, or a corresponding payment under any enactment having effect in Northern Ireland;
 - (k) any remuneration paid by or on behalf of an employer to the applicant who for the time being is on maternity leave, paternity leave or adoption leave or is absent from work because he is ill;
 - (l) the amount of any payment by way of a non-cash voucher which has been taken into account in the computation of a person’s earnings in accordance with Part 5 of Schedule 3 to the Social Security (Contributions) Regulations 2001.
- (2) Earnings does not include—
- (a) subject to sub-paragraph (3), any payment in kind;
 - (b) any payment in respect of expenses wholly, exclusively, and necessarily incurred in the performance of the duties of the employment;
 - (c) any occupational pension;
 - (d) any payment in respect of expenses arising out of the applicant’s participation in a service user group.
- (3) Sub-paragraph (2)(a) does not apply in respect of any non-cash voucher referred to in sub-paragraph (1)(l).

Calculation of net earnings of employed earners: persons who are not pensioners.

- 52.–(1) For the purposes of paragraph 47 (average weekly earnings of employed earners: persons who are not pensioners), the earnings of an applicant who is not a pensioner derived or likely to be derived from employment as an employed earner to be taken into account must, subject to sub-paragraph (2), be his net earnings.
- (2) There is to be disregarded from an applicant’s net earnings, any sum, where applicable, specified in paragraphs 1 to 16 of Schedule 7 (sums disregarded in the calculation of earnings: persons who are not pensioners).
- (3) For the purposes of sub-paragraph (1) net earnings must, except where sub-paragraph (6) applies, be calculated by taking into account the gross earnings of the applicant from that employment over the assessment period, less–
- (a) any amount deducted from those earnings by way of–
 - (i) income tax;
 - (ii) primary Class 1 contributions under the SSCBA;
 - (b) one-half of any sum paid by the applicant by way of a contribution towards an occupational pension scheme;
 - (c) one-half of the amount calculated in accordance with sub-paragraph (5) in respect of any qualifying contribution payable by the applicant; and
 - (d) where those earnings include a payment which is payable under any enactment having effect in Northern Ireland and which corresponds to statutory sick pay, statutory maternity pay, statutory paternity pay or statutory adoption pay, any amount deducted from those earnings by way of any contributions which are payable under any enactment having effect in Northern Ireland and which correspond to primary Class 1 contributions under the SSCBA.
- (4) In this paragraph “qualifying contribution” means any sum which is payable periodically as a contribution towards a personal pension scheme.
- (5) The amount in respect of any qualifying contribution is to be calculated by multiplying the daily amount of the qualifying contribution by the number equal to the number of days in the assessment period; and for the purposes of this paragraph the daily amount of the qualifying contribution is to be determined–
- (a) where the qualifying contribution is payable monthly, by multiplying the amount of the qualifying contribution by 12 and dividing the product by 365;
 - (b) in any other case, by dividing the amount of the qualifying contribution by the number equal to the number of days in the period to which the qualifying contribution relates.
- (6) Where the earnings of an applicant are estimated under paragraph 47(2)(b) (average weekly earnings of employed earners: classes D to H), his net earnings is to be calculated by taking into account those earnings over the assessment period, less–
- (a) an amount in respect of income tax equivalent to an amount calculated by applying to those earnings the basic rate or in the case of a Scottish taxpayer, the Scottish basic rate of tax applicable to the assessment period less only the personal relief to which the applicant is entitled under section 35, 36 or 37 of the Income Tax Act 2007 as is personal reliefs to which the applicant is entitled under Chapters 2, 3 and 3A of Part 3 of the Income Tax Act 2007 as are; (personal allowances) as is appropriate to his circumstances but, if the assessment period is less than a year, the earnings to which the basic rate or in the case of a Scottish taxpayer, the Scottish basic rate of tax is to be applied and the amount of the personal relief deductible under this sub-paragraph is to be calculated on a pro rata basis;
 - (b) an amount equivalent to the amount of the primary Class 1 contributions that would be payable by him under the SSCBA in respect of those earnings if such contributions were payable; and
 - (c) one-half of any sum which would be payable by the applicant by way of a contribution towards an occupational or personal pension scheme, if the earnings so estimated were actual earnings

Earnings of self-employed earners: persons who are not pensioners.

- 53.–(1) Subject to sub-paragraph (2), “earnings”, in the case of employment as a self-employed earner of a person who is not a pensioner, means the gross income of the employment.

- (2) “Earnings” does not include any payment to which paragraph 31 or 32 of Schedule 8 refers (payments in respect of a person accommodated with the applicant under arrangements made by a local authority or voluntary organisation and payments made to the applicant by a health authority, local authority, or voluntary organisation in respect of persons temporarily in the applicant’s care) nor does it include any sports award.
- (3) This paragraph applies to—
- (a) royalties or other sums paid as a consideration for the use of, or the right to use, any copyright, design, patent, or trade mark; or
 - (b) any payment in respect of any—
 - (i) book registered under the Public Lending Right Scheme 1982; or
 - (ii) work made under any international public lending right scheme that is analogous to the Public Lending Right Scheme 1982, where the applicant is the first owner of the copyright, design, patent or trade mark, or an original contributor to the book or work concerned.
- (4) Where the applicant’s earnings consist of any items to which sub-paragraph (3) applies, those earnings must be taken into account over a period equal to such number of weeks as is equal to the number obtained (and any fraction is to be treated as a corresponding fraction of a week) by dividing the earnings by—
- (a) the amount of reduction under this scheme to which the applicant would have been entitled had the payment not been made, plus;
 - (b) an amount equal to the total of the sums which would fall to be disregarded from the payment under Schedule 7 (sums disregarded in the calculation of earnings: persons who are not pensioners) as appropriate in the applicant’s case.

Calculation of income other than earnings: persons who are not pensioners.

- 54.—(1) For the purposes of paragraph 49 (average weekly income other than earnings: persons who are not pensioners), the income of an applicant who is not a pensioner which does not consist of earnings to be taken into account must, subject to sub-paragraphs (2) to (8), be his gross income and any capital treated as income under paragraph 55 (capital treated as income: persons who are not pensioners).
- (2) There is to be disregarded from the calculation of an applicant’s gross income under sub-paragraph (1), any sum, where applicable, specified in Schedule 8.
- (3) Where the payment of any benefit under the benefit Acts is subject to any deduction by way of recovery the amount to be taken into account under sub-paragraph (1) must be the gross amount payable.
- (4) Where the applicant or, where he is a member of a couple, his partner is receiving a contributory employment and support allowance and that benefit has been reduced under regulation 63 of the Employment and Support Allowance Regulations 2008, the amount of that benefit to be taken into account is the amount as if it had not been reduced.
- (5) Where an award of any working tax credit or child tax credit under the Tax Credits Act 2002 is subject to a deduction by way of recovery of an overpayment of working tax credit or child tax credit which arose in a previous tax year the amount to be taken into account under sub-paragraph (1) is to be the amount of working tax credit or child tax credit awarded less the amount of that deduction.
- (6) Sub-paragraphs (7) and (8) apply where—
- (a) a relevant payment has been made to a person in an academic year; and
 - (b) that person abandons, or is dismissed from, his course of study before the payment to him of the final instalment of the relevant payment.
- (7) Where a relevant payment is made quarterly, the amount of a relevant payment to be taken into account for the assessment period for the purposes of sub-paragraph (1) in respect of a person to whom sub-paragraph (7) applies, is to be calculated by applying the formula—

$$(A - (B \times C)) / D$$

Where;

- A = the total amount of the relevant payment which that person would have received had he remained a student until the last day of the academic term in which he abandoned, or was dismissed from, his course, less any deduction under paragraph 81(5) (costs of travel, books, and equipment);
- B = the number of reduction weeks from the reduction week immediately following that which includes the first day of that academic year to the reduction week which includes the day on which the person abandoned, or was dismissed from, his course;
- C = the weekly amount of the relevant payment, before the application of the £10 disregard, which would have been taken into account as income under paragraph 81(2) (treatment of student loans) had the person not abandoned or been dismissed from, his course and, in the case of a person who was not entitled to a reduction under this scheme immediately before he abandoned or was dismissed from his course, had that person, at that time, been entitled to housing benefit;
- D = the number of reduction weeks in the assessment period.

(8) Where a relevant payment is made by two or more instalments in a quarter, the amount of a relevant payment to be taken into account for the assessment period for the purposes of sub-paragraph (1) in respect of a person to whom sub-paragraph (7) applies, is to be calculated by applying the formula in sub-paragraph (8) but as if—

A = the total amount of relevant payments which that person received, or would have received, from the first day of the academic year to the day the person abandoned the course, or was dismissed from it, less any deduction under paragraph 81(5).

(9) In this paragraph—

“academic year” and “student loan” have the same meanings as in Part 11 (students);

“assessment period” means—

- (a) in a case where a relevant payment is made quarterly, the period beginning with the reduction week which includes the day on which the person abandoned, or was dismissed from, his course and ending with the reduction week which includes the last day of the last quarter for which an instalment of the relevant payment was payable to that person;
- (b) in a case where the relevant payment is made by two or more instalments in a quarter, the period beginning with the reduction week which includes the day on which the person abandoned, or was dismissed from, his course and ending with the reduction week which includes—
- (i) the day immediately before the day on which the next instalment of the relevant payment would have been due had the payments continued; or
- (ii) the last day of the last quarter for which an instalment of the relevant payment was payable to that person,
- whichever of those dates is earlier;

“quarter” in relation to an assessment period means a period in that year beginning on—

- 1st January and ending on 31st March;
- 1st April and ending on 30th June;
- 1st July and ending on 31st August; or
- 1st September and ending on 31st December;

“relevant payment” means either a student loan or an amount intended for the maintenance of dependants referred to in paragraph 76(7) or both.

(10) For the avoidance of doubt there must be included as income to be taken into account under sub-paragraph (1)—

- (a) any payment to which paragraph 41(2) or 51(2) (payments not earnings) applies; or
- (b) in the case of an applicant who is receiving support under section 95 or 98 of the Immigration and Asylum Act 1999 including support provided by virtue of regulations made under Schedule 9 to that Act, the amount of such support provided in respect of essential living needs of the applicant and his dependants (if any) as is specified in regulations made under paragraph 3 of Schedule 8 to the Immigration and Asylum Act 1999.

Capital treated as income: persons who are not pensioners.

55.—(1) Any capital payable by instalments which are outstanding at the date on which the application is made or treated as made, or, at the date of any subsequent revision or supersession, must, if the aggregate of the instalments outstanding and the amount of the applicant’s capital otherwise calculated in accordance with Chapter 7 of this Part exceeds £16,000, be treated as income.

- (2) Any payment received under an annuity is to be treated as income.
- (3) Any earnings to the extent that they are not a payment of income is to be treated as income.
- (4) Any Career Development Loan paid pursuant to section 2 of the Employment and Training Act 1973 is to be treated as income.
- (5) Where an agreement or court order provides that payments must be made to the applicant in consequence of any personal injury to the applicant and that such payments are to be made, wholly or partly, by way of periodic payments, any such periodic payments received by the applicant (but not a payment which is treated as capital by virtue of this Part), is to be treated as income.

Notional income: persons who are not pensioners.

- 56.—(1) An applicant who is not a pensioner is to be treated as possessing income of which he has deprived himself for the purpose of securing entitlement to a reduction under a council tax reduction scheme or increasing the amount of the reduction.
- (2) Except in the case of—
 - (a) a discretionary trust;
 - (b) a trust derived from a payment made in consequence of a personal injury;
 - (c) a personal pension scheme, occupational pension scheme or a payment made by the Board of the Pension Protection Fund where the applicant has not attained the qualifying age for state pension credit;
 - (d) any sum to which paragraph 50(2)(a) of Schedule 10 (capital disregards: persons who are not pensioners) applies which is administered in the way referred to in paragraph 50(1)(a);
 - (e) any sum to which paragraph 51(a) of Schedule 10 refers;
 - (f) rehabilitation allowance made under section 2 of the Employment and Training Act 1973;
 - (g) child tax credit;
 - (h) working tax credit, or
 - (i) any sum to which sub-paragraph (11) applies,
 - (j) any income which would become available to the applicant upon application being made, but which has not been acquired by him, is to be treated as possessed by the applicant but only from the date on which it could be expected to be acquired were an application made.
 - (3) Any payment of income, other than a payment of income specified in sub-paragraph (4), made—
 - (a) to a third party in respect of a single applicant or a member of the family (but not a member of the third party's family) must, where that payment is a payment of an occupational pension, a pension or other periodical payment made under a personal pension scheme or a payment made by the Board of the Pension Protection Fund, be treated as possessed by that single applicant or, as the case may be, by that member;
 - (b) to a third party in respect of a single applicant or in respect of a member of the family (but not a member of the third party's family) must, where it is not a payment referred to in paragraph (a), be treated as possessed by that single applicant or by that member to the extent that it is used for the food, ordinary clothing or footwear, household fuel or rent of that single applicant or, as the case may be, of any member of that family or is used for any council tax or water charges for which that applicant or member is liable;
 - (c) to a single applicant or a member of the family in respect of a third party (but not in respect of another member of that family) must be treated as possessed by that single applicant or, as the case may be, that member of the family to the extent that it is kept or used by him or used by or on behalf of any member of the family.
 - (4) Sub-paragraph (3) does not apply in respect of a payment of income made—
 - (a) under or by the Macfarlane Trust, the Macfarlane (Special Payments) Trust, the Macfarlane (Special Payments) (No. 2) Trust, the Fund, the Eileen Trust, MFET Limited, the Skipton Fund, the Caxton Foundation, or the Independent Living Fund (2006);
 - (b) pursuant to section 19(1)(a) of the Coal Industry Act 1994 (concessionary coal);
 - (c) pursuant to section 2 of the Employment and Training Act 1973 in respect of a person's participation—
 - (i) in an employment programme specified in regulation 75(1)(a)(ii) of the Jobseeker's Allowance Regulations 1996(144);
 - (ii) in a training scheme specified in regulation 75(1)(b)(ii) of those Regulations;
 - (iii) in the Intense Activity Period specified in regulation 75(1)(a)(iv) of those Regulations;

- (iv) in a qualifying course within the meaning specified in regulation 17A(7) of those Regulations; or
 - (v) in the Flexible New Deal specified in regulation 75(1)(a)(v) of those Regulations;
 - (d) in respect of a person's participation in the Work for Your Benefit Pilot Scheme;
 - (e) in respect of a person's participation in the Mandatory Work Activity Scheme;
 - (f) in respect of an applicant's participation in the Employment, Skills, and Enterprise Scheme;
 - (g) under an occupational pension scheme, in respect of a pension or other periodical payment made under a personal pension scheme or a payment made by the Board of the Pension Protection Fund where—
 - (i) a bankruptcy order has been made in respect of the person in respect of whom the payment has been made or, in Scotland, the estate of that person is subject to sequestration or a judicial factor has been appointed on that person's estate under section 41 of the Solicitors (Scotland) Act 1980;
 - (ii) the payment is made to the trustee in bankruptcy or any other person acting on behalf of the creditors; and
 - (iii) the person referred to in sub-paragraph (i) and any member of his family does not possess, or is not treated as possessing, any other income apart from that payment.
- (5) Where an applicant is in receipt of any benefit under the benefit Acts and the rate of that benefit is altered with effect from a date on or after 1st April in any year but not more than 14 days thereafter, the authority must treat the applicant as possessing such benefit at the altered rate from either 1st April or the first Monday in April in that year, whichever date the authority selects, to the date on which the altered rate is to take effect.
- (6) Subject to sub-paragraph (7), where—
- (a) an applicant performs a service for another person; and
 - (b) that person makes no payment of earnings or pays less than that paid for a comparable employment in the area,
- the authority must treat the applicant as possessing such earnings (if any) as is reasonable for that employment unless the applicant satisfies the authority that the means of that person are insufficient for him to pay or to pay more for the service.
- (7) Sub-paragraph (6) does not apply—
- (a) to an applicant who is engaged by a charitable or voluntary organisation or who is a volunteer if the authority is satisfied in any of those cases that it is reasonable for him to provide those services free of charge; or
 - (b) in a case where the service is performed in connection with—
 - (i) the applicant's participation in an employment or training programme in accordance with regulation 19(1)(q) of the Jobseeker's Allowance Regulations 1996, other than where the service is performed in connection with the applicant's participation in the Intense Activity Period specified in regulation 75(1)(a)(iv) of those Regulations; or
 - (ii) the applicant's or the applicant's partner's participation in an employment or training programme as defined in regulation 19(3) of those Regulations for which a training allowance is not payable or, where such an allowance is payable, it is payable for the sole purpose of reimbursement of travelling or meal expenses to the person participating in that programme; or
 - (c) to an applicant who is participating in a work placement approved by the Secretary of State (or a person providing services to the Secretary of State) before the placement starts.
- (8) In sub-paragraph (7)(c) "work placement" means practical work experience which is not undertaken in expectation of payment.
- (9) Where an applicant is treated as possessing any income under any of sub-paragraphs (1) to (8), the foregoing provisions of this Part apply for the purposes of calculating the amount of that income as if a payment had actually been made and as if it were actual income which he does possess.
- (10) Where an applicant is treated as possessing any earnings under sub-paragraph (6) the foregoing provisions of this Part apply for the purposes of calculating the amount of those earnings as if a payment had actually been made and as if they were actual earnings which he does possess except that paragraph 42(2) or 52(3) (calculation of net earnings of employed earners: pensioners and persons who are not pensioners, respectively) do not apply and his net earnings are to be calculated by taking into account those earnings which he is treated as possessing, less—

- (a) an amount in respect of income tax equivalent to an amount calculated by applying to those earnings the basic rate of tax applicable to the assessment period less only the personal relief to which the applicant is entitled under sections 35 to 37 of the Income Tax Act 2007 (personal allowances) as is appropriate to his circumstances; but, if the assessment period is less than a year, the earnings to which the basic rate of tax is to be applied and the amount of the personal relief deductible under this sub-paragraph is to be calculated on a pro rata basis;
- (b) an amount equivalent to the amount of the primary Class 1 contributions that would be payable by him under the SSCBA in respect of those earnings if such contributions were payable; and
- (c) one-half of any sum payable by the applicant by way of a contribution towards an occupational or personal pension scheme.

(11) Sub-paragraphs (1), (2), (3) and (6) do not apply in respect of any amount of income other than earnings, or earnings of an employed earner, arising out of the applicant participating as a service user.

CHAPTER 6 Income: further provisions applying to pensioners and persons who are not pensioners.

Calculation of income on a weekly basis

57.-(1) Subject to paragraph 60 (disregard of changes in tax, etc.), the income of an applicant is to be calculated on a weekly basis—

- (a) by estimating the amount which is likely to be his average weekly income in accordance with this Part;
- (b) by adding to that amount, the weekly income calculated—
- (c) if the applicant is a pensioner, under paragraph 71 (tariff income: pensioners);
 - a. (ii) if the applicant is a person who is not a pensioner, under paragraph 72 (tariff income: persons who are not pensioners); and
- (d) deducting from the sum of paragraphs (a) and (b) any relevant child care charges to which paragraph 58 (treatment of child care charges) applies from any earnings which form part of the average weekly income or, in a case where the conditions in sub-paragraph (2) are met, from those earnings plus whichever credit specified in paragraph (b) of that sub-paragraph is appropriate, up to a maximum deduction in respect of the applicant's family of whichever of the sums specified in sub-paragraph (3) applies in his case.

(2) The conditions of this paragraph are that—

- (a) the applicant's earnings which form part of his average weekly income are less than the lower of either his relevant child care charges or whichever of the deductions specified in sub-paragraph (3) otherwise applies in his case; and
- (b) that applicant or, if he is a member of a couple either the applicant or his partner, is in receipt of either working tax credit or child tax credit.

(3) The maximum deduction to which sub-paragraph (1)(c) above refers is to be—

- (a) where the applicant's family includes only one child in respect of whom relevant child care charges are paid, £175.00 per week;
- (b) where the applicant's family includes more than one child in respect of whom relevant child care charges are paid, £300 per week.

Treatment of child care charges

58.-(1) This paragraph applies where an applicant (within the meaning in this paragraph) is incurring relevant child care charges and—

- (a) is a lone parent and is engaged in remunerative work;
- (b) is a member of a couple both of whom are engaged in remunerative work; or
- (c) is a member of a couple where one member is engaged in remunerative work and the other—
 - (i) is incapacitated;
 - (ii) is an in-patient in hospital; or
 - (iii) is in prison (whether serving a custodial sentence or remanded in custody awaiting trial or sentence).

(2) For the purposes of sub-paragraph (1) and subject to sub-paragraph (4), a person to whom sub-paragraph

(3) applies must be treated as engaged in remunerative work for a period not exceeding 28 weeks during which he—

- (a) is paid statutory sick pay;
- (b) is paid short-term incapacity benefit at the lower rate under sections 30A to 30E of the SSCBA;
- (c) is paid an employment and support allowance;
- (d) is paid income support on the grounds of incapacity for work under regulation 4ZA of, and paragraph 7 or 14 of Schedule 1B to, the Income Support (General) Regulations 1987; or
- (e) is credited with earnings on the grounds of incapacity for work or limited capability for work under regulation 8B of the Social Security (Credits) Regulations 1975.

This sub-paragraph applies to a person who was engaged in remunerative work immediately before—

- (a) the first day of the period in respect of which he was first paid statutory sick pay, short-term incapacity benefit, an employment and support allowance or income support on the grounds of incapacity for work; or
- (b) the first day of the period in respect of which earnings are credited, as the case may be.

(4) In a case to which sub-paragraph (2)(d) or (e) applies, the period of 28 weeks begins on the day on which the person is first paid income support or on the first day of the period in respect of which earnings are credited, as the case may be.

(5) Relevant child care charges are those charges for care to which sub-paragraphs (6) and (7) apply and are to be calculated on a weekly basis in accordance with sub-paragraph (10).

(6) The charges are paid by the applicant for care which is provided—

- (a) in the case of any child of the applicant's family who is not disabled, in respect of the period beginning on that child's date of birth and ending on the day preceding the first Monday in September following that child's fifteenth birthday; or
- (b) in the case of any child of the applicant's family who is disabled, in respect of the period beginning on that person's date of birth and ending on the day preceding the first Monday in September following that person's sixteenth birthday.

(7) The charges are paid for care which is provided by one or more of the care providers listed in sub-paragraph (8) and are not paid—

- (a) in respect of the child's compulsory education;
- (b) by an applicant to a partner or by a partner to an applicant in respect of any child for whom either or any of them is responsible in accordance with paragraph 7 (circumstances in which a person is treated as responsible or not responsible for another); or
- (c) in respect of care provided by a relative of the child wholly or mainly in the child's home.

(8) The care to which sub-paragraph (7) refers may be provided—

- (a) (out of school hours, by a school on school premises or by a local authority—
 - (i) for children who are not disabled in respect of the period beginning on their eighth birthday and ending on the day preceding the first Monday in September following their fifteenth birthday; or
 - (ii) for children who are disabled in respect of the period beginning on their eighth birthday and ending on the day preceding the first Monday in September following their sixteenth birthday; or
- (b) by a child care provider approved in accordance with the Tax Credit (New Category of Child Care Provider) Regulations 1999; or
- (c) by persons registered under Part 2 of the Children and Families (Wales) Measure 2010; or
- (d) by a person who is excepted from registration under Part 2 of the Children and Families (Wales) Measure 2010 because the child care that person provides is in a school or establishment referred to in article 11, 12 or 14 of the Child Minding and Day Care Exceptions (Wales) Order 2010; or
- (e) by—
 - (i) persons registered under section 59(1) of the Public Services Reform (Scotland) Act 2010; or
 - (ii) local authorities registered under section 83(1) of that Act, where the care provided is child minding or day care of children within the meaning of that Act; or

- (f) by a person prescribed in regulations made pursuant to section 12(4) of the Tax Credits Act 2002; or
 - (g) by a person who is registered under Chapter 2 or 3 of Part 3 of the Childcare Act 2006; or
 - (h) by any of the schools mentioned in section 34(2) of the Childcare Act 2006 in circumstances where the requirement to register under Chapter 2 of Part 3 of that Act does not apply by virtue of section 34(2) of that Act; or
 - (i) by any of the schools mentioned in section 53(2) of the Childcare Act 2006 in circumstances where the requirement to register under Chapter 3 of Part 3 of that Act does not apply by virtue of section 53(2) of that Act; or
 - (j) by any of the establishments mentioned in section 18(5) of the Childcare Act 2006 in circumstances where the care is not included in the meaning of “childcare” for the purposes of Part 1 and Part 3 of that Act by virtue of that subsection; or
 - (k) by a foster parent or kinship carer under the Fostering Services Regulations 2011, the Fostering Services (Wales) Regulations 2003 or the Looked After Children (Scotland) Regulations 2009 in relation to a child other than one whom the foster parent is fostering or kinship carer is looking after; or
 - (l) by a provider of personal care within the meaning of paragraph 1 of Schedule 1 to the Health and Social Care Act 2008 (Regulated Activities) Regulations 2010 and being a regulated activity prescribed by those Regulations or by a person who is employed, or engaged under a contract for services, to provide care and support by the provider of a domiciliary support service within the meaning of Part 1 of the Regulation and Inspection of Social Care (Wales) Act 2016; or
 - (m) by a person who is not a relative of the child wholly or mainly in the child’s home.
- (9) In sub-paragraphs (6) and (8)(a), “the first Monday in September” means the Monday which first occurs in the month of September in any year.
- (10) Relevant child care charges must be estimated over such period, not exceeding a year, as is appropriate in order that the average weekly charge may be estimated accurately having regard to information as to the amount of that charge provided by the child minder or person providing the care.
- (11) For the purposes of sub-paragraph (1)(c) the other member of a couple is incapacitated where—
- (a) the applicant is a pensioner and the other member of the couple is aged not less than 80;
 - (b) the applicant is a pensioner and the other member of the couple is aged less than 80, and—
 - (i) the additional condition specified in paragraph 10 of Schedule 3 (additional condition for the disability premium) to this scheme is treated as applying in his case; and
 - (ii) he satisfies that conditions or would satisfy it but for his being treated as capable of work by virtue of a determination made in accordance with regulations made under section 171E of the SSCBA;
 - (c) the applicant is not a pensioner, the applicant’s applicable amount includes a disability premium on account of the other member’s incapacity or the support component or the work-related activity component on account of his having limited capability for work;
 - (d) the applicant is not a pensioner, the applicant’s applicable amount would include a disability premium on account of the other member’s incapacity but for that other member being treated as capable of work by virtue of a determination made in accordance with regulations made under section 171E of the SSCBA;
 - (e) the applicant’s applicable amount would include the support component or the work-related activity component on account of the other member having limited capability for work but for that other member being treated as not having limited capability for work by virtue of a determination made in accordance with the Employment and Support Allowance Regulations 2008;
 - (f) he is, or is treated as, incapable of work and has been so incapable, or has been so treated as incapable, of work in accordance with the provisions of, and regulations made under, Part 12A of the SSCBA (incapacity for work) for a continuous period of not less than 196 days; and for this purpose, any two or more separate periods separated by a break of not more than 56 days must be treated as one continuous period;
 - (g) he is, or is treated as having, limited capability for work and has had, or been treated as having, limited capability for work in accordance with the Employment and Support Allowance Regulations 2008 for a continuous period of not less than 196 days and for this purpose any two or more separate periods separated by a break of not more than 84 days must be treated as one continuous period;
 - (h) there is payable in respect of him one or more of the following pensions or allowances—

- (i) long-term incapacity benefit or short-term incapacity benefit at the higher rate under Schedule 4 to the SSCBA;
- (ii) attendance allowance under section 64 of the SSCBA;
- (iii) severe disablement allowance under section 68 of the SSCBA;
- (iv) disability living allowance under section 71 of the SSCBA;
- (v) personal independence payment;
- (vi) an AFIP;
- (vii) increase of disablement pension under section 104 of the SSCBA;
- (viii) a pension increase paid as part of a war disablement pension or under an industrial injuries scheme which is analogous to an allowance or increase of disablement pension under sub-paragraph (ii), (iv), (v) or (vii) above;
- (ix) main phase employment and support allowance;
- (x) adult disability payment

- (i) a pension or allowance to which sub-paragraph (vii) or (viii) of paragraph (h) above refers was payable on account of his incapacity but has ceased to be payable in consequence of his becoming a patient, which in this paragraph means a person (other than a person who is serving a sentence of imprisonment or detention in a youth custody institution) who is regarded as receiving free in-patient treatment within the meaning of regulation 2(4) and (5) of the Social Security (Hospital In-Patients) Regulations 2005;
 - (j) an attendance allowance under section 64 of the SSCBA or disability living allowance would be payable to that person but for—
 - (i) a suspension of benefit in accordance with regulations under section 113(2) of the SSCBA; or
 - (ii) an abatement as a consequence of hospitalisation;
 - (k) the daily living component of personal independence payment would be payable to that person but for a suspension of benefit in accordance with regulations under section 86 of the Welfare Reform Act 2012 (hospital in-patients);
 - (l) an AFIP would be payable to that person but for any suspension of payment in accordance with any terms of the armed and reserve forces compensation scheme which allow for a suspension because a person is undergoing medical treatment in a hospital or similar institution;
 - (m) paragraph (h), (i), (j) or (k) would apply to him if the legislative provisions referred to in those paragraphs were provisions under any corresponding enactment having effect in Northern Ireland; or
 - (n) he has an invalid carriage or other vehicle provided to him by the Secretary of State or a clinical commissioning group under paragraph 9 of Schedule 1 to the National Health Service Act 2006 or under section 46 of the National Health Service (Scotland) Act 1978 or provided by the Department of Health, Social Services and Public Safety in Northern Ireland under Article 30(1) of the Health and Personal Social Services (Northern Ireland) Order 1972.
- (12) For the purposes of sub-paragraph (11), once sub-paragraph (11)(f) applies to the person, if he then ceases, for a period of 56 days or less, to be incapable, or to be treated as incapable, of work, that sub-paragraph is, on his again becoming so incapable, or so treated as incapable, of work at the end of that period, immediately thereafter to apply to him for so long as he remains incapable, or is treated as remaining incapable, of work.
- (13) For the purposes of sub-paragraph (11), once sub-paragraph (11)(g) applies to the person, if he then ceases, for a period of 84 days or less, to have, or to be treated as having, limited capability for work, that paragraph is, on his again having, or being treated as having, limited capability for work at the end of that period, immediately thereafter to apply to him for so long as he has, or is treated as having, limited capability for work.
- (14) For the purposes of sub-paragraphs (6) and (8)(a), a person is disabled if he is a person—
- (a) to whom an attendance allowance or the care component of disability allowance is payable or would be payable but for—
 - (i) a suspension of benefit in accordance with regulations under section 113(2) of the SSCBA; or
 - (ii) an abatement as a consequence of hospitalisation;
 - (b) to whom the daily living component of personal independence payment is payable or would be payable but for a suspension of benefit in accordance with regulations under section 86 of the Welfare Reform Act 2012 (hospital in-patients);
 - (ba) in respect of whom adult disability payment is payable or has ceased to be payable solely by virtue of regulation 28 (effect of admission to hospital on ongoing entitlement to Adult Disability Payment) of the DAWAP Regulations

- (c) who is registered as blind in a register compiled under section 29 of the National Assistance Act 1948 (welfare services) or, in Scotland, has been certified as blind and in consequence he is registered as blind in a register maintained by or on behalf of a council constituted under section 2 of the Local Government (Scotland) Act 1994; or
- (d) who ceased to be registered as blind in such a register within the period beginning 28 weeks before the first Monday in September following that person's fifteenth birthday and ending on the day preceding that person's sixteenth birthday.

(15) For the purposes of sub-paragraph (1) a person on maternity leave, paternity leave or adoption leave is to be treated as if he is engaged in remunerative work for the period specified in sub-paragraph (16) ("the relevant period") provided that—

- (a) in the week before the period of maternity leave, paternity leave or adoption leave began he was in remunerative work;
- (b) the applicant is incurring relevant child care charges within the meaning of sub-paragraph (5); and
- (c) he is entitled to either statutory maternity pay under section 164 of the SSCBA, ordinary statutory paternity pay by virtue of section 171ZA or 171ZB of that Act, additional statutory paternity pay by virtue of section 171ZEA or 171ZEB of that Act, statutory adoption pay by of section 171ZL of that Act, maternity allowance under section 35 of that Act or qualifying support.

(16) For the purposes of sub-paragraph (15) the relevant period begins on the day on which the person's maternity, paternity leave or adoption leave commences and ends on—

- (a) the date that leave ends;
- (b) if no child care element of working tax credit is in payment on the date that entitlement to maternity allowance, qualifying support, statutory maternity pay, ordinary or additional statutory paternity pay or statutory adoption pay ends, the date that entitlement ends; or
- (c) if a child care element of working tax credit is in payment on the date that entitlement to maternity allowance or qualifying support, statutory maternity pay, ordinary or additional statutory paternity pay or statutory adoption pay ends, the date that entitlement to that award of the child care element of the working tax credit ends, whichever occurs first.

(17) In sub-paragraphs (15) and (16)—

- (a) "qualifying support" means income support to which that person is entitled by virtue of paragraph 14B of Schedule 1B to the Income Support (General) Regulations 1987; and
- (b) "child care element" of working tax credit means the element of working tax credit prescribed under section 12 of the Tax Credits Act 2002 (child care element).

(18) In this paragraph "applicant" does not include an applicant—

- (a) who has, or
- (b) who (jointly with his partner) has,
- (c) an award of universal credit.

Calculation of average weekly income from tax credits

59.—(1) This paragraph applies where an applicant receives a tax credit.

(2) Where this paragraph applies, the period over which a tax credit is to be taken into account is the period set out in sub-paragraph (3).

(3) Where the instalment in respect of which payment of a tax credit is made is—

- (a) a daily instalment, the period is 1 day, being the day in respect of which the instalment is paid;
- (b) a weekly instalment, the period is 7 days, ending on the day on which the instalment is due to be paid;
- (c) a two weekly instalment, the period is 14 days, commencing 6 days before the day on which the instalment is due to be paid;
- (d) a four weekly instalment, the period is 28 days, ending on the day on which the instalment is due to be paid.

(4) For the purposes of this paragraph "tax credit" means child tax credit or working tax credit.

Disregard of changes in tax, contributions etc.

60. In calculating the applicant's income the authority may disregard any legislative change—
- (a) in the basic or other rates of income tax;
 - (b) in the amount of any personal tax relief;
 - (c) in the rates of social security contributions payable under the SSCBA or in the lower earnings limit or upper earnings limit for Class 1 contributions under that Act, the lower or upper limits applicable to Class 4 contributions under that Act or the amount specified in section 11(4) of that Act (small profits threshold in relation to Class 2 contributions);
 - (d) in the amount of tax payable as a result of an increase in the weekly rate of Category A, B, C or D retirement pension or any addition thereto or any graduated pension payable under the SSCBA;
 - (e) in the maximum rate of child tax credit or working tax credit, for a period not exceeding 30 reduction weeks beginning with the reduction week immediately following the date from which the change is effective.

Calculation of net profit of self-employed earners

- 61.—(1) For the purposes of paragraphs 48 (average weekly earnings of self-employed earners: persons who are not pensioners) and 57 (calculation of income on a weekly basis) the earnings of an applicant to be taken into account must be—
- (a) in the case of a self-employed earner who is engaged in employment on his own account, the net profit derived from that employment;
 - (b) in the case of a self-employed earner who is a pensioner whose employment is carried on in partnership, his share of the net profit derived from that employment, less—
 - (i) an amount in respect of income tax and of social security contributions payable under the SSCBA calculated in accordance with paragraph 62 (deduction of tax and contributions of self-employed earners); and
 - (ii) one-half of the amount calculated in accordance with sub-paragraph (11) in respect of any qualifying premium;
 - (c) in the case of a self-employed earner who is not a pensioner whose employment is carried on in partnership or is that of a share fisherman within the meaning of the Social Security (Mariners' Benefits) Regulations 1975, his share of the net profit derived from that employment, less—
 - (i) an amount in respect of income tax and of social security contributions payable under the SSCBA calculated in accordance with paragraph 62 (deduction of tax and contributions for self-employed earners); and
 - (ii) one-half of the amount calculated in accordance with sub-paragraph (11) in respect of any qualifying premium.
- (2) There must be disregarded from the net profit of an applicant who is not a pensioner, any sum, where applicable, specified in paragraphs 1 to 16 of Schedule 7 (sums disregarded in the calculation of earnings: persons who are not pensioners).
- (3) For the purposes of sub-paragraph (1)(a) the net profit of the employment must, except where sub-paragraph (9) applies, be calculated by taking into account the earnings of the employment over the assessment period less—
- (a) subject to sub-paragraphs (5) to (8), any expenses wholly and exclusively incurred in that period for the purposes of that employment;
 - (b) an amount in respect of—
 - (i) income tax; and
 - (ii) social security contributions payable under the SSCBA, calculated in accordance with paragraph 62 (deduction of tax and contributions for self-employed earners); and
 - (c) one-half of the amount calculated in accordance with sub-paragraph (11) in respect of any qualifying premium.
- (4) For the purposes of sub-paragraph (1)(b) the net profit of the employment is to be calculated by taking into account the earnings of the employment over the assessment period less, subject to sub-paragraphs (5) to (8), any expenses wholly and exclusively incurred in that period for the purposes of the employment.
- (5) Subject to sub-paragraph (6), no deduction is to be made under sub-paragraph (3)(a) or (4), in respect of—

- (a) any capital expenditure;
 - (b) the depreciation of any capital asset;
 - (c) any sum employed or intended to be employed in the setting up or expansion of the employment;
 - (d) any loss incurred before the beginning of the assessment period;
 - (e) the repayment of capital on any loan taken out for the purposes of the employment;
 - (f) any expenses incurred in providing business entertainment; and
 - (g) in the case of an applicant who is not a pensioner, any debts, except bad debts proved to be such, but this paragraph does not apply to any expenses incurred in the recovery of a debt.
- (6) A deduction is to be made under sub-paragraph (3)(a) or (4) in respect of the repayment of capital on any loan used for—
- (a) the replacement in the course of business of equipment or machinery; or
 - (b) the repair of an existing business asset except to the extent that any sum is payable under an insurance policy for its repair.
- (7) The authority must refuse to make a deduction in respect of any expenses under sub-paragraph (3)(a) or (4) where it is not satisfied given the nature and the amount of the expense that it has been reasonably incurred.
- (8) For the avoidance of doubt—
- (a) a deduction must not be made under sub-paragraph (3)(a) or (4) in respect of any sum unless it has been expended for the purposes of the business;
 - (b) a deduction must be made thereunder in respect of—
 - (i) the excess of any value added tax paid over value added tax received in the assessment period;
 - (ii) any income expended in the repair of an existing business asset except to the extent that any sum is payable under an insurance policy for its repair;
 - (iii) any payment of interest on a loan taken out for the purposes of the employment.
- (9) Where an applicant is engaged in employment as a child minder the net profit of the employment is to be one-third of the earnings of that employment, less—
- (a) an amount in respect of—
 - (i) income tax; and
 - (ii) social security contributions payable under the SSCBA,
 - (iii) calculated in accordance with paragraph 62 (deduction of tax and contributions for self-employed earners); and
 - (b) one-half of the amount calculated in accordance with sub-paragraph (11) in respect of any qualifying premium.
- (10) For the avoidance of doubt where an applicant is engaged in employment as a self-employed earner and he is also engaged in one or more other employments as a self-employed or employed earner any loss incurred in any one of his employments must not be offset against his earnings in any other of his employments.
- (11) The amount in respect of any qualifying premium is to be calculated by multiplying the daily amount of the qualifying premium by the number equal to the number of days in the assessment period; and for the purposes of this paragraph the daily amount of the qualifying premium must be determined—
- (a) where the qualifying premium is payable monthly, by multiplying the amount of the qualifying premium by 12 and dividing the product by 365;
 - (b) in any other case, by dividing the amount of the qualifying premium by the number equal to the number of days in the period to which the qualifying premium relates.
- (12) In this paragraph, “qualifying premium” means any premium which is payable periodically in respect of a personal pension scheme and is so payable on or after the date of application.

Calculation of deduction of tax and contributions of self-employed earners

- 62.—(1) The amount to be deducted in respect of income tax under paragraph 61(1)(b)(i), (3)(b)(i) or (9)(a)(i) (calculation of net profit of self-employed earners) must be calculated—
- (a) on the basis of the amount of chargeable income, and

- (b) as if that income were assessable to income tax at the basic rate or in the case of a Scottish taxpayer the Scottish basic rate of tax applicable to the assessment period less only the personal relief to which the applicant is entitled under sections 35 to 37 of the Income Tax Act 2007 (personal allowances) as is appropriate to his circumstances.
- (2) But, if the assessment period is less than a year, the earnings to which the basic rate of tax is to be applied and the amount of the personal reliefs deductible under this paragraph must be calculated on a pro rata basis.
- (3) The amount to be deducted in respect of social security contributions under paragraph 60(1)(b)(i), (3)(b)(ii) or (9)(a)(ii) is the total of—
- (a) the amount of Class 2 contributions payable under section 11(2) or, as the case may be, 11(8) of the SSCBA at the rate applicable to the assessment period except where the applicant’s chargeable income is less than the amount specified in section 11(4) of that Act (small earnings exception) for the tax year applicable to the assessment period; but if the assessment period is less than a year, the amount specified for that tax year must be reduced pro rata; and
 - (b) the amount of Class 4 contributions (if any) which would be payable under section 15 of the SSCBA (Class 4 contributions recoverable under the Income Tax Acts) at the percentage rate applicable to the assessment period on so much of the chargeable income as exceeds the lower limit but does not exceed the upper limit of profits and gains applicable for the tax year applicable to the assessment period; but if the assessment period is less than a year, those limits must be reduced pro rata.
- (4) In this paragraph “chargeable income” means—
- (a) except where paragraph (b) applies, the earnings derived from the employment less any expenses deducted under sub-paragraph (3)(a) or, as the case may be, (5) of paragraph 61;
 - (b) in the case of employment as a child minder, one-third of the earnings of that employment.

CHAPTER 7 Capital Calculation of capital

- 63.—(1) The capital of an applicant to be taken into account must be, subject to sub-paragraph (2), the whole of his capital calculated in accordance with this Part and (in the case of persons who are not pensioners) any income treated as capital under paragraph 64 (income treated as capital: persons who are not pensioners).
- (2) There must be disregarded from the calculation of an applicant’s capital under sub-paragraph (1), any capital, where applicable, specified in—
- (a) Schedule 9, in relation to pensioners;
 - (b) Schedule 10, in relation to persons who are not pensioners.
- (3) In the case of an applicant who is a pensioner, his capital is to be treated as including any payment made to him by way of arrears of—
- (i) child tax credit;
 - (ii) working tax credit;
 - (iii) state pension credit,
- if the payment was made in respect of a period for the whole or part of which a reduction under this scheme was allowed before those arrears were paid.
- (4) The capital of a child or young person who is a member of the family of an applicant who is not a pensioner must not be treated as capital of the applicant.

Income treated as capital: persons who are not pensioners.

- 64.—(1) This paragraph applies in relation to persons who are not pensioners.
- (2) Any bounty derived from employment to which paragraph 9 of Schedule 7 (sums disregarded in the calculation of earnings: persons who are not pensioners) applies and paid at intervals of at least one year is to be treated as capital.
- (3) Any amount by way of a refund of income tax deducted from profits or emoluments chargeable to income tax under Schedule D or E is to be treated as capital.

- (4) Any holiday pay which is not earnings under paragraph 41(1)(d) or 51(1)(d) (earnings of employed earners) is to be treated as capital.
- (5) Except any income derived from capital disregarded under paragraphs 4, 5, 7, 11, 17, 30 to 33, 50 or 51 of Schedule 10 (capital disregards: persons who are not pensioners), any income derived from capital is to be treated as capital but only from the date it is normally due to be credited to the applicant's account.
- (6) In the case of employment as an employed earner, any advance of earnings or any loan made by the applicant's employer is to be treated as capital.
- (7) Any charitable or voluntary payment which is not made or due to be made at regular intervals, other than a payment which is made under or by the Trusts, the Fund, the Eileen Trust, MFET Limited, the Skipton Fund, the Caxton Foundation, the Independent Living Fund (2006) or the London Bombings Charitable Relief Fund, is to be treated as capital.
- (8) There is to be treated as capital the gross receipts of any commercial activity carried on by a person in respect of which assistance is received under the self-employment route, but only in so far as those receipts were payable into a special account during the period in which that person was receiving such assistance.
- (9) Any arrears of subsistence allowance which are paid to an applicant as a lump sum must be treated as capital.
- (10) Any arrears of working tax credit or child tax credit must be treated as capital.

Calculation of capital in the United Kingdom

65. Capital which an applicant possesses in the United Kingdom is to be calculated at its current market or surrender value less—
 - (a) where there would be expenses attributable to the sale, 10 per cent; and
 - (b) the amount of any encumbrance secured on it.

Calculation of capital outside the United Kingdom

66. Capital which an applicant possesses in a country outside the United Kingdom must be calculated—
 - (a) in a case where there is no prohibition in that country against the transfer to the United Kingdom of an amount equal to its current market or surrender value in that country, at that value;
 - (b) in a case where there is such a prohibition, at the price which it would realise if sold in the United Kingdom to a willing buyer, less, where there would be expenses attributable to sale, 10 per cent and the amount of any encumbrances secured on it.

Notional capital

- 67.—(1) An applicant is to be treated as possessing capital of which he has deprived himself for the purpose of securing entitlement to a reduction or increasing the amount of that reduction except to the extent that that capital is reduced in accordance with paragraph 68 (diminishing notional capital rule).
- (2) A person who is a pensioner who disposes of capital for the purpose of—
 - (a) reducing or paying a debt owed by the applicant; or
 - (b) purchasing goods or services if the expenditure was reasonable in the circumstances of the applicant's case,
 is to be regarded as not depriving himself of it.
- (3) Sub-paragraphs (4) to (6) apply in relation to applicants who are not pensioners.
- (4) Except in the case of—
 - (a) a discretionary trust; or

- (b) a trust derived from a payment made in consequence of a personal injury; or
 - (c) any loan which would be obtained only if secured against capital disregarded under Schedule 9; or
 - (d) a personal pension scheme, occupational pension scheme or a payment made by the Board of the Pension Protection Fund; or
 - (e) any sum to which paragraph 50(2)(a) of Schedule 10 (capital disregards: persons who are not pensioners) applies which is administered in the way referred to in paragraph 50(1)(a); or
 - (f) any sum to which paragraph 51(a) of Schedule 10 refers; or
 - (g) child tax credit; or
 - (h) working tax credit,
- any capital which would become available to the applicant upon application being made, but which has not been acquired by him, is to be treated as possessed by him but only from the date on which it could be expected to be acquired were an application made.

- (5) Any payment of capital, other than a payment of capital specified in sub-paragraph (6), made—
- (a) to a third party in respect of a single applicant or a member of the family (but not a member of the third party's family) must, where that payment is a payment of an occupational pension, a pension or other periodical payment made under a personal pension scheme or a payment made by the Board of the Pension Protection Fund, be treated as possessed by that single applicant or, as the case may be, by that member;
 - (b) to a third party in respect of a single applicant or in respect of a member of the family (but not a member of the third party's family) must, where it is not a payment referred to in paragraph (a), be treated as possessed by that single applicant or by that member to the extent that it is used for the food, ordinary clothing or footwear, household fuel or rent of that single applicant or, as the case may be, of any member of that family or is used for any council tax or water charges for which that applicant or member is liable;
 - (c) to a single applicant or a member of the family in respect of a third party (but not in respect of another member of the family) must be treated as possessed by that single applicant or, as the case may be, that member of the family to the extent that it is kept or used by him or used by or on behalf of any member of the family.
- (6) Sub-paragraph (5) does not apply in respect of a payment of capital made—
- (a) under or by any of the Trusts, the Fund, the Eileen Trust, MFET Limited, the Independent Living Fund (2006), the Skipton Fund, the Caxton Foundation, or the London Bombings Relief Charitable Fund;
 - (b) pursuant to section 2 of the Employment and Training Act 1973 in respect of a person's participation—
 - (i) in an employment programme specified in regulation 75(1)(a)(ii) of the Jobseeker's Allowance Regulations 1996;
 - (ii) in a training scheme specified in regulation 75(1)(b)(ii) of those Regulations;
 - (iii) in the Intense Activity Period specified in regulation 75(1)(a)(iv) of those Regulations;
 - (iv) in a qualifying course within the meaning specified in regulation 17A(7) of those Regulations; or
 - (v) in the Flexible New Deal specified in regulation 75(1)(a)(v) of those Regulations;
 - (c) in respect of a person's participation in the Work for Your Benefit Pilot Scheme;
 - (d) in respect of a person's participation in the Mandatory Work Activity Scheme;
 - (e) in respect of an applicant's participation in the Employment, Skills, and Enterprise Scheme;
 - (f) under an occupational pension scheme, in respect of a pension or other periodical payment made under a personal pension scheme or a payment made by the Board of the Pension Protection Fund where—
 - (i) a bankruptcy order has been made in respect of the person in respect of whom the payment has been made or, in Scotland, the estate of that person is subject to sequestration or a judicial factor has been appointed on that person's estate under section 41 of the Solicitors (Scotland) Act 1980;
 - (ii) the payment is made to the trustee in bankruptcy or any other person acting on behalf of the creditors; and
 - (iii) the person referred to in sub-paragraph (i) and any member of his family does not possess, or is not treated as possessing, any other income apart from that payment.
- (7) Where an applicant stands in relation to a company in a position analogous to that of a sole owner or partner in the business of that company, he may be treated as if he were such sole owner or partner and in such a case—

- (a) the value of his holding in that company must, notwithstanding paragraph 63 (calculation of capital) be disregarded; and
 - (b) he must, subject to sub-paragraph (8), be treated as possessing an amount of capital equal to the value or, as the case may be, his share of the value of the capital of that company and the foregoing provisions of this Chapter apply for the purposes of calculating that amount as if it were actual capital which he does possess.
- (8) For so long as the applicant undertakes activities in the course of the business of the company, the amount which he is treated as possessing under sub-paragraph (7) is to be disregarded.
- (9) Where an applicant is treated as possessing capital under any of sub-paragraphs (1), (4) or (5) the foregoing provisions of this Chapter apply for the purposes of calculating its amount as if it were actual capital which he does possess.

Diminishing notional capital rule: pensioners

- 68.—(1) Where an applicant who is a pensioner is treated as possessing capital under paragraph 67(1) (notional capital), the amount which he is treated as possessing—
- (a) in the case of a week that is subsequent to—
 - (i) the relevant week in respect of which the conditions set out in sub-paragraph (2) are satisfied; or
 - (ii) a week which follows that relevant week and which satisfies those conditions, is to be reduced by an amount determined under sub-paragraph (3);
 - (b) in the case of a week in respect of which sub-paragraph (1)(a) does not apply but where—
 - (i) that week is a week subsequent to the relevant week; and
 - (ii) that relevant week is a week in which the condition in sub-paragraph (4) is satisfied, is to be reduced by the amount determined under sub-paragraph (5).
- (2) This sub-paragraph applies to a reduction week where the applicant satisfies the conditions that—
- (a) he is in receipt of a reduction under this scheme; and
 - (b) but for paragraph 67(1), he would have received a greater reduction in council tax under this scheme in that week.
- (3) In a case to which sub-paragraph (2) applies, the amount of the reduction in the amount of capital he is treated as possessing for the purposes of sub-paragraph (1)(a) must be equal to the aggregate of—
- (a) an amount equal to the additional amount of the reduction in council tax to which sub-paragraph (2)(b) refers;
 - (b) where the applicant has also claimed state pension credit, the amount of any state pension credit or any additional amount of state pension credit to which he would have been entitled in respect of the reduction week to which sub-paragraph (2) refers but for the application of regulation 21(1) of the State Pension Credit Regulations 2002 (notional capital);
 - (c) where the applicant has also claimed housing benefit, the amount of any housing benefit or any additional amount of housing benefit to which he would have been entitled in respect of the whole or part of the reduction week to which sub-paragraph (2) refers but for the application of regulation 47(1) of the Housing Benefit (Persons who have attained the qualifying age for state pension credit) Regulations 2006 (notional capital);
 - (d) where the applicant has also claimed a jobseeker's allowance, the amount of an income-based jobseeker's allowance to which he would have been entitled in respect of the reduction week to which sub-paragraph (2) refers but for the application of regulation 113 of the Jobseeker's Allowance Regulations 1996 (notional capital); and
 - (e) where the applicant has also claimed an employment and support allowance, the amount of an income-related employment and support allowance to which he would have been entitled in respect of the reduction week to which sub-paragraph (2) refers but for the application of regulation 115 of the Employment and Support Allowance Regulations 2008 (notional capital).
- (4) Subject to sub-paragraph (7), for the purposes of sub-paragraph (1)(b) the condition is that the applicant is a pensioner and would have been entitled to a reduction in council tax under this scheme in the relevant week but for paragraph 67(1).
- (5) In such a case the amount of the reduction in the amount of capital he is treated as possessing for the purposes of sub-paragraph (1)(b) is equal to the aggregate of—
- (a) the amount of the reduction in council tax to which the applicant would have been entitled in the relevant week but for paragraph 67(1);

- (b) if the applicant would, but for regulation 21 of the State Pension Credit Regulations 2002, have been entitled to state pension credit in respect of the benefit week, within the meaning of regulation 1(2) of those Regulations (interpretation), which includes the last day of the relevant week, the amount to which he would have been entitled;
 - (c) if the applicant would, but for regulation 47(1) of the Housing Benefit (Persons who have attained the qualifying age for state pension credit) Regulations 2006, have been entitled to housing benefit or to an additional amount of housing benefit in respect of the benefit week which includes the last day of the relevant week, the amount which is equal to—
 - (i) in a case where no housing benefit is payable, the amount to which he would have been entitled; or
 - (ii) in any other case, the amount equal to the additional amount of housing benefit to which he would have been entitled;
 - (d) if the applicant would, but for regulation 113 of the Jobseeker’s Allowance Regulations 1996, have been entitled to an income-based jobseeker’s allowance in respect of the benefit week, within the meaning of regulation 1(3) of those Regulations (interpretation), which includes the last day of the relevant week, the amount to which he would have been entitled; and
 - (e) if the applicant would, but for regulation 115 of the Employment and Support Allowance Regulations 2008, have been entitled to an income-related employment and support allowance in respect of the benefit week, within the meaning of regulation 2(1) of those Regulations (interpretation), which includes the last day of the relevant week, the amount to which he would have been entitled.
- (6) But if the amount mentioned in paragraph (a), (b), (c), (d) or (e) of sub-paragraph (5) (“the relevant amount”) is in respect of a part-week, the amount that is to be taken into account under that paragraph is to be determined by—
- (a) dividing the relevant amount by the number equal to the number of days in that part-week, and
 - (b) multiplying the result of that calculation by 7.
- (7) The amount determined under sub-paragraph (5) is to be re-determined under that sub-paragraph if the applicant makes a further application and the conditions in sub-paragraph (8) are satisfied, and in such a case—
- (a) paragraphs (a) to (e) of sub-paragraph (5) apply as if for the words “relevant week” there were substituted the words “relevant subsequent week”; and
 - (b) subject to sub-paragraph (9), the amount as re-determined has effect from the first week following the relevant subsequent week in question.
- (8) The conditions are that—
- (a) a further application is made 26 or more weeks after—
 - (i) the date on which the applicant made an application in respect of which he was first treated as possessing the capital in question under paragraph 67(1);
 - (ii) in a case where there has been at least one re-determination in accordance with sub-paragraph (11), the date on which he last made an application which resulted in the weekly amount being re-determined, or
 - (iii) the date on which he last ceased to be entitled to a reduction under this scheme, whichever last occurred; and
 - (b) the applicant would have been entitled to a reduction under this scheme but for paragraph 67(1).
- (9) The amount as re-determined pursuant to sub-paragraph (7) must not have effect if it is less than the amount which applied in that case immediately before the re-determination and in such a case the higher amount must continue to have effect.
- (10) For the purposes of this paragraph—
- “part-week”—
- (a) in relation to an amount mentioned in sub-paragraph (5)(a), means a period of less than a week for which a reduction in council tax under this scheme is allowed;
 - (b) in relation to an amount mentioned in sub-paragraph (5)(b), means a period of less than a week for which housing benefit is payable;
 - (c) in relation to an amount mentioned in sub-paragraph (5)(c), (d) or (e), means—
 - (i) a period of less than a week which is the whole period for which income support, an income-related employment and support allowance or, as the case may be, an income-based jobseeker’s allowance is payable; and
 - (ii) any other period of less than a week for which it is payable;

“relevant week” means the reduction week or part-week in which the capital in question of which the applicant has deprived himself within the meaning of paragraph 67(1)–

- (a) was first taken into account for the purpose of determining his entitlement to a reduction; or
- (b) was taken into account on a subsequent occasion for the purpose of determining or re-determining his entitlement to a reduction on that subsequent occasion and that determination or re-determination resulted in his beginning to receive, or ceasing to receive, a reduction;

and where more than one reduction week is identified by reference to paragraphs (a) and (b) of this definition, the later or latest such reduction week or, as the case may be, the later or latest such part-week is the relevant week;

“relevant subsequent week” means the reduction week or part-week which includes the day on which the further application or, if more than one further application has been made, the last such application was made.

Diminishing notional capital rule: persons who are not pensioners.

69.–(1) Where an applicant who is not a pensioner is treated as possessing capital under paragraph 67(1) (notional capital), the amount which he is treated as possessing–

- (a) in the case of a week that is subsequent to–
 - (i) the relevant week in respect of which the conditions set out in sub-paragraph (2) are satisfied; or
 - (ii) a week which follows that relevant week and which satisfies those conditions,
is to be reduced by an amount determined under sub-paragraph (3);
- (b) in the case of a week in respect of which sub-paragraph (1)(a) does not apply but where–
 - (i) that week is a week subsequent to the relevant week; and
 - (ii) that relevant week is a week in which the condition in sub-paragraph (4) is satisfied,
is to be reduced by the amount determined under sub-paragraph (5).

(2) This sub-paragraph applies to a reduction week (or, in the case of persons who are not pensioners, part-week) where the applicant satisfies the conditions that–

- (a) he is in receipt of a reduction in council tax under this scheme; and
- (b) but for paragraph 67(1), he would have received a greater reduction in council tax under this scheme in that week.

(3) In a case to which sub-paragraph (2) applies, the amount of the reduction in the amount of capital he is treated as possessing for the purposes of sub-paragraph (1)(a) is equal to the aggregate of–

- (a) an amount equal to the additional amount of the reduction in council tax to which sub-paragraph (2)(b) refers;
- (b) where the applicant has also claimed housing benefit, the amount of any housing benefit or any additional amount of that benefit to which he would have been entitled in respect of the whole or part of the reduction week to which sub-paragraph (2) refers but for the application of regulation 49(1) of the Housing Benefit Regulations 2006 (notional capital);
- (c) where the applicant has also claimed income support, the amount of income support to which he would have been entitled in respect of the whole or part of the reduction week to which sub-paragraph (2) refers but for the application of regulation 51(1) of the Income Support (General) Regulations 1987 (notional capital);
- (d) where the applicant has also claimed a jobseeker’s allowance, the amount of an income-based jobseeker’s allowance to which he would have been entitled in respect of the whole or part of the reduction week to which sub-paragraph (2) refers but for the application of regulation 113 of the Jobseeker’s Allowance Regulations 1996 (notional capital); and
- (e) where the applicant has also claimed an employment and support allowance, the amount of an income-related employment and support allowance to which he would have been entitled in respect of the whole or part of the reduction week to which sub-paragraph (2) refers but for the application of regulation 115 of the Employment and Support Allowance Regulations 2008 (notional capital).

(4) Subject to sub-paragraph (7), for the purposes of sub-paragraph (1)(b) the condition is that the applicant is not a pensioner and would have been entitled to a reduction in council tax in the relevant week but for paragraph 67(1).

- (5) In such a case the amount of the reduction in the amount of capital he is treated as possessing must be equal to the aggregate of—
- (a) the amount of council tax benefit to which the applicant would have been entitled in the relevant week but for paragraph 67(1);
 - (b) if the applicant would, but for regulation 49(1) of the Housing Benefit Regulations 2006, have been entitled to housing benefit or to an additional amount of housing benefit in respect of the benefit week which includes the last day of the relevant week, the amount which is equal to—
 - a. (i) in a case where no housing benefit is payable, the amount to which he would have been entitled; or
 - b. (ii) in any other case, the amount equal to the additional amount of housing benefit to which he would have been entitled;
 - (c) if the applicant would, but for regulation 51(1) of the Income Support (General) Regulations 1987, have been entitled to income support in respect of the benefit week, within the meaning of regulation 2(1) of those Regulations (interpretation), which includes the last day of the relevant week, the amount to which he would have been entitled;
 - (d) if the applicant would, but for regulation 113 of the Jobseeker’s Allowance Regulations 1996, have been entitled to an income-based jobseeker’s allowance in respect of the benefit week, within the meaning of regulation 1(3) of those Regulations (interpretation), which includes the last day of the relevant week, the amount to which he would have been entitled; and
 - (e) if the applicant would, but for regulation 115 of the Employment and Support Allowance Regulations 2008, have been entitled to an income-related employment and support allowance in respect of the benefit week, within the meaning of regulation 2(1) of those Regulations (interpretation), which includes the last day of the relevant week, the amount to which he would have been entitled.
- (6) But if the amount mentioned in paragraph (a), (b), (c), (d) or (e) of sub-paragraph (5) (“the relevant amount”) is in respect of a part-week, the amount that is to be taken into account under that paragraph is to be determined by—
- (a) dividing the relevant amount by the number equal to the number of days in that part-week, and
 - (b) multiplying the result of that calculation by 7.
- (7) The amount determined under sub-paragraph (5) is to be re-determined under the appropriate sub-paragraph if the applicant makes a further application and the conditions in sub-paragraph (8) are satisfied, and in such a case—
- (a) paragraphs (a) to (e) of sub-paragraph (5) apply as if for the words “relevant week” there were substituted the words “relevant subsequent week”; and
 - (b) subject to sub-paragraph (9), the amount as re-determined has effect from the first week following the relevant subsequent week in question.
- (8) The conditions are that—
- (a) a further application is made 26 or more weeks after—
 - (i) the date on which the applicant made an application for a reduction under this scheme in respect of which he was first treated as possessing the capital in question under paragraph 67(1);
 - (ii) in a case where there has been at least one re-determination in accordance with sub-paragraph (7), the date on which he last made an application under this scheme which resulted in the weekly amount being re-determined, or
 - (iii) the date on which he last ceased to be entitled to a reduction under this scheme, whichever last occurred; and
 - (b) the applicant would have been entitled to a reduction under this scheme but for paragraph 67(1).
- (9) The amount as re-determined pursuant to sub-paragraph (6) must not have effect if it is less than the amount which applied in that case immediately before the re-determination and in such a case the higher amount must continue to have effect.
- (10) For the purposes of this paragraph—
- “part-week”—
- (a) in relation to an amount mentioned in sub-paragraph (5)(a), means a period of less than a week for which a reduction under this scheme is allowed;
 - (b) in relation to an amount mentioned in sub-paragraph (5)(b), means a period of less than a week for which housing benefit is payable;

- (c) in relation to an amount mentioned in sub-paragraph (5)(c), (d) or (e), means—
- (a) a period of less than a week which is the whole period for which income support, an income-related employment and support allowance or, as the case may be, an income-based jobseeker's allowance is payable; and
 - (b) any other period of less than a week for which it is payable;
- “relevant week” means the reduction week or part-week in which the capital in question of which the applicant has deprived himself within the meaning of paragraph 67(1)—
- (a) was first taken into account for the purpose of determining his entitlement to a reduction; or
 - (b) was taken into account on a subsequent occasion for the purpose of determining or re-determining his entitlement to a reduction on that subsequent occasion and that determination or re-determination resulted in his beginning to receive, or ceasing to receive, a reduction,
- and where more than one reduction week is identified by reference to paragraphs (a) and (b) of this definition, the later or latest such reduction week or, as the case may be, the later or latest such part-week is the relevant week;
- “relevant subsequent week” means the reduction week or part-week which includes the day on which the further application or, if more than one further application has been made, the last such application was made.

Capital jointly held.

70. Except where an applicant possesses capital which is disregarded under paragraph 67(7) (notional capital), where an applicant and one or more persons are beneficially entitled in possession to any capital asset they must be treated, in the absence of evidence to the contrary, as if each of them were entitled in possession to the whole beneficial interest therein in an equal share and the foregoing provisions of this Chapter apply for the purposes of calculating the amount of capital which the applicant is treated as possessing as if it were actual capital which the applicant does possess.

Calculation of tariff income from capital: pensioners

71. The capital of an applicant who is a pensioner, calculated in accordance with this Part, is to be treated as if it were a weekly income of—
- (a) £1 for each £500 in excess of £10,000 but not exceeding £16,000; and
 - (b) £1 for any excess which is not a complete £500.

Calculation of tariff income from capital: persons who are not pensioners.

72. The capital of an applicant who is not a pensioner, calculated in accordance with this Part, is to be treated as if it were a weekly income⁽¹⁶⁹⁾ of—
- (a) £1 for each £250 in excess of £6,000 but not exceeding £16,000;
 - (b) £1 for any excess which is not a complete £250.

PART 11 Students

CHAPTER 1 General Interpretation

- 73.—(1) In this Part—

“academic year” means the period of twelve months beginning on 1st January 1st April 1st July or 1st September according to whether the course in question begins in the winter, the spring, the summer, or the autumn respectively but if students are required to begin attending the course during August or September and to continue attending through the autumn, the academic year of the course is to be considered to begin in the autumn rather than the summer;

“access funds” means—

- (a) grants made under section 68 of the Further and Higher Education Act 1992 for the purpose of providing funds on a discretionary basis to be paid to students;
- (b) grants made under sections 73(a) and (c) and 74(1) of the Education (Scotland) Act 1980;
- (c) grants made under Article 30 of the Education and Libraries (Northern Ireland) Order 1993 or grants, loans or other payments made under Article 5 of the Further Education (Northern Ireland) Order 1997 in each case being grants, or grants, loans or other payments as the case may be, for the purpose of assisting students in financial difficulties;

- (d) discretionary payments, known as “learner support funds”, which are made available to students in further education by institutions out of funds provided by the Secretary of State under section 14 of the Education Act 2002 or the Chief Executive of Skills Funding under sections 100 and 101 of the Apprenticeships, Skills, Children and Learning Act 2009; or
- (e) Financial Contingency Funds made available by the Welsh Ministers;

“college of further education” means a college of further education within the meaning of Part 1 of the Further and Higher Education (Scotland) Act 1992;

“contribution” means—

- (a) any contribution in respect of the income of a student or any person which the Secretary of State, the Scottish Ministers or an education authority takes into account in ascertaining the amount of a student’s grant or student loan; or
- (b) any sums, which in determining the amount of a student’s allowance or bursary in Scotland under the Education (Scotland) Act 1980, the Scottish Ministers or education authority takes into account being sums which the Scottish Ministers or education authority considers that it is reasonable for the following persons to contribute towards the holder’s expenses—
 - (i) the holder of the allowance or bursary;
 - (ii) the holder’s parents;
 - (iii) the holder’s parent’s spouse, civil partner or a person ordinarily living with the holder’s parent as if he or she were the spouse or civil partner of that parent; or
 - (iv) the holder’s spouse or civil partner;

“course of study” means any course of study, whether or not it is a sandwich course and whether or not a grant is made for attending or undertaking it;

“covenant income” means the gross income payable to a full-time student under a Deed of Covenant by his parent;

“education authority” means a government department, a local authority as defined in section 579 of the Education Act 1996 (interpretation), a local education authority as defined in section 123 of the Local Government (Scotland) Act 1973, an education and library board established under Article 3 of the Education and Libraries (Northern Ireland) Order 1986, any body which is a research council for the purposes of the Science and Technology Act 1965 or any analogous government department, authority, board or body, of the Channel Islands, Isle of Man or any other country outside Great Britain;

“full-time course of study” means a full-time course of study which—

- (a) is not funded in whole or in part by the Secretary of State under section 14 of the Education Act 2002, the Chief Executive of Skills Funding or by the Welsh Ministers or a full-time course of study which is not funded in whole or in part by the Scottish Ministers at a college of further education or a full-time course of study which is a course of higher education and is funded in whole or in part by the Scottish Ministers;
- (b) is funded in whole or in part by the Secretary of State under section 14 of the Education Act 2002, the Chief Executive of Skills Funding or by the Welsh Ministers if it involves more than 16 guided learning hours per week for the student in question, according to the number of guided learning hours per week for that student set out—
 - (i) in the case of a course funded by the Secretary of State under section 14 of the Education Act 2002 or the Chief Executive of Skills Funding, in the student’s learning agreement signed on behalf of the establishment which is funded by either of those persons for the delivery of that course; or
 - (ii) in the case of a course funded by the Welsh Ministers, in a document signed on behalf of the establishment which is funded by that Council for the delivery of that course; or
- (c) is not higher education and is funded in whole or in part by the Scottish Ministers at a college of further education and involves—
 - (i) more than 16 hours per week of classroom-based or workshop-based programmed learning under the direct guidance of teaching staff according to the number of hours set out in a document signed on behalf of the college; or
 - (ii) 16 hours or less per week of classroom-based or workshop-based programmed learning under the direct guidance of teaching staff and additional hours using structured learning packages supported by the teaching staff where the combined total of hours exceeds 21 hours per week, according to the number of hours set out in a document signed on behalf of the college;

“full-time student” means a person attending or undertaking a full-time course of study and includes a student on a sandwich course;

“grant” (except in the definition of “access funds”) means any kind of educational grant or award and includes any scholarship, studentship, exhibition, allowance, or bursary but does not include a payment from access funds or any payment to which paragraph 16 of Schedule 8 or paragraph 55 of Schedule 10 (allowances and payments for courses of study) applies;

“grant income” means—

- (a) any income by way of a grant;
- (b) any contribution whether or not it is paid;

“higher education” means higher education within the meaning of Part 2 of the Further and Higher Education (Scotland) Act 1992;

“last day of the course” means—

- (a) in the case of a qualifying course, the date on which the last day of that course falls or the date on which the final examination relating to that course is completed, whichever is the later;
- (b) in any other case, the date on which the last day of the final academic term falls in respect of the course in which the student is enrolled;

“period of study” means—

- (a) in the case of a course of study for one year or less, the period beginning with the start of the course and ending with the last day of the course;
- (b) in the case of a course of study for more than one year, in the first or, as the case may be, any subsequent year of the course, other than the final year of the course, the period beginning with the start of the course or, as the case may be, that year’s start and ending with either—
 - (i) the day before the start of the next year of the course in a case where the student’s grant or loan is assessed at a rate appropriate to his studying throughout the year or, if he does not have a grant or loan, where a loan would have been assessed at such a rate had he had one; or
 - (ii) in any other case, the day before the start of the normal summer vacation appropriate to his course;
- (c) in the final year of a course of study of more than one year, the period beginning with that year’s start and ending with the last day of the course;

“periods of experience” means periods of work experience which form part of a sandwich course;

“qualifying course” means a qualifying course as defined for the purposes of Parts 2 and 4 of the Jobseeker’s Allowance Regulations 1996;

“sandwich course” has the meaning prescribed in regulation 2(9) of the Education (Student Support) Regulations 2008, regulation 4(2) of the Education (Student Loans) (Scotland) Regulations 2007 or regulation 2(8) of the Education (Student Support) Regulations (Northern Ireland) 2007, as the case may be;

“standard maintenance grant” means—

- (a) except where paragraph (b) or (c) applies, in the case of a student attending or undertaking a course of study at the University of London or an establishment within the area comprising the City of London and the Metropolitan Police District, the amount specified for the time being in paragraph 2(2)(a) of Schedule 2 to the Education (Mandatory Awards) Regulations 2003 (“the 2003 Regulations”) for such a student;
- (b) except where paragraph (c) applies, in the case of a student residing at his parent’s home, the amount specified in paragraph 3 thereof;
- (c) in the case of a student receiving an allowance or bursary under the Education (Scotland) Act 1980, the amount of money specified as “standard maintenance allowance” for the relevant year appropriate for the student set out in the Student Support in Scotland Guide issued by the Student Awards Agency for Scotland, or its nearest equivalent in the case of a bursary provided by a college of further education or a local education authority;
- (d) in any other case, the amount specified in paragraph 2(2) of Schedule 2 to the 2003 Regulations other than in sub-paragraph (a) or (b) thereof;

“student” means a person, other than a person in receipt of a training allowance, who is attending or undertaking—

- (a) a course of study at an educational establishment; or
- (b) a qualifying course;

“student loan” means a loan towards a student’s maintenance pursuant to any regulations made under section 22 of the Teaching and Higher Education Act 1998, section 73 of the Education (Scotland) Act 1980 or Article 3 of the Education (Student Support) (Northern Ireland) Order 1998 and includes, in Scotland, a young student’s bursary paid under regulation 4(1)(c) of the Students’ Allowances (Scotland) Regulations 2007.

(2) For the purposes of the definition of “full-time student” in sub-paragraph (1), a person must be regarded as attending or, as the case may be, undertaking a full-time course of study or as being on a sandwich course—

- (a) subject to sub-paragraph (3), in the case of a person attending or undertaking a part of a modular course which would be a full-time course of study for the purposes of this Part, for the period beginning on the day on which that part of the course starts and ending—
 - (i) on the last day on which he is registered with the educational establishment as attending or undertaking that part as a full-time course of study; or
 - (ii) on such earlier date (if any) as he finally abandons the course or is dismissed from it;
- (b) in any other case, throughout the period beginning on the date on which he starts attending or undertaking the course and ending on the last day of the course or on such earlier date (if any) as he finally abandons it or is dismissed from it.

(3) For the purposes of paragraph (a) of sub-paragraph (2), the period referred to in that paragraph includes—

- (a) where a person has failed examinations or has failed successfully to complete a module relating to a period when he was attending or undertaking a part of the course as a full-time course of study, any period in respect of which he attends or undertakes the course for the purpose of retaking those examinations or that module;
- (b) any period of vacation within the period specified in that paragraph or immediately following that period except where the person has registered with the educational establishment to attend or undertake the final module in the course and the vacation immediately follows the last day on which he is required to attend or undertake the course.

(4) In sub-paragraph (2), “modular course” means a course of study which consists of two or more modules, the successful completion of a specified number of which is required before a person is considered by the educational establishment to have completed the course.

Treatment of students

74. This scheme has effect in relation to students who are not pensioners subject to the following provisions of this Part.

Students who are excluded from entitlement to a reduction under this scheme.

75.—(1) The students who are excluded from entitlement to a reduction under this scheme are, subject to sub-paragraphs (2) and (7)—

- (a) full-time students, and
- (b) students who are persons treated as not being in Great Britain.

(2) Sub-paragraph (1)(b) does not apply to a student—

- (a) who is a person on income support, an income-based jobseeker’s allowance or an income-related employment and support allowance;
- (b) who is a lone parent;
- (c) whose applicable amount would, but for this paragraph, include the disability premium or severe disability premium;
- (d) whose applicable amount would include the disability premium but for his being treated as capable of work by virtue of a determination made in accordance with regulations made under section 171E of the SSCBA;
- (e) who is, or is treated as, incapable of work and has been so incapable, or has been so treated as incapable, of work in accordance with the provisions of, and regulations made under, Part 12A of the SSCBA (incapacity for work) for a continuous period of not less than 196 days; and

for this purpose, any two or more separate periods separated by a break of not more than 56 days must be treated as one continuous period;

- (f) who has, or is treated as having, limited capability for work and has had, or been treated as having, limited capability for work in accordance with the Employment and Support Allowance Regulations 2008 for a continuous period of not less than 196 days, and for this purpose any two or more separate periods separated by a break of not more than 84 days must be treated as one continuous period;
 - (g) who has a partner who is also a full-time student, if he or that partner is treated as responsible for a child or young person;
 - (h) who is a single applicant with whom a child is placed by a local authority or voluntary organisation within the meaning of the Children Act 1989 or, in Scotland, boarded out within the meaning of the Social Work (Scotland) Act 1968;
 - (i) who is—
 - a. (i) aged under 21 and whose course of study is not a course of higher education,
 - b. (ii) aged 21 and attained that age during a course of study which is not a course of higher education, or
 - c. (iii) a qualifying young person or child within the meaning of section 142 of the SSCBA (child and qualifying young person);
 - (j) in respect of whom—
 - (i) a supplementary requirement has been determined under paragraph 9 of Part 2 of Schedule 2 to the Education (Mandatory Awards) Regulations 2003;
 - (ii) an allowance, or as the case may be, bursary has been granted which includes a sum under paragraph (1)(d) of regulation 4 of the Students' Allowances (Scotland) Regulations 1999 or, as the case may be, under paragraph (1)(d) of regulation 4 of the Education Authority (Bursaries) (Scotland) Regulations 1995, in respect of expenses incurred;
 - (iii) a payment has been made under or by virtue of regulations made under the Teaching and Higher Education Act 1998;
 - (iv) a grant has been made under regulation 13 of the Education (Student Support) Regulations 2005 or under regulation 13 of the Education (Student Support) Regulations (Northern Ireland) 2000; or
 - (v) a supplementary requirement has been determined under paragraph 9 of Schedule 6 to the Students Awards Regulations (Northern Ireland) 1999 or a payment has been made under Article 50(3) of the Education and Libraries (Northern Ireland) Order 1986, on account of his disability by reason of deafness.
- (3) Sub-paragraph (2)(i)(ii) only applies to an applicant until the end of the course during which the applicant attained the age of 21.
- (4) For the purposes of sub-paragraph (2), once sub-paragraph (2)(e) applies to a full-time student, if he then ceases, for a period of 56 days or less, to be incapable, or to be treated as incapable, of work, that sub-paragraph must, on his again becoming so incapable, or so treated as incapable, of work at the end of that period, immediately thereafter apply to him for so long as he remains incapable or is treated as remaining incapable, of work.
- (5) In sub-paragraph (2)(i) the reference to a course of higher education is a reference to a course of any description mentioned in Schedule 6 to the Education Reform Act 1988.
- (6) A full-time student to whom sub-paragraph (2)(i) applies must be treated as satisfying that sub-paragraph from the date on which he made a request for the supplementary requirement, allowance, bursary, or payment as the case may be.
- (7) Sub-paragraph (1)(b) does not apply to a full-time student for the period specified in sub-paragraph (8) if—
 - (a) at any time during an academic year, with the consent of the relevant educational establishment, he ceases to attend or undertake a course because he is—
 - (i) engaged in caring for another person; or
 - (ii) ill;
 - (b) he has subsequently ceased to be engaged in caring for that person or, as the case may be, he has subsequently recovered from that illness; and
 - (c) he is not eligible for a grant or a student loan in respect of the period specified in sub-paragraph (8).

- (8) The period specified for the purposes of sub-paragraph (7) is the period, not exceeding one year, beginning on the day on which he ceased to be engaged in caring for that person or, as the case may be, the day on which he recovered from that illness and ending on the day before—
- (a) the day on which he resumes attending or undertaking the course; or
 - (b) the day from which the relevant educational establishment has agreed that he may resume attending or undertaking the course,
- whichever first occurs.

CHAPTER 2 Income

Calculation of grant income

76.—(1) The amount of a student's grant income to be taken into account in assessing his income must, subject to sub-paragraphs (2) and (3), be the whole of his grant income.

- (2) There must be excluded from a student's grant income any payment—
- (a) intended to meet tuition fees or examination fees;
 - (b) in respect of the student's disability;
 - (c) intended to meet additional expenditure connected with term time residential study away from the student's educational establishment;
 - (d) on account of the student maintaining a home at a place other than that at which he resides during his course;
 - (e) on account of any other person but only if that person is residing outside the United Kingdom and there is no applicable amount in respect of him;
 - (f) intended to meet the cost of books and equipment;
 - (g) intended to meet travel expenses incurred as a result of his attendance on the course;
 - (h) intended for the child care costs of a child dependent;
 - (i) of higher education bursary for care leavers made under Part 3 of the Children Act 1989.
- (3) Where a student does not have a student loan and is not treated as possessing such a loan, there must be excluded from the student's grant income—
- (a) the sum of £303 per academic year in respect of travel costs; and
 - (b) the sum of £390 per academic year towards the costs of books and equipment, whether or not any such costs are incurred.
- (4) There must also be excluded from a student's grant income the grant for dependants known as the parents' learning allowance paid pursuant to regulations made under Article 3 of the Education (Student Support) (Northern Ireland) Order 1998 or section 22 of the Teaching and Higher Education Act 1998.
- (5) Subject to sub-paragraphs (6) and (7), a student's grant income must be apportioned—
- (a) subject to sub-paragraph (8), in a case where it is attributable to the period of study, equally between the weeks in that period beginning with the reduction week, the first day of which coincides with, or immediately follows, the first day of the period of study and ending with the reduction week, the last day of which coincides with, or immediately precedes, the last day of the period of study;
 - (b) in any other case, equally between the weeks in the period beginning with the reduction week, the first day of which coincides with, or immediately follows, the first day of the period for which it is payable and ending with the reduction week, the last day of which coincides with, or immediately precedes, the last day of the period for which it is payable.
- (6) Any grant in respect of dependants paid under section 63(6) of the Health Services and Public Health Act 1968 (grants in respect of the provision of instruction to officers of hospital authorities) and any amount intended for the maintenance of dependants under Part 3 of Schedule 2 to the Education (Mandatory Awards) Regulations 2003 must be apportioned equally over the period of 52 weeks or, if there are 53 reduction weeks (including part-weeks) in the year, 53.
- (7) In a case where a student is in receipt of a student loan or where he could have acquired a student loan by taking reasonable steps but had not done so, any amount intended for the maintenance of dependants to which neither sub-paragraph (6) nor paragraph 80(2) (other amounts to be disregarded) applies, must be apportioned over the same period as the student's loan is apportioned or, as the case may be, would have been apportioned.

- (8) In the case of a student on a sandwich course, any periods of experience within the period of study must be excluded and the student's grant income must be apportioned equally between the weeks in the period beginning with the reduction week, the first day of which immediately follows the last day of the period of experience and ending with the reduction week, the last day of which coincides with, or immediately precedes, the last day of the period of study.

Calculation of covenant income where a contribution is assessed.

- 77.—(1) Where a student is in receipt of income by way of a grant during a period of study and a contribution has been assessed, the amount of his covenant income to be taken into account for that period and any summer vacation immediately following must be the whole amount of the covenant income less, subject to sub-paragraph (3), the amount of the contribution.
- (2) The weekly amount of the student's covenant must be determined—
- (a) by dividing the amount of income which falls to be taken into account under sub-paragraph (1) by 52 or 53, whichever is reasonable in the circumstances; and
 - (b) by disregarding £5 from the resulting amount.
- (3) For the purposes of sub-paragraph (1), the contribution must be treated as increased by the amount (if any) by which the amount excluded under paragraph 76(2)(g) falls short of the amount specified in paragraph 7(2) of Schedule 2 to the Education (Mandatory Awards) Regulations 2003 (travel expenditure).

Covenant income where no grant income or no contribution is assessed.

- 78.—(1) Where a student is not in receipt of income by way of a grant the amount of his covenant income must be calculated as follows—
- (a) any sums intended for any expenditure specified in paragraph 76(2)(a) to (e) necessary as a result of his attendance on the course must be disregarded;
 - (b) any covenant income, up to the amount of the standard maintenance grant, which is not so disregarded, must be apportioned equally between the weeks of the period of study;
 - (c) there must be disregarded from the amount so apportioned the amount which would have been disregarded under paragraph 76(2)(f) and (3) had the student been in receipt of the standard maintenance grant; and
 - (d) the balance, if any, must be divided by 52 or 53 whichever is reasonable in the circumstances and treated as weekly income of which £5 must be disregarded.
- (2) Where a student is in receipt of income by way of a grant and no contribution has been assessed, the amount of his covenanted income must be calculated in accordance with paragraphs (a) to (d) of sub-paragraph (1), except that—
- (a) the value of the standard maintenance grant must be abated by the amount of such grant income less an amount equal to the amount of any sums disregarded under paragraph 76(2)(a) to (e); and
 - (b) the amount to be disregarded under sub-paragraph (1)(c) must be abated by an amount equal to the amount of any sums disregarded under paragraph 76(2)(f) and (g) and (3).

Relationship with amounts to be disregarded under Schedule 8

79. No part of a student's covenant income or grant income is to be disregarded under paragraph 19 of Schedule 8 (disregard of certain charitable and voluntary, etc., payments).

Other amounts to be disregarded.

- 80.—(1) For the purposes of ascertaining income other than grant income, covenant income and loans treated as income in accordance with paragraph 81 (treatment of student loans), any amounts intended for any expenditure specified in paragraph 76(2) (calculation of grant income), necessary as a result of his attendance on the course must be disregarded.
- (2) But sub-paragraph (1) applies only if, and to the extent that, the necessary expenditure exceeds or is likely to exceed the amount of the sums disregarded under paragraph 76(2) or (3), 77(3), 78(1)(a) or (c) or 81(5) (calculation of grant income, covenant income and treatment of student loans) on like expenditure.

Treatment of student loans

- 81.—(1) A student loan is to be treated as income.
- (2) In calculating the weekly amount of the loan to be taken into account as income—
- (a) in respect of a course that is of a single academic year's duration or less, a loan which is payable in respect of that period is to be apportioned equally between the weeks in the period beginning with—
 - (i) except in a case where sub-paragraph (ii) applies, the reduction week, the first day of which coincides with, or immediately follows, the first day of the single academic year;
 - (ii) where the student is required to start attending the course in August or where the course is less than an academic year's duration, the reduction week, the first day of which coincides with, or immediately follows, the first day of the course, and ending with the reduction week, the last day of which coincides with, or immediately precedes, the last day of the course;
 - (b) in respect of an academic year of a course which starts other than on 1st September, a loan which is payable in respect of that academic year is to be apportioned equally between the weeks in the period—
 - (i) beginning with the reduction week, the first day of which coincides with or immediately follows, the first day of that academic year, and
 - (ii) ending with the reduction week, the last day of which coincides with or immediately precedes, the last day of that academic year, but excluding any reduction weeks falling entirely within the quarter during which, in the opinion of the authority, the longest of any vacation is taken and for the purposes of this paragraph, "quarter" has the same meaning as for the purposes of the Education (Student Support) Regulations 2005;
 - (c) in respect of the final academic year of a course (not being a course of a single year's duration), a loan which is payable in respect of that final academic year is to be apportioned equally between the weeks in the period beginning with—
 - (i) except in a case where sub-paragraph (ii) applies, the reduction week, the first day of which coincides with, or immediately follows, the first day of that academic year;
 - (ii) where the final academic year starts on 1st September, the reduction week, the first day of which coincides with, or immediately follows, the earlier of 1st September or the first day of the autumn term, and ending with the reduction week, the last day of which coincides with, or immediately precedes, the last day of the course;
 - (d) in any other case, the loan is to be apportioned equally between the weeks in the period beginning with the earlier of—
 - (i) the first day of the first reduction week in September; or
 - (ii) the reduction week, the first day of which coincides with, or immediately follows the first day of the autumn term, and ending with the reduction week, the last day of which coincides with, or immediately precedes, the last day of June, and, in all cases, from the weekly amount so apportioned £10 is to be disregarded.
- (3) A student is to be treated as possessing a student loan in respect of an academic year where—
- (a) a student loan has been made to him in respect of that year; or
 - (b) he could acquire such a loan in respect of that year by taking reasonable steps to do so.
- (4) Where a student is treated as possessing a student loan under sub-paragraph (3), the amount of the student loan to be taken into account as income must be, subject to sub-paragraph (5)—
- (a) in the case of a student to whom a student loan is made in respect of an academic year, a sum equal to—
 - (i) the maximum student loan he is able to acquire in respect of that year by taking reasonable steps to do so; and
 - (ii) any contribution whether or not it has been paid to him;
 - (b) in the case of a student to whom a student loan is not made in respect of an academic year, the maximum student loan that would be made to the student if—
 - (i) he took all reasonable steps to obtain the maximum student loan he is able to acquire in respect of that year; and
 - (ii) no deduction in that loan was made by virtue of the application of a means test.
- (5) There must be deducted from the amount of income taken into account under sub-paragraph (4)—
- (a) the sum of £303 per academic year in respect of travel costs; and

(b) the sum of £390 per academic year towards the cost of books and equipment, whether or not any such costs are incurred.

- (6) A loan for fees, known as a fee loan or a fee contribution loan, made pursuant to regulations made under Article 3 of the Education (Student Support) (Northern Ireland) Order 1998, section 22 of the Teaching and Higher Education Act 1998 or section 73(f) of the Education (Scotland) Act 1980, shall be disregarded as income.

Treatment of payments from access funds

82.—(1) This paragraph applies to payments from access funds that are not payments to which paragraph 85(2) or (3) (income treated as capital) applies.

- (2) A payment from access funds, other than a payment to which sub-paragraph (3) applies, must be disregarded as income.

(3) Subject to sub-paragraph (4) of this paragraph and paragraph 40 of Schedule 8 (disregards in the calculation of income other than earnings: persons who are not pensioners)—

(a) any payments from access funds which are intended and used for an item of food, ordinary clothing or footwear, household fuel, or rent of a single applicant or, as the case may be, of the applicant or any other member of his family, and

(b) any payments from access funds which are used for any council tax or water charges for which that applicant or member is liable, must be disregarded as income to the extent of £20 per week.

(4) Where a payment from access funds is made—

(a) on or after 1st September or the first day of the course, whichever first occurs, but before receipt of any student loan in respect of that year and that payment is intended for the purpose of bridging the period until receipt of the student loan; or

(b) before the first day of the course to a person in anticipation of that person becoming a student,

that payment must be disregarded as income.

Disregard of contribution

83. Where the applicant or his partner is a student and, for the purposes of assessing a contribution to the student's grant or student loan, the other partner's income has been taken into account, an amount equal to that contribution must be disregarded for the purposes of assessing that other partner's income.

Further disregard of student's income

84. Where any part of a student's income has already been taken into account for the purposes of assessing his entitlement to a grant or student loan, the amount taken into account must be disregarded in assessing that student's income.

Income treated as capital.

85.—(1) Any amount by way of a refund of tax deducted from a student's covenant income must be treated as capital.

(2) An amount paid from access funds as a single lump sum must be treated as capital.

(3) An amount paid from access funds as a single lump sum which is intended and used for an item other than food, ordinary clothing or footwear, household fuel or rent, or which is used for an item other than any council tax or water charges for which that applicant or member is liable, must be disregarded as capital but only for a period of 52 weeks from the date of the payment.

Disregard of changes occurring during summer vacation

86. In calculating a student's income the authority must disregard any change in the standard maintenance grant, occurring in the recognised summer vacation appropriate to the student's course if that vacation does not form part of his period of study from the date on which the change occurred to the end of that vacation.

PART 12 Extended reductions
CHAPTER 1 Extended reductions: pensioners

Extended reductions: pensioners

87. Paragraphs 88 to 93 apply in relation to applicants who are pensioners.

Extended reductions (qualifying contributory benefits): pensioners

- 88.—(1) Except in the case of an applicant who is in receipt of state pension credit, an applicant who is entitled to a reduction under this scheme by virtue of falling within any of classes A to C is entitled to an extended reduction (qualifying contributory benefits) where—
- (a) the applicant or the applicant’s partner was entitled to a qualifying contributory benefit;
 - (b) entitlement to a qualifying contributory benefit ceased because the applicant or the applicant’s partner—
 - (i) commenced employment as an employed or self-employed earner;
 - (ii) increased their earnings from such employment; or
 - (iii) increased the number of hours worked in such employment,and that employment is or, as the case may be, those increased earnings or increased number of hours are expected to last five weeks or more;
 - (c) the applicant or the applicant’s partner had been entitled to and in receipt of a qualifying contributory benefit or a combination of qualifying contributory benefits for a continuous period of at least 26 weeks before the day on which the entitlement to a qualifying contributory benefit ceased; and
 - (d) the applicant or the applicant’s partner was not entitled to and not in receipt of a qualifying income-related benefit in the last reduction week in which the applicant, or the applicant’s partner, was entitled to a qualifying contributory benefit.
- (2) An applicant must be treated as entitled to a reduction under this scheme by virtue of falling within any of classes A to C where—
- (a) the applicant ceased to be entitled to a reduction under this scheme because the applicant vacated the dwelling in which the applicant was resident;
 - (b) the day on which the applicant vacated the dwelling was either in the week in which entitlement to a qualifying contributory benefit ceased, or in the preceding week; and
 - (c) entitlement to the qualifying contributory benefit ceased in any of the circumstances listed in sub-paragraph (1)(b).

Duration of extended reduction period (qualifying contributory benefits): pensioners

- 89.—(1) Where an applicant is entitled to an extended reduction (qualifying contributory benefits), the extended reduction period starts on the first day of the reduction week immediately following the reduction week in which the applicant, or the applicant’s partner, ceased to be entitled to a qualifying contributory benefit.
- (2) For the purpose of sub-paragraph (1), an applicant or an applicant’s partner ceases to be entitled to a qualifying contributory benefit on the day immediately following the last day of entitlement to that benefit.
- (3) The extended reduction period ends—
- (a) at the end of a period of four weeks; or
 - (b) on the date on which the applicant who is receiving the extended reduction (qualifying contributory benefits) has no liability for council tax if that occurs first.

Amount of extended reduction (qualifying contributory benefits): pensioners

- 90.—(1) For any week during the extended reduction period the amount of the extended reduction (qualifying contributory benefits) the applicant is entitled to is the greater of—
- (a) the amount of council tax reduction to which the applicant was entitled by virtue of falling within any of classes A to C in the last reduction week before the applicant or the applicant’s partner ceased to be entitled to a qualifying contributory benefit;
 - (b) the amount of reduction under this scheme to which the applicant would be entitled under by virtue of falling within any of classes A to C for any reduction week during the extended

- reduction period, if paragraph 88 (extended reductions (qualifying contributory benefits): pensioners) did not apply to the applicant; or
- (c) the amount of reduction under this scheme to which the applicant's partner would be entitled by virtue of falling within any of classes A to C if paragraph 88 did not apply to the applicant.

(2) Sub-paragraph (1) does not apply in the case of a mover.

(3) Where an applicant is in receipt of an extended reduction (qualifying contributory benefits) under this paragraph and the applicant's partner makes an application for a reduction under this scheme, the authority must not award a reduction in pursuance of that application during the extended reduction period.

Extended reductions (qualifying contributory benefits)—movers: pensioners

91.—(1) This paragraph applies—

- (a) to a mover; and
- (b) from the Monday following the day of the move.

(2) The amount of the extended reduction (qualifying contributory benefits) awarded from the Monday from which this paragraph applies until the end of the extended reduction period is to be the amount of reduction under this scheme which was payable to the mover for the last reduction week before the mover, or the mover's partner, ceased to be entitled to a qualifying contributory benefit.

(3) Where a mover's liability to pay council tax in respect of the new dwelling is to a second authority, the extended reduction (qualifying contributory benefits) may take the form of a payment from this authority to—

- (a) the second authority; or
- (b) the mover directly.

Relationship between extended reduction (qualifying contributory benefits) and entitlement to a reduction by virtue of classes A to C

92.—(1) Where an applicant's reduction under this scheme would have ended when the applicant ceased to be entitled to a qualifying contributory benefit in the circumstances listed in paragraph 88(1)(b), that reduction does not cease to have effect until the end of the extended reduction period.

(2) Part 13 (when entitlement begins and change of circumstances) does not apply to any extended reduction (qualifying contributory benefits) payable in accordance with paragraph 90(1)(a) or paragraph 91(2) (amount of extended reduction – movers: pensioners).

Continuing reductions where state pension credit claimed: pensioners.

93.—(1) This paragraph applies where—

- (a) the applicant is entitled to a reduction under this scheme;
- (b) sub-paragraph (2) is satisfied; and
- (c) either—
 - (i) the applicant has attained the qualifying age for state pension credit or, if his entitlement to income-based jobseeker's allowance or income-related employment and support allowance continued beyond that age, has attained the age of 65; or
 - (ii) the applicant's partner has actually claimed state pension credit.

(2) This sub-paragraph is only satisfied if the Secretary of State has certified to the authority that the applicant's partner has actually claimed state pension credit or that—

- (a) the applicant's award of—
 - (i) income support has terminated because the applicant has attained the qualifying age for state pension credit; or
 - (ii) income-based jobseeker's allowance or income-related employment and support allowance has terminated because the applicant has attained the qualifying age for state pension credit or the age of 65; and

- (b) the applicant has claimed or is treated as having claimed or is required to make a claim for state pension credit.
- (3) Subject to sub-paragraph (4), in a case to which this paragraph applies, a person continues to be entitled to a reduction under this scheme for the period of 4 weeks beginning on the day following the day the applicant's entitlement to income support or, as the case may be, income-based jobseeker's allowance, income-related employment and support allowance, ceased, if and for so long as the applicant otherwise satisfies the conditions for entitlement to a reduction under this scheme.
- (4) Where a reduction under this scheme is awarded for the period of 4 weeks in accordance with sub-paragraph (3) above, and the last day of that period falls on a day other than the last day of a reduction week, then a reduction under this scheme must continue to be awarded until the end of the reduction week in which the last day of that period falls.
- (5) Throughout the period of 4 weeks specified in sub-paragraph (3) and any further period specified in sub-paragraph (4)—
 - (a) the whole of the income and capital of the applicant is to be disregarded;
 - (b) the maximum council tax reduction amount of the applicant is to be that which was applicable in his case immediately before that period commenced.
- (6) The maximum reduction is to be calculated in accordance with paragraph 29(1) if, since the date it was last calculated—
 - (a) the applicant's council tax liability has increased; or
 - (b) a change in the deduction under paragraph 30 falls to be made.

CHAPTER 2 Extended reductions: persons who are not pensioners.

Extended reductions: persons who are not pensioners.

94. Paragraphs 95 to 104 apply in relation to applicants who are not pensioners.

Extended reductions: persons who are not pensioners.

- 95.—(1) An applicant who is entitled to a reduction under this scheme by virtue of falling within any of classes D to F is entitled to an extended reduction where—
- (a) the applicant or the applicant's partner was entitled to a qualifying income-related benefit;
 - (b) entitlement to a qualifying income-related benefit ceased because the applicant or the applicant's partner—
 - (i) commenced employment as an employed or self-employed earner;
 - (ii) increased their earnings from such employment; or
 - (iii) increased the number of hours worked in such employment, and that employment is or, as the case may be, those increased earnings or increased number of hours are expected to last five weeks or more; and
 - (c) the applicant or the applicant's partner had been entitled to and in receipt of a qualifying income-related benefit, jobseeker's allowance, or a combination of those benefits for a continuous period of at least 26 weeks before the day on which the entitlement to a qualifying income-related benefit ceased.
- (2) For the purpose of sub-paragraph (1)(c), an applicant or an applicant's partner is to be treated as having been entitled to and in receipt of a qualifying income-related benefit or jobseeker's allowance during any period of less than five weeks in respect of which the applicant or the applicant's partner was not entitled to any of those benefits because the applicant or the applicant's partner was engaged in remunerative work as a consequence of their participation in an employment zone programme.
- (3) For the purpose of this paragraph, where an applicant or an applicant's partner is entitled to and in receipt of joint-claim jobseeker's allowance they must be treated as being entitled to and in receipt of jobseeker's allowance.
- (4) An applicant must be treated as entitled to a reduction under this scheme by virtue of falling within any of classes D to F where—

- (a) the applicant ceased to be entitled to a reduction under this scheme because the applicant vacated the dwelling in which the applicant was resident;
- (b) the day on which the applicant vacated the dwelling was either in the week in which entitlement to a qualifying income-related benefit ceased, or in the preceding week; and
- (c) entitlement to the qualifying income-related benefit ceased in any of the circumstances listed in sub-paragraph (1)(b).

(5) This paragraph does not apply where, on the day before an applicant's entitlement to income support ceased, regulation 6(5) of the Income Support (General) Regulations 1987(remunerative work: housing costs) applied to that applicant.

Duration of extended reduction period: persons who are not pensioners.

96.—(1) Where an applicant is entitled to an extended reduction, the extended reduction period starts on the first day of the reduction week immediately following the reduction week in which the applicant, or the applicant's partner, ceased to be entitled to a qualifying income-related benefit.

(2) For the purpose of sub-paragraph (1), an applicant or an applicant's partner ceases to be entitled to a qualifying income-related benefit on the day immediately following the last day of entitlement to that benefit.

(3) The extended reduction period ends—

- (a) at the end of a period of eight weeks; or
- (b) on the date on which the applicant to whom the extended reduction is payable has no liability for council tax if that occurs first.

Amount of extended reduction: persons who are not pensioners.

97.—(1) For any week during the extended reduction period the amount of the extended reduction to which an applicant is entitled is to be the higher of—

- (a) the amount of the reduction under this scheme to which the applicant was entitled by virtue of falling within any of classes D to F in the last reduction week before the applicant or the applicant's partner ceased to be entitled to a qualifying income-related benefit;
- (b) the amount of reduction under this scheme to which the applicant would be entitled by virtue of falling within any of classes D to F for any reduction week during the extended reduction period, if paragraph 95 (extended reductions: persons who are not pensioners) did not apply to the applicant; or
- (c) the amount of reduction under this scheme to which the applicant's partner would be entitled by virtue of falling within any of classes D to F if paragraph 95 did not apply to the applicant.

(2) Sub-paragraph (1) does not apply in the case of a mover.

(3) Where an applicant is in receipt of an extended reduction under this paragraph and the applicant's partner makes an application for a reduction under this scheme, no amount of reduction under this scheme is to be awarded by the authority during the extended reduction period.

Extended reductions—movers: persons who are not pensioners.

98.—(1) This paragraph applies—

- (a) to a mover; and
- (b) from the Monday following the day of the move.

(2) The amount of the extended reduction awarded from the Monday from which this paragraph applies until the end of the extended reduction period is to be the amount of reduction under this scheme to which the mover would have been entitled had they, or their partner, not ceased to be entitled to a qualifying income-related benefit.

(3) Where a mover's liability to pay council tax in respect of the new dwelling is to a second authority, the extended reduction (qualifying contributory benefits) may take the form of a payment from this authority to—

- (a) the second authority; or
- (b) the mover directly.

Relationship between extended reduction and entitlement to a reduction by virtue of classes D to F

- 99.—(1) Where an applicant's entitlement to a reduction under this scheme would have ended when the applicant ceased to be entitled to a qualifying income-related benefit in the circumstances listed in paragraph 95(1)(b), that entitlement does not cease until the end of the extended reduction period.
- (2) Paragraphs 106 and 107 do not apply to any extended reduction payable in accordance with paragraph 95(1)(a) or 98(2) (amount of extended reduction—movers: persons who are not pensioners).

Extended reductions (qualifying contributory benefits): persons who are not pensioners.

- 100.—(1) An applicant who is entitled to a reduction under this scheme by virtue of falling within any of classes D to F is entitled to an extended reduction (qualifying contributory benefits) where—
- (a) the applicant or the applicant's partner was entitled to a qualifying contributory benefit;
 - (b) entitlement to a qualifying contributory benefit ceased because the applicant or the applicant's partner—
 - (i) commenced employment as an employed or self-employed earner;
 - (ii) increased their earnings from such employment; or
 - (iii) increased the number of hours worked in such employment, and that employment is or, as the case may be, those increased earnings or increased number of hours are expected to last five weeks or more;
 - (c) the applicant or the applicant's partner had been entitled to and in receipt of a qualifying contributory benefit or a combination of qualifying contributory benefits for a continuous period of at least 26 weeks before the day on which the entitlement to a qualifying contributory benefit ceased; and
 - (d) the applicant or the applicant's partner was not entitled to and not in receipt of a qualifying income-related benefit in the last reduction week in which the applicant, or the applicant's partner, was entitled to a qualifying contributory benefit.
- (2) An applicant must be treated as entitled to a reduction under this scheme by virtue of falling within any of classes D to F where—
- (a) the applicant ceased to be entitled to a reduction under this scheme because the applicant vacated the dwelling in which the applicant was resident;
 - (b) the day on which the applicant vacated the dwelling was either in the week in which entitlement to a qualifying contributory benefit ceased, or in the preceding week; and
 - (c) entitlement to the qualifying contributory benefit ceased in any of the circumstances listed in sub-paragraph (1)(b).

Duration of extended reduction period (qualifying contributory benefits): persons who are not pensioners.

- 101.—(1) Where an applicant is entitled to an extended reduction (qualifying contributory benefits), the extended reduction period starts on the first day of the reduction week immediately following the reduction week in which the applicant, or the applicant's partner, ceased to be entitled to a qualifying contributory benefit.
- (2) For the purpose of sub-paragraph (1), an applicant or an applicant's partner ceases to be entitled to a qualifying contributory benefit on the day immediately following the last day of entitlement to that benefit.
- (3) The extended reduction period ends—
- (a) at the end of a period of four weeks; or
 - (b) on the date on which the applicant entitled to the extended reduction (qualifying contributory benefits) has no liability for council tax if that occurs first.

Amount of extended reduction (qualifying contributory benefits): persons who are not pensioners.

- 102.—(1) For any week during the extended reduction period the amount of the extended reduction (qualifying contributory benefits) payable to an applicant is to be the greater of—

- (a) the amount of reduction under this scheme to which the applicant was entitled by virtue of falling within any of classes D to F in the last reduction week before the applicant or the applicant's partner ceased to be entitled to a qualifying contributory benefit;
- (b) the amount of reduction under this scheme to which the applicant would be entitled by virtue of falling within any of classes D to F for any reduction week during the extended reduction period, if paragraph 100 (extended reductions (qualifying contributory benefits): persons who are not pensioners) did not apply to the applicant; or
- (c) the amount of reduction under this scheme to which the applicant's partner would be entitled by virtue of falling within any of classes D to F if paragraph 100 did not apply to the applicant.

(2) Sub-paragraph (1) does not apply in the case of a mover.

(3) Where an applicant is in receipt of an extended reduction (qualifying contributory benefits) under this paragraph and the applicant's partner makes an application for a reduction under this scheme, no amount of reduction may be allowed by the appropriate authority during the extended reduction period.

Extended reductions (qualifying contributory benefits)—movers: persons who are not pensioners.

103.—(1) This paragraph applies—

- (a) to a mover; and
- (b) from the Monday following the day of the move.

(2) The amount of the extended reduction (qualifying contributory benefit) payable from the Monday from which this paragraph applies until the end of the extended reduction period is to be the amount of reduction under this scheme which was awarded to the mover for the last reduction week before the mover, or the mover's partner, ceased to be entitled to a qualifying contributory benefit.

(3) Where a mover's liability to pay council tax in respect of the new dwelling is to a second authority, the extended reduction (qualifying contributory benefits) may take the form of a payment from this authority to—

- (a) the second authority; or
- (b) the mover directly.

Relationship between extended reduction (qualifying contributory benefits) and entitlement to reduction by virtue of classes D to F

104.—(1) Where an applicant's reduction under this scheme would have ended when the applicant ceased to be entitled to a qualifying contributory benefit in the circumstances listed in paragraph 100(1)(b), that reduction does not cease until the end of the extended reduction period.

(2) Paragraphs 106 and 107 (dates on which entitlement begins and change of circumstances take effect) do not apply to any extended reduction (qualifying contributory benefits) payable in accordance with paragraph 102(1)(a) or 103(2) (amount of extended reduction—movers: persons who are not pensioners).

CHAPTER 3 Extended reductions: movers in the authority's area

Extended reductions: applicant moving into the authority's area.

105. Where—

- (a) an application is made to the authority ("the current authority") for a reduction under this scheme, and
- (b) the applicant, or the partner of the applicant, is in receipt of an extended reduction from—
 - (i) another billing authority in England; or
 - (ii) a billing authority in Wales,
 the current authority must reduce any reduction to which the applicant is entitled under this scheme by the amount of that extended reduction.

PART 13 When entitlement begins and change of circumstances.

Date on which entitlement begins.

- 106.—(1) Subject to sub-paragraph (2), any person by whom or in respect of whom an application for a reduction under this scheme is made and who is otherwise entitled to that reduction is so entitled from the reduction week following the date on which that application is made or is treated as made.
- (2) Where a person is otherwise entitled to a reduction under this scheme and becomes liable for the first time for the authority's council tax in respect of a dwelling of which he is a resident in the reduction week in which his application is made or is treated as made, he is so entitled from that reduction week.

Date on which change of circumstances is to take effect.

- 107.—(1) Except in cases where paragraph 60 (disregard of changes in tax, contributions, etc.) applies and subject to the following provisions of this paragraph and (in the case of applicants who are pensioners) paragraph 108 (change of circumstance where state pension credit in payment), a change of circumstances which affects entitlement to, or the amount of, a reduction under this scheme ("change of circumstances"), takes effect from the first day of the reduction week following the date on which the change actually occurs.
- (2) Where that change is cessation of entitlement to any benefit under the benefit Acts, the date on which the change actually occurs is the day immediately following the last day of entitlement to that benefit.
- (3) Subject to sub-paragraph (4), where the change of circumstances is a change in the amount of council tax payable, it takes effect from the day on which it actually occurs.
- (4) Where the change of circumstances is a change in the amount a person is liable to pay in respect of council tax in consequence of regulations under section 13 of the 1992 Act (reduced amounts of council tax) or changes in the discount to which a dwelling may be subject under section 11 or 11A of that Act (discounts), it takes effect from the day on which the change in amount has effect.
- (5) Where the change of circumstances is the applicant's acquisition of a partner, the change takes effect on the day on which the acquisition takes place.
- (6) Where the change of circumstances is the death of an applicant's partner or their separation, it takes effect on the day the death or separation occurs.
- (7) If two or more changes of circumstances occurring in the same reduction week would, but for this paragraph, take effect in different reduction weeks in accordance with sub-paragraphs (1) to (6) they take effect from the day to which the appropriate sub-paragraph from (3) to (6) above refers, or where more than one day is concerned, from the earlier day.
- (8) Where the change of circumstances is that income, or an increase in the amount of income, other than a benefit or an increase in the amount of a benefit under the SSCBA, is paid in respect of a past period and there was no entitlement to income of that amount during that period, the change of circumstances takes effect from the first day on which such income, had it been paid in that period at intervals appropriate to that income, would have fallen to be taken into account for the purposes of this scheme.
- (9) Without prejudice to sub-paragraph (8), where the change of circumstances is the payment of income, or arrears of income, in respect of a past period, the change of circumstances takes effect from the first day on which such income, had it been timeously paid in that period at intervals appropriate to that income, would have fallen to be taken into account for the purposes of this scheme.
- (10) Sub-paragraph (11) applies if—
- (a) the applicant or his partner has attained the age of 65; and
 - (b) either—
 - (i) a non-dependent took up residence in the applicant's dwelling; or

(ii) there has been a change of circumstances in respect of a non-dependent so that the amount of the deduction which falls to be made under paragraph 30 increased.

(11) Where this sub-paragraph applies, the change of circumstances referred to in sub-paragraph (10)(b) takes effect from the effective date.

(12) In sub-paragraph (11), but subject to sub-paragraph (13), “the effective date” means—

(a) where more than one change of a kind referred to in sub-paragraph (10)(b) relating to the same non-dependent has occurred since—

(i) the date on which the applicant’s entitlement to a reduction under this scheme first began; or

(ii) the date which was the last effective date in respect of such a change, whichever is the later, the date which falls 26 weeks after the date on which the first such change occurred;

(b) where paragraph (a) does not apply, the date which falls 26 weeks after the date on which the change referred to in sub-paragraph (10)(b) occurred.

(13) If in any particular case the date determined under sub-paragraph (12) is not the first day of a reduction week, the effective date in that case is to be the first day of the next reduction week to commence after the date determined under that sub-paragraph.

Change of circumstances where state pension credit in payment

108.—(1) Sub-paragraphs (2) and (3) apply where—

(a) the applicant is in receipt of state pension credit;

(b) the amount of state pension credit awarded to him is changed in consequence of a change in the applicant’s circumstances or the correction of an official error; and

(c) the change in the amount of state pension credit payable to the applicant results in a change in the amount of a reduction he receives under this scheme.

(2) Where the change of circumstance is that an increase in the amount of state pension credit payable to the applicant results in—

(a) an increase in the reduction he receives under this scheme, the change takes effect from the first day of the reduction week in which state pension credit becomes payable at the increased rate; or

(b) a decrease in the reduction he receives under this scheme, the change takes effect from the first day of the reduction week next following the date on which—

(i) the local authority receives notification from the Secretary of State of the increase in the amount of state pension credit; or

(ii) state pension credit is increased, whichever is the later.

(3) Where the change of circumstance (“the relevant change”) is that the applicant’s state pension credit has been reduced and in consequence the reduction the applicant receives under this scheme reduces—

(a) in a case where the applicant’s state pension credit has been reduced because the applicant failed to notify the Secretary of State timeously of a change of circumstances, the relevant change takes effect from the first day of the reduction week from which state pension credit was reduced; or

(b) in any other case the relevant change takes effect from the first day of the reduction week next following the date on which—

(i) the authority receives notification from the Secretary of State of the reduction in the amount of state pension credit; or

(ii) state pension credit is reduced, whichever is the later.

(4) Where the change of circumstance is that state pension credit is reduced and in consequence of the change, the amount of a reduction he receives under this scheme is increased, the change takes effect from the first day of the reduction week in which state pension credit becomes payable at the reduced rate.

(5) Where a change of circumstance occurs in that an award of state pension credit has been made to the applicant or his partner and this would result in a decrease in the amount of reduction he

receives under this scheme, the change takes effect from the first day of the reduction week next following the date on which—

- (a) the authority receives notification from the Secretary of State of the award of state pension credit; or
 - (b) entitlement to state pension credit begins, whichever is the later.
- (6) Where, in the case of an applicant who, or whose partner, is or has been awarded state pension credit comprising only the savings credit, there is—
- (a) a change of circumstances of a kind described in any of sub-paragraphs (2) to (5) which results from a relevant calculation or estimate; and
 - (b) a change of circumstances which is a relevant determination, each of which results in a change in the amount of reduction the applicant receives under this scheme, the change of circumstances referred to in sub-paragraph (b) takes effect from the day specified in sub-paragraph (2), (3), (4) or (5) as the case may be, in relation to the change referred to in paragraph (a).
- (7) Where a change of circumstance occurs in that a guarantee credit has been awarded to the applicant or his partner and this would result in an increase in the amount of a reduction the applicant receives under this scheme, the change takes effect from the first day of the reduction week next following the date in respect of which the guarantee credit is first payable.
- (8) Where a change of circumstances would, but for this sub-paragraph, take effect under the preceding provisions of this paragraph within the 4 week period specified in paragraph 93 (continuing reductions where state pension credit claimed), that change takes effect on the first day of the first reduction week to commence after the expiry of the 4 week period.
- (9) In this paragraph—
- “official error” means an error made by—
- (a) the authority or a person—
 - (i) authorised to carry out any function of the authority relating to this scheme; or
 - (ii) providing services relating to this scheme directly or indirectly to the authority; or
 - (b) an officer of—
 - (i) the Department for Work and Pensions; or
 - (ii) the Commissioners of Inland Revenue, acting as such,

but excludes any error caused wholly or partly by any person or body not specified in paragraph (a) or (b) of this definition and any error of law which is shown to have been an error only by virtue of a subsequent decision of the court;

“relevant calculation or estimate” means the calculation or estimate made by the Secretary of State of the applicant’s or, as the case may be, the applicant’s partner’s income and capital for the purposes of the award of state pension credit;

“relevant determination” means a change in the determination by the authority of the applicant’s income and capital using the relevant calculation or estimate, in accordance with paragraph 36(1).

PART 14 Applications (including duties to notify authority of change of circumstances)

Making an application

109.—(1) In the case of—

- (a) a couple or (subject to paragraph (b)) members of a polygamous marriage an application is to be made by whichever one of them they agree should so apply or, in default of agreement, by such one of them as the authority determines; or
 - (b) in the case of members of a polygamous marriage to whom paragraph 37 (income and capital: award of universal credit) applies, an application is to be made by whichever one of the parties to the earliest marriage that still subsists they agree should so apply or, in default of agreement, by such one of them as the authority determines.
- (2) Where a person who is liable to pay council tax in respect of a dwelling is unable for the time being to act, and—

- (a) a deputy has been appointed by the Court of Protection with power to claim, or as the case may be, receive benefit on his behalf; or
 - (b) in Scotland, his estate is being administered by a judicial factor or any guardian acting or appointed under the Adults with Incapacity (Scotland) Act 2000 who has power to apply or, as the case may be, receive benefit on his behalf; or
 - (c) an attorney with a general power or a power to apply or, as the case may be, receive benefit, has been appointed by that person under the Powers of Attorney Act 1971, the Enduring Powers of Attorney Act 1985, or the Mental Capacity Act 2005 or otherwise,
- that deputy, judicial factor, guardian, or attorney, as the case may be, may make an application on behalf of that person.

(3) Where a person who is liable to pay council tax in respect of a dwelling is unable for the time being to act and sub-paragraph (2) does not apply to him, the authority may, upon written application made to them by a person who, if a natural person, is over the age of 18, appoint that person to exercise on behalf of the person who is unable to act, any right to which that person might be entitled under this scheme and to receive and deal on his behalf with any sums payable to him.

(4) Where a person who is liable to pay council tax in respect of a dwelling is for the time being unable to act and the Secretary of State has appointed a person to act on his behalf under regulation 33 of the Social Security (Claims and Payments) Regulations 1987 (persons unable to act), the authority may if that person agrees, treat him as if he had been appointed by them under sub-paragraph (3).

(5) Where the authority has made an appointment under sub-paragraph (3) or treated a person as an appointee under sub-paragraph (4)–

- (a) it may at any time revoke the appointment;
- (b) the person appointed may resign his office after having given 4 weeks notice in writing to the authority of his intention to do so;
- (c) any such appointment must terminate when the authority is notified of the appointment of a person mentioned in sub-paragraph (2).

(6) Anything required by this scheme to be done by or to any person who is for the time being unable to act may be done by or to the persons mentioned in sub-paragraph (2) above or by or to the person appointed or treated as appointed under this paragraph and the receipt of any such person so appointed shall be a good discharge to the authority for any sum paid.

(7) The authority must–

- (a) inform any person making an application of the duty imposed by paragraph 115(1)(a);
- (b) explain the possible consequences (including prosecution) of failing to comply with that duty; and
- (c) set out the circumstances a change in which might affect entitlement to the reduction or its amount.

Date on which an application is made.

110.–(1) Subject to sub-paragraph (7), the date on which an application is made is–

- (a) in a case where–
 - (i) an award of state pension credit which comprises a guarantee credit has been made to the applicant or his partner, and
 - (ii) the application is made within one month of the date on which the claim for that state pension credit which comprises a guarantee credit was received at the appropriate DWP office,
 the first day of entitlement to state pension credit which comprises a guarantee credit arising from that claim;
- (b) in a case where–
 - (i) an applicant or his partner is a person in receipt of a guarantee credit,
 - (ii) the applicant becomes liable for the first time to pay council tax in respect of the dwelling which he occupies as his home, and
 - (iii) the application to the authority is received at the designated office within one month of the date of the change,
 the date on which the change takes place;
- (c) in a case where–

- (i) an award of income support, an income-based jobseeker's allowance or an income-related employment and support allowance or an award of universal credit has been made to the applicant or his partner, and
 - (ii) the application is made within one month of the date on which the claim for that income support, jobseeker's allowance, employment and support allowance or universal credit was received,
- the first day of entitlement to income support, an income-based jobseeker's allowance, an income-related employment and support allowance or universal credit arising from that claim;
- (d) in a case where—
 - (i) an applicant or his partner is a person on income support, an income-based jobseeker's allowance or an income-related employment and support allowance or has an award of universal credit,
 - (ii) the applicant becomes liable for the first time to pay council tax in respect of the dwelling which he occupies as his home, and
 - (iii) the application to the authority is received at the designated office within one month of the date of the change,
 the date on which the change takes place;
 - (e) in a case where—
 - (i) the applicant is the former partner of a person who was, at the date of his death or their separation, entitled to a reduction under this scheme, and
 - (ii) where the applicant makes an application for a reduction under this scheme within one month of the date of the death or the separation,
 the date of the death or separation;
 - (f) except where paragraph (a), (b) or (e) is satisfied, in a case where a properly completed application is received within one month (or such longer period as the authority considers reasonable) of the date on which an application form was issued to the applicant following the applicant first notifying, by whatever means, the authority of an intention to make an application, the date of first notification;
 - (g) In any other case, the date on which the application is received at the designated office.
- (2) For the purposes only of sub-paragraph (1)(c) a person who has been awarded an income-based jobseeker's allowance or an income-related employment and support allowance is to be treated as entitled to that allowance for any days which immediately precede the first day in that award and on which he would, but for regulations made under—
- (a) in the case of income-based jobseeker's allowance, paragraph 4 of Schedule 1 to the Jobseekers Act 1995 (waiting days); or
 - (b) in the case of income-related employment and support allowance, paragraph 2 of Schedule 2 to the Welfare Reform Act 2007 (waiting days),
- have been entitled to that allowance.
- (3) Where the defect referred to in paragraph 7 of Schedule 1 to this scheme (application by telephone)—
- (a) is corrected within one month (or such longer period as the authority considers reasonable) of the date the authority last drew attention to it, the authority must treat the application as if it had been duly made in the first instance;
 - (b) is not corrected within one month (or such longer period as the authority considers reasonable) of the date the authority last drew attention to it, the authority must treat the application as if it had been duly made in the first instance where it considers it has sufficient information to decide on the application.
- (4) The authority is to treat a defective application as if it had been validly made in the first instance if, in any particular case, the conditions specified in sub-paragraph (5)(a), (b) or (c) are satisfied.
- (5) The conditions are that—
- (a) where paragraph 4(a) of Schedule 1 (incomplete form) applies, the authority receives at its designated office the properly completed application or the information requested to complete it or the evidence within one month of the request, or such longer period as the authority may consider reasonable; or
 - (b) where paragraph 4(b) of Schedule 1 (application not on approved form or further information requested by authority) applies—
 - (i) the approved form sent to the applicant is received at the designated office properly completed within one month of it having been sent to him; or, as the case may be,

- (ii) the applicant supplies whatever information or evidence was requested under paragraph 4 of that Schedule within one month of the request, or, in either case, within such longer period as the authority may consider reasonable; or
- (c) where the authority has requested further information, the authority receives at its designated office the properly completed application or the information requested to complete it within one month of the request or within such longer period as the authority considers reasonable.

- (6) Except in the case of an application made by a person treated as not being in Great Britain, where a person has not become liable for council tax to the authority but it is anticipated that he will become so liable within the period of 8 weeks (the relevant period), he may apply for a reduction under this scheme at any time in that period in respect of that tax and, provided that liability arises within the relevant period, the authority is to treat the application as having been made on the day on which the liability for the tax arises.
- (7) Except in the case of an application made by a person treated as not being in Great Britain, where the applicant is not entitled to a reduction under this scheme in the reduction week immediately following the date of his application but the authority is of the opinion that unless there is a change of circumstances, he will be entitled to a reduction under this scheme for a period beginning not later than—
- (a) in the case of an application made by—
- (i) a pensioner, or
- (ii) a person who has attained, or whose partner has attained, the age which is 17 weeks younger than the qualifying age for state pension credit, the seventeenth reduction week following the date on which the application is made, or
- (b) in the case of an application made by a person who is not a pensioner, the thirteenth reduction week following the date on which the application is made, the authority may treat the application as made on a date in the reduction week immediately preceding the first reduction week of that period of entitlement and award a reduction accordingly.
- (8) In this paragraph “appropriate DWP office” means an office of the Department for Work and Pensions dealing with state pension credit or an office which is normally open to the public for the receipt of claims for income support, a jobseeker’s allowance or an employment and support allowance.

Applications where an applicant’s Universal Credit ceases an award of Council Tax Reduction

- (9) Where a council tax reduction claim has stopped due to the level of the applicant’s Universal Credit and associated income, that claim will remain valid from the date that Council Tax Reduction has stopped for a period of six calendar months.

Joint claims for Housing Benefit and Council Tax Reduction.

- (10) Where an applicant is entitled to Housing Benefit and notifies the authority of a wish to claim Council Tax Reduction, the authority will assess Council Tax Reduction without the need for a separate claim form
- (11) The effective date of the applicant shall be the date the request is made to the authority (in any format).

Backdating of applications: pensioners

- 111.—(1) Subject to sub-paragraph (2), the time for the making of an application under this scheme by a pensioner is as regards any day on which, apart from satisfying the condition of making an application, the applicant is entitled to such a reduction, that day and the period of three months immediately following it.
- (2) In any case where paragraph 110(1)(a) applies, sub-paragraph (1) does not entitle a person to apply for a reduction under this scheme in respect of any day earlier than three months before the date on which the claim for state pension credit is made (or treated as made by virtue of any provision of the Social Security (Claims and Payments) Regulations 1987).

Backdating of applications: persons who are not pensioners.

- 112.—(1) Where an applicant who is a person who is not a pensioner—
- (a) makes an application under this scheme which includes (or which he subsequently requests should include) a period before the application is made; and
 - (b) from a day in that period, up to the date he made the application (or subsequently requested that the application should include a past period), the applicant had continuous good cause for failing to make an application (or request that the application should include that period), the application is to be treated as made on the date determined in accordance with sub-paragraph (2).
- (2) That date is the latest of—
- (a) the first day from which the applicant had continuous good cause;
 - (b) the day 1 month before the date the application was made;
 - (c) the day 1 month before the date when the applicant requested that the application should include a past period.

Information and evidence

- 113.—(1) Subject to sub-paragraph (3), a person who makes an application for a reduction under this scheme must satisfy sub-paragraph (2) in relation both to himself and to any other person in respect of whom he is making the application.
- (2) This sub-paragraph is satisfied in relation to a person if—
- (a) the application is accompanied by—
 - (i) a statement of the person's national insurance number and information or evidence establishing that that number has been allocated to the person; or
 - (ii) information or evidence enabling the authority to ascertain the national insurance number that has been allocated to the person; or
 - (b) the person has made an application for a national insurance number to be allocated to him and the application for the reduction is accompanied by—
 - (i) evidence of the application for a national insurance number to be so allocated; and
 - (ii) the information or evidence enabling it to be so allocated.
- (3) Sub-paragraph (2) does not apply—
- (a) in the case of a child or young person in respect of whom an application for a reduction is made;
 - (b) to a person who—
 - (i) is a person treated as not being in Great Britain for the purposes of this scheme;
 - (ii) is subject to immigration control within the meaning of section 115(9)(a) of the Immigration and Asylum Act 1999; and
 - (iii) has not previously been allocated a national insurance number.
- (4) Subject to sub-paragraph (5), a person who makes an application, or a person to whom a reduction under this scheme has been awarded, must furnish such certificates, documents, information and evidence in connection with the application or the award, or any question arising out of the application or the award, as may reasonably be required by the authority in order to determine that person's entitlement to, or continuing entitlement to a reduction under this scheme and must do so within one month of the authority requiring him to do so or such longer period as the authority may consider reasonable.
- (5) Nothing in this paragraph requires a person to furnish any certificates, documents, information, or evidence relating to a payment to which sub-paragraph (7) applies.
- (6) Where a request is made under sub-paragraph (4), the authority must—
- (i) inform the applicant or the person to whom a reduction under this scheme has been awarded of his duty under paragraph 115 (duty to notify change of circumstances) to notify the authority of any change of circumstances; and
 - (ii) without prejudice to the extent of the duty owed under paragraph 115, indicate to him either orally or by notice or by reference to some other document available to him on application and without charge, the kind of change of circumstances which is to be notified.
- (7) This sub-paragraph applies to any of the following payments—
- (a) a payment which is—

- (i) disregarded under paragraph 28 of Schedule 8 (sums disregarded in the calculation of income other than earnings: persons who are not pensioners) or paragraph 38 of Schedule 10 (capital disregards: persons who are not pensioners); or
 - (ii) made under or by the Trusts, the Fund, the Eileen Trust, MFET Limited, the Skipton Fund, the Caxton Foundation, the Caxton Foundation” insert “, the London Emergencies Trust, the We Love Manchester Emergency Fund, the Grenfell Tower charitable funds, the Grenfell Tower Residents’ Discretionary Fund, the Windrush Compensation Scheme or the London Bombings Relief Charitable Fund;
 - (aa) a Grenfell Tower support payment
 - (b) a payment which is disregarded under paragraph 16 of Schedule 9 (payments made under certain trusts and certain other payments), other than a payment under the Independent Living Fund (2006);
 - (c) a payment which is disregarded under paragraph 30(9)(b) or (c) (payment made under certain trusts etc.) or paragraph 2(b) or (c) of Schedule 4 (payments made under certain trusts etc.) other than a payment under the Independent Living Fund (2006).
- (8) Where an applicant or a person to whom a reduction under this scheme has been awarded or any partner has attained the qualifying age for state pension credit and is a member of, or a person deriving entitlement to a pension under, a personal pension scheme, he must where the authority so requires furnish the following information—
- (a) the name and address of the pension fund holder;
 - (b) such other information including any reference or policy number as is needed to enable the personal pension scheme to be identified.

Amendment and withdrawal of application

- 114.—(1) A person who has made an application may amend it at any time before a decision has been made on it by a notice in writing delivered or sent to the designated office.
- (2) Where the application was made by telephone in accordance with Part 1 of Schedule 1, the amendment may also be made by telephone.
- (3) Any application amended in accordance with sub-paragraph (1) or (2) is to be treated as if it had been amended in the first instance.
- (4) A person who has made an application may withdraw it by notice to the designated office at any time before a decision has been made on it.
- (5) Where the application was made by telephone in accordance with Part 1 of Schedule 1, the withdrawal may also be made by telephone.
- (6) Any notice of withdrawal given in accordance with sub-paragraph (4) or (5) has effect when it is received.
- (7) Where a person, by telephone, amends or withdraws an application the person must (if required to do so by the authority) confirm the amendment or withdrawal by a notice in writing delivered or sent to the designated office.

Duty to notify changes of circumstances.

- 115.—(1) Subject to sub-paragraphs (3), (6) and (7), the applicant (or any person acting on his behalf) must comply with sub-paragraph (2) if there is a relevant change of circumstances at any time—
- (a) between the making of an application and a decision being made on it, or
 - (b) after the decision is made (where the decision is that the applicant is entitled to a reduction under this scheme) including at any time while the applicant is in receipt of such a reduction.
- (2) The applicant (or any person acting on his behalf) must notify any change of circumstances which the applicant (or that person) might reasonably be expected to know might affect his entitlement to, or the amount of, a reduction under this scheme (a “relevant change of circumstances”) by giving notice to the authority—
- (a) in writing; or
 - (b) by telephone—

- (i) where the authority has published a telephone number for that purpose or for the purposes of Part 1 of Schedule 1 unless the authority determines that in any particular case or class of case notification may not be given by telephone; or
 - (ii) in any case or class of case where the authority determines that notice may be given by telephone; or
 - (c) by any other means which the authority agrees to accept in any particular case, within a period of 21 days beginning with the day on which the change occurs, or as soon as reasonably practicable after the change occurs, whichever is later.
- (3) The duty imposed on a person by sub-paragraph (1) does not extend to notifying—
- (a) changes in the amount of council tax payable to the authority;
 - (b) changes in the age of the applicant or that of any member of his family;
 - (c) in the case of an applicant in receipt of a relevant benefit, changes in circumstances which affect the amount of the benefit but not the amount of the reduction under this scheme to which he is entitled, other than the cessation of that entitlement to the benefit.
- (4) For the purposes of sub-paragraph (3)(c) “relevant benefit” means income support, an income-based jobseeker’s allowance or an income-related employment and support allowance or universal credit.
- (5) Notwithstanding sub-paragraph (3)(b) or (c) an applicant is required by sub-paragraph (1) to notify the authority of any change in the composition of his family arising from the fact that a person who was a member of his family is now no longer such a person because he has ceased to be a child or young person.
- (6) The duty imposed on a person by sub-paragraph (1) includes—
- (a) in the case of a person falling within class C (pensioners: alternative maximum council tax reduction) giving written notice to the authority of changes which occur in the number of adults in the dwelling or in their total gross incomes and, where any such adult ceases to be in receipt of state pension credit, the date when this occurs;
 - (b) in the case of a person falling within class F (persons who are not pensioners: alternative maximum council tax reduction) giving written notice to the authority of changes which occur in the number of adults in the dwelling or in their total gross incomes and, where any such adult ceases to be in receipt of income support, an income-based jobseeker’s allowance or an income-related employment and support allowance, the date when this occurs.
- (7) A person who has been awarded a reduction under this scheme who is also on state pension credit must report—
- (a) changes affecting the residence or income of any non-dependent normally residing with the applicant or with whom the applicant normally resides;
 - (b) any absence from the dwelling which exceeds or is likely to exceed 13 weeks or where the absence is from Great Britain, which exceeds or is likely to exceed 4 weeks.
- (8) In addition to the changes required to be reported under sub-paragraph (7), a person whose state pension credit comprises only the savings credit must also report—
- (a) changes affecting a child living with him which may result in a change in the amount of reduction under this scheme allowed in his case, but not changes in the age of the child;
 - (b) any change in the amount of the applicant’s capital to be taken into account which does or may take the amount of his capital to more than £16,000;
 - (c) any change in the income or capital of—
 - (i) a non-dependent whose income and capital are treated as belonging to the applicant in accordance with paragraph 34 (circumstances in which income of a non-dependent is to be treated as applicant’s); or
 - (ii) a person to whom paragraph 36(2)(e) (partner treated as member of the household under paragraph 8) refers, and whether such a person or, as the case may be, non-dependent stops living or begins or resumes living with the applicant.
- (9) A person who is entitled to a reduction under this scheme and on state pension credit need only report to the authority the changes specified in sub-paragraphs (7) and (8).

PART 15 Decisions by authority

Decision by authority

116. The authority must make a decision on an application for a reduction under this scheme within 14 days of paragraphs 110 and 113 and Part 1 of Schedule 1 being satisfied, or as soon as reasonably practicable thereafter.

Notification of decision

117.—(1) The authority must notify in writing any person affected by a decision made by it under this scheme—

- in the case of a decision on an application, forthwith or as soon as reasonably practicable thereafter;
- in any other case, within 14 days of that decision or as soon as reasonably practicable thereafter.

(2) Where the decision is to award a reduction the notification under sub-paragraph (1) must include a statement—

- informing the person affected of the duty imposed by paragraph 115(1)(b);
- explaining the possible consequences (including prosecution) of failing to comply with that duty; and
- setting out the circumstances a change in which might affect entitlement to the reduction or its amount.

(3) Where the decision is to award a reduction, the notification under sub-paragraph (1) must include a statement as to how that entitlement is to be discharged.

(4) In any case, the notification under sub-paragraph (1) must inform the person affected of the procedure by which an appeal may be made and must refer the person to the provisions in this scheme relating to the procedure for making an appeal.

(5) A person affected to whom the authority sends or delivers a notification of decision may, within one month of the date of the notification of that decision request in writing the authority to provide a written statement setting out the reasons for its decision on any matter set out in the notice.

(6) The written statement referred to in sub-paragraph (5) must be sent to the person requesting it within 14 days or as soon as reasonably practicable thereafter.

(7) For the purposes of this paragraph a person is to be treated as a person affected by a decision of the authority under this scheme where the rights, duties or obligations of that person are affected by that decision and the person falls within sub-paragraph (8).

(8) This sub-paragraph applies to—

- the applicant;
- in the case of a person who is liable to pay council tax in respect of a dwelling and is unable for the time being to act—
 - (i) a deputy appointed by the Court of Protection with power to claim, or as the case may be, receive benefit on his behalf; or
 - (ii) in Scotland, a judicial factor or any guardian acting or appointed under the Adults with Incapacity (Scotland) Act 2000 who has power to apply or, as the case may be, receive benefit on the person's behalf; or
 - (iii) an attorney with a general power or a power to apply or, as the case may be, receive benefit, has been appointed by that person under the Powers of Attorney Act 1971, the Enduring Powers of Attorney Act 1985, or the Mental Capacity Act 2005 or otherwise,
- a person appointed by the authority under paragraph 109(3).

PART 16 Circumstances in which a payment may be made.

Payment where there is joint and several liability.

118.—(1) Where—

- (a) a person is entitled to a reduction under this scheme in respect of his liability for the authority's council tax as it has effect in respect of a financial year;
- (b) the person entitled to the reduction is jointly and severally liable for the council tax; and

(c) the authority determines that discharging his entitlement by reducing the amount of his liability to which regulation 20(2) of the Council Tax (Administration and Enforcement) Regulations 1992 refers would be inappropriate, it may make a payment to him of the amount of reduction to which he is entitled, rounded where necessary to the nearest penny.

(2) Subject to sub-paragraph (3), any payment made under sub-paragraph (1) must be made to the person who is entitled to the reduction.

(3) Where a person other than the person who is entitled to the reduction under this scheme made the application for the reduction and that first person is a person acting pursuant to an appointment under paragraph 109(3) (persons appointed to act for a person unable to act) or is treated as having been so appointed by virtue of paragraph 109(5), the amount of the reduction may be paid to that person.

PART 17

Award or payment of reduction.

Time and manner of granting reduction under this scheme.

119.—(1) Subject to paragraph 122 (payments on death), where a person is entitled to a reduction under this scheme in respect of his liability for the authority's council tax as it has effect in respect of the financial year, the authority must discharge his entitlement—

(a) by reducing, so far as possible, the amount of his liability to which regulation 20(2) of the Council Tax (Administration and Enforcement) Regulations 1992 refers; or

(b) where—

(i) such a reduction is not possible; or

(ii) such a reduction would be insufficient to discharge the entitlement to a reduction under this scheme; or

(iii) the person entitled to the reduction is jointly and severally liable for the council tax and the authority determines that such a reduction would be inappropriate, by making payment to him of the amount of reduction to which he is entitled, rounded where necessary to the nearest penny.

(2) The authority must notify the person entitled to a reduction under this scheme of the amount of that reduction and how his entitlement is to be discharged in pursuance of sub-paragraph (1).

(3) In a case to which sub-paragraph (1)(b) refers—

(a) if the amount of the council tax for which he remains liable in respect of the financial year, after any reduction to which sub-paragraph (1)(a) refers has been made, is insufficient to enable his entitlement to a reduction under this scheme in respect thereof to be discharged, upon the final instalment of that tax becoming due any outstanding reduction—

(i) must be paid to that person if he so requires; or

(ii) in any other case must (as the authority determines) either be repaid or credited against any subsequent liability of the person to make a payment in respect of the authority's council tax as it has effect for any subsequent year;

(b) if that person has ceased to be liable for the authority's council tax and has discharged the liability for that tax, the outstanding balance (if any) of the reduction under this scheme in respect thereof must be paid within 14 days or, if that is not reasonably practicable, as soon as practicable thereafter

(c) in any other case, the reduction under this scheme must be paid within 14 days of the receipt of the application at the offices of the authority or, if that is not reasonably practicable, as soon as practicable thereafter.

(4) For the purposes of this paragraph “instalment” means any instalment of the authority's council tax to which regulation 19 of the Council Tax (Administration and Enforcement) Regulations 1992 refers (council tax payments).

Person to whom reduction is to be paid.

120.—(1) Subject to paragraph 122 (payment on death) and sub-paragraph (2), any payment of the amount of a reduction under paragraph 116(1)(b) must be made to the person who is entitled to the reduction.

- (2) Where a person other than the person who is entitled to the reduction under this scheme made the application for the reduction and that first person is a person acting pursuant to an appointment under paragraph 107(3) (persons appointed to act for a person unable to act) or is treated as having been so appointed by virtue of paragraph 107(5), the amount of the reduction may be paid to that person.

Shortfall in reduction

121. Where, on the revision of a decision allowing a reduction under this scheme to a person, it is determined that the amount allowed was less than the amount to which that person was entitled, the authority must either—
- (a) make good any shortfall in reduction which is due to that person, by reducing so far as possible the next and any subsequent payments he is liable to make in respect of the council tax of the authority as it has effect for the financial year until that shortfall is made good; or
 - (b) where this is not possible or the person concerned so requests, pay the amount of any shortfall in reduction due to that person within 14 days of the revision of the decision being made or if that is not reasonably practicable, as soon as possible afterwards.

Payment on the death of the person entitled.

122. Where the person entitled to any reduction under this scheme has died and it is not possible to award the reduction which is due in the form of a reduction of the council tax for which he was liable, the authority must make payment of the amount of the reduction to his executor or administrator in accordance with regulation 58(4) of the Council Tax (Administration and Enforcement) Regulations 1992.

- (2) Where an Act of Parliament or subordinate legislation repeals and re-enacts, with or without modification, a previous enactment (including a previous regulation) then, unless the contrary intention appears.

Transitional provisions for restrictions on amounts for children and young persons (pensioners)

- 123 (1) This regulation applies where—
- (a) on 31st March 2018, a person is liable to pay council tax at a reduced rate by virtue of a council tax reduction under an authority's scheme established under section 13A(2) of the Local Government Finance Act 1992 ("a section 13A(2) scheme"); and
 - (b) the person is, or the person and the person's partner are between them, responsible for more than two individuals who are either children or young persons and who are members of the same household (each such individual is referred to as a protected individual").
- (2) Where this regulation applies, the amendments made by regulation 7 do not apply to the person entitled to a council tax reduction referred to in paragraph (1) until—
- (a) the person makes a new application for a reduction under an authority's section 13A(2) scheme; or
 - (b) the person or the person's partner (if any) becomes responsible for a new individual, whichever is the first to occur.
- (3) Paragraphs (4) to (8) apply where—
- (a) the amendments made by regulation 7 apply by virtue of paragraph (2)(b);
 - (b) the child tax credit provisions do not apply; and
 - (c) the person has not made a new application for a reduction under an authority's scheme for a reduction under an authority's section 13A(2) scheme.
- (4) Notwithstanding the default provisions, a child amount shall be included in the applicable amount in relation to any protected individual, in relation to any time when the person or the person's partner (if any) is responsible for the individual and the individual is a member of the same household.
- (5) Paragraph (6) applies where—
- (a) the person or the person's partner (if any) is responsible for one or more protected individuals who are members of the same household; and
 - (b) either of them is responsible for one or more new individuals who are members of the same household.

- (6) Where this paragraph applies, any protected individual for whom the person or the person's partner is responsible is to be counted for the purpose of deciding whether, under the default provisions, an additional child amount is to be included in the applicable amount with respect to the new individual or individuals referred to in paragraph (5)(b).
- (7) Paragraph (8) applies where—
- (a) the number of protected individuals for whom either the person or the person's partner (if any) is responsible, and who are members of the same household, is one;
 - (b) the number of new individuals for whom either the person or the person's partner is responsible, and who are members of the same household, is two or more; and
 - (c) a different child amount would apply to different individuals.
- (8) Where this paragraph applies, the child amounts to be included in the applicable amount shall be—
- (a) the child amount in relation to the protected individual; and
 - (b) a child amount in relation to such one of the new individuals as will result in the greatest possible total amount.
- (9) Under paragraph (3), for the purposes of determining whether the child tax credit provisions apply, by virtue of paragraph 6(1B) of Schedule 1 to the 2012 Regulations, where the person or the person's partner is responsible for one or more protected individuals, the total amount that would be included in the applicable amount under the default provisions shall be taken to be the total that would be included under paragraphs (4), (6) and (8).
- (10) For the purposes of this regulation—
- (a) "the 2012 Regulations" means the Council Tax Reduction Schemes (Prescribed Requirements) (England) Regulations 2012;
 - (b) "applicable amount", "child", "partner" and "young person" have the same meanings as in the 2012 Regulations;
 - (c) "child amount" means the amount determined under paragraph 2 of Schedule 2 to the 2012 Regulations;
 - (d) "child tax credit provisions" means the provisions of paragraph 6(1)(b) of Schedule 1 to the 2012 Regulations (as substituted by paragraph 6(1C) of that Schedule);
 - (e) "default provisions" means the provisions of paragraph 6(1)(b) of Schedule 1 to the 2012 Regulations (as substituted by paragraph 6(1C) of that Schedule);
 - (f) "new individual" means a child or young person who is not a protected individual;
 - (g) any reference to an individual being part of the same household means being part of the same household with the person who is entitled to a reduction under an authority's section 13A(2) scheme and the person's partner (if any);
 - (h) a person is to be treated as responsible for a child or young person in the circumstances set out in regulation 7 of the 2012 Regulations

SCHEDULE 1 Procedural matters

Paragraph 11

PART 1 Procedure for an application for a reduction under this scheme

Procedure by which a person may apply for a reduction under this scheme;

1. Paragraphs 2 to 7 apply to an application for a reduction under this scheme.
2. An application may be made—
 - (a) in writing,
 - (b) by means of an electronic communication in accordance with Part 4 of this Schedule, or
 - (c) where the authority has published a telephone number for the purpose of receiving such applications, by telephone.
- 3.—(1) An application which is made in writing must be made to the designated office on a properly completed form.

(2) The form must be provided free of charge by the authority for the purpose.
4. - (1) Where an application made in writing is defective because—
 - (a) it was made on the form supplied for the purpose but that form is not accepted by the authority as being properly completed; or
 - (b) it was made in writing but not on the form supplied for the purpose and the authority does not accept the application as being in a written form which is sufficient in the circumstances of the case having regard to the sufficiency of the written information and evidence, the authority may, in a case to which sub-paragraph (a) applies, request the applicant to complete the defective application or, in the case to which sub-paragraph (b) applies, supply the applicant with the approved form or request further information and evidence.
(2) An application made on a form provided by the authority is properly completed if completed in accordance with the instructions on the form, including any instructions to provide information and evidence in connection with the application.
- 5.—(1) If an application made by electronic communication is defective the authority must provide the person making the application with an opportunity to correct the defect.

(2) An application made by electronic communication is defective if the applicant does not provide all the information the authority requires.
6. In a particular case the authority may determine that an application made by telephone is only valid if the person making the application approves a written statement of his circumstances provided by the authority.
- 7.—(1) If an application made by telephone is defective the authority must provide the person making the application with an opportunity to correct the defect.

(2) An application made by telephone is defective if the applicant does not provide all the information the authority requests during the telephone call.

PART 2 Procedure for making an appeal.

Procedure by which a person may make an appeal against certain decisions of the authority.

8. A person who is aggrieved by a decision of the authority which affects—
 - (a) the person's entitlement to a reduction under this scheme, or
 - (b) the amount of any reduction under this scheme,may serve a written notice on the authority stating the matter by which, and the grounds on which, he is aggrieved.
9. The authority must—
 - (a) consider the matter to which the notice relates;
 - (b) notify the aggrieved person in writing—
 - (i) that the ground is not well founded, giving reasons for that belief; or

(ii) that steps have been taken to deal with the grievance, stating the steps taken.

10. Where, following notification under paragraph 9(b)(i) or (ii), the person is still aggrieved, or if the authority fails to notify the person aggrieved in accordance with paragraph 9(b) within two months of the service of his notice, he may appeal to a valuation tribunal under section 16 of the 1992 Act.

PART 3 Procedure for applying for a discretionary reduction.

Procedure for an application to the authority for a reduction under section 13A(1)(c) of the 1992 Act

- 11.—(1) An application to the authority for a reduction under section 13A(1)(c) of the 1992 Act may be made—
- (a) in writing;
 - (b) by means of an electronic communication in accordance with Part 4 of this Schedule; or
 - (c) where the authority has published a telephone number for the purposes of receiving such applications, by telephone.
- (2) Where—
- (a) the authority has made a determination under section 13A(1)(c) in relation to a class of case in which liability is to be reduced; and
 - (b) a person in that class would otherwise be entitled to a reduction under this scheme,
- that person's application for a reduction under this scheme may also be treated as an application for a reduction under section 13A(1)(c).

PART 4 Electronic communication

Interpretation

12. In this Part—
“information” includes an application, certificate, notice or other evidence;
“official computer system” means a computer system maintained by or on behalf of the authority for the sending, receiving, processing, or storing of any information.
Conditions for the use of electronic communication
- 13.—(1) The authority may use an electronic communication in connection with applications for, and awards of, reductions under this scheme.
- (2) A person other than the authority may use an electronic communication in connection with the matters referred to in sub-paragraph (1) if the conditions specified in sub-paragraphs (3) to (6) are satisfied.
- (3) The first condition is that the person is for the time being permitted to use an electronic communication by an authorisation given by means of a direction of the Chief Executive of the authority.
- (4) The second condition is that the person uses an approved method of—
- (a) authenticating the identity of the sender of the communication;
 - (b) electronic communication;
 - (c) authenticating any application or notice delivered by means of an electronic communication; and
 - (d) subject to sub-paragraph (7), submitting to the authority any information.
- (5) The third condition is that any information sent by means of an electronic communication is in a form supplied for the purposes of this Part of this Schedule.
- (6) The fourth condition is that the person maintains such records in written or electronic form as may be specified in a direction given by the Chief Executive of the authority.
- (7) Where the person uses any method other than the method approved of submitting any information, that information is to be treated as not having been submitted.

(8) In this paragraph “approved” means approved by means of a direction given by the Chief Executive of the authority for the purposes of this Part of this Schedule.

Use of intermediaries

14. The authority may use intermediaries in connection with—
- (a) the delivery of any information by means of an electronic communication; and
 - (b) the authentication or security of anything transmitted by such means,
- and may require other persons to use intermediaries in connection with those matters.

Effect of delivering information by means of electronic communication.

- 15.—(1) Any information which is delivered by means of an electronic communication is to be treated as having been delivered in the manner or form required by any provision of this scheme, on the day the conditions imposed—
- (a) by this Part; and
 - (b) by or under an enactment,
- are satisfied.
- (2) The authority may determine that any information is to be treated as delivered on a different day (whether earlier or later) from the day provided for in sub-paragraph (1).
- (3) Information must not be taken to have been delivered to an official computer system by means of an electronic communication unless it is accepted by the system to which it is delivered.

Proof of identity of sender or recipient of information

16. If it is necessary to prove, for the purpose of any legal proceedings, the identity of—
- (a) the sender of any information delivered by means of an electronic communication to an official computer system; or
 - (b) the recipient of any such information delivered by means of an electronic communication from an official computer system,
- the sender or recipient, as the case may be, is to be presumed to be the person whose name is recorded as such on that official computer system.

Proof of delivery of information

- 17.—(1) If it is necessary to prove, for the purpose of any legal proceedings, that the use of an electronic communication has resulted in the delivery of any information this must be presumed to have been the case where—
- (a) any such information has been delivered to the relevant authority, if the delivery of that information has been recorded on an official computer system; or
 - (b) any such information has been delivered by the relevant authority if the delivery of that information has been recorded on an official computer system.
- (2) If it is necessary to prove, for the purpose of any legal proceedings, that the use of an electronic communication has resulted in the delivery of any such information, this must be presumed not to be the case if that information delivered to the relevant authority has not been recorded on an official computer system.
- (3) If it is necessary to prove, for the purpose of any legal proceedings, when any such information sent by means of an electronic communication has been received, the time and date of receipt must be presumed to be that recorded on an official computer system.

Proof of content of information

18. If it is necessary to prove, for the purpose of any legal proceedings, the content of any information sent by means of an electronic communication, the content must be presumed to be that recorded on an official computer system.

SCHEDULE 2 Applicable amounts:

PART 1 Persons who are pensioners Paragraph 25

The amount specified in column (2) below in respect of each person or couple specified in column (1) is the amount specified for the purposes of paragraph 25(1)(a) is;

(a) on or after 1st April 2021, the amount specified in column (2) of Table 1 below in respect of each person or couple referred to in column (1) of that Table.

(1A) For the purposes of sub-paragraph (1)(b) as it applies apart from sub-paragraph (1C), where the family includes more than two individuals who are either children or young persons and under paragraph 2 of that Schedule a different amount applies to different individuals, the two amounts to be included in the applicable amount shall be those that result in the greatest possible total amount.

(1B) Sub-paragraph (1C) applies where—

(a) (whether or not as part of a tax credit couple as defined in section 3(5A) of the Tax Credits Act 2002) the applicant has an award of child tax credit (whether or not any amount is payable by way of such credit) in respect of a child or young person who is a member of his family; and
(b) the total amount to be included in the applicable amount under sub-paragraph (1)(b) as substituted by sub-paragraph (1C) would be higher than the total amount that would be included under paragraph (1)(b) apart from sub-paragraph (1C).

(1C) Where this paragraph applies, for sub-paragraph (1)(b) substitute—

(b) an amount determined in accordance with paragraph 2 of that Schedule in respect of any child or young person who is a member of his family and in respect of whom the individual element of child tax credit has been included in the determination of the maximum rate of that credit;

Transitional provisions for restrictions on amounts for children and young persons

(1) This regulation applies where—

(a) on 31st March 2018, a person is liable to pay council tax at a reduced rate by virtue of a council tax reduction under an authority's scheme established under section 13A(2) of the Local Government Finance Act 1992 ("a section 13A(2) scheme"); and

(b) the person is, or the person and the person's partner are between them, responsible for more than two individuals who are either children or young persons and who are members of the same household (each such individual is referred to as a "protected individual").

(2) Where this regulation applies, the amendments made by regulation 7 do not apply to the person entitled to a council tax reduction referred to in paragraph (1) until—

(a) the person makes a new application for a reduction under an authority's section 13A(2) scheme; or

(b) the person or the person's partner (if any) becomes responsible for a new individual, whichever is the first to occur.

(3) Paragraphs (4) to (8) apply where—

(a) the amendments made by regulation 7 apply by virtue of paragraph (2)(b);

(b) the child tax credit provisions do not apply; and

(c) the person has not made a new application for a reduction under an authority's scheme for a reduction under an authority's section 13A(2) scheme.

(4) Notwithstanding the default provisions, a child amount shall be included in the applicable amount in relation to any protected individual, in relation to any time when the person or the person's partner (if any) is responsible for the individual and the individual is a member of the same household.

(5) Paragraph (6) applies where—

(a) the person or the person's partner (if any) is responsible for one or more protected individuals who are members of the same household; and

(b) either of them is responsible for one or more new individuals who are members of the same household.

(6) Where this paragraph applies, any protected individual for whom the person or the person's partner is responsible is to be counted for the purpose of deciding whether, under the default provisions, an additional child amount is to be included in the applicable amount with respect to the new individual or individuals referred to in paragraph (5)(b).

(7) Paragraph (8) applies where—

- (a) the number of protected individuals for whom either the person or the person's partner (if any) is responsible, and who are members of the same household, is one;
- (b) the number of new individuals for whom either the person or the person's partner is responsible, and who are members of the same household, is two or more; and
- (c) a different child amount would apply to different individuals.

(8) Where this paragraph applies, the child amounts to be included in the applicable amount shall be—

- (a) the child amount in relation to the protected individual; and
- (b) a child amount in relation to such one of the new individuals as will result in the greatest possible total amount.

(9) Under paragraph (3), for the purposes of determining whether the child tax credit provisions apply, by virtue of paragraph 6(1B) of Schedule 1 to the 2012 Regulations, where the person or the person's partner is responsible for one or more protected individuals, the total amount that would be included in the applicable amount under the default provisions shall be taken to be the total that would be included under paragraphs (4), (6) and (8).

(10) For the purposes of this regulation—

- (a) "the 2012 Regulations" means the Council Tax Reduction Schemes (Prescribed Requirements) (England) Regulations 2012;
- (b) "applicable amount", "child", "partner" and "young person" have the same meanings as in the 2012 Regulations;
- (c) "child amount" means the amount determined under paragraph 2 of Schedule 2 to the 2012 Regulations;
- (d) "child tax credit provisions" means the provisions of paragraph 6(1)(b) of Schedule 1 to the 2012 Regulations (as substituted by paragraph 6(1C) of that Schedule);
- (e) "default provisions" means the provisions of paragraph 6(1)(b) of Schedule 1 to the 2012 Regulations (as substituted by paragraph 6(1C) of that Schedule);
- (f) "new individual" means a child or young person who is not a protected individual;
- (g) any reference to an individual being part of the same household means being part of the same household with the person who is entitled to a reduction under an authority's section 13A(2) scheme and the person's partner (if any);
- (h) a person is to be treated as responsible for a child or young person in the circumstances set out in regulation 7 of the 2012 Regulations.

Table 1

<i>Column (1) Person, couple, or polygamous marriage</i>	<i>Column (2) Amount</i>
(1) Single applicant or lone parent who has attained pensionable age before 1 st April 2021	£235.20
(2) Couple one or both members before 1 st April 2021	£352.00
(3) If the applicant is a member of a polygamous marriage and one or more members of the marriage have attained pensionable age before 1 st April 2021 (a) for the applicant and the other party to the marriage; (b) for each additional spouse who is a member of the same household as the applicant.	(a) 352.00 (b) £116.80
(4) Single applicant or lone parent who has attained pensionable age on or after 1st April 2021	£218.15

(5) Couple where both members have attained pensionable age on or after 1st April 2021	£332.95
(6) If the applicant is a member of a polygamous marriage and all members of the marriage have attained pensionable age on or after 1st April 2021—	
(a) for the applicant and the other party to the marriage;	£332.95
(b) for each additional spouse who is a member of the same household as the applicant	£114.80

2. Child or young person amounts

- (1) The amounts specified in column (2) below in respect of each person specified in column (1) are the amounts, for the relevant period specified in column (1), specified for the purposes of paragraph 25(1)(b).

Column (1)	Column (2)
Child or young Person	Amount
Person in respect of the period— (a) beginning on that person's date of birth and ending on the day preceding the first Monday in September following that person's sixteenth birthday; (b) beginning on the first Monday in September following that person's sixteenth birthday and ending on the day preceding that person's twentieth birthday.	(a) £83.24; (b) £83.24.

- (2) In column (1) of the table “the first Monday in September” means the Monday which first occurs in the month of September in any year.

PART 2 Family premium

3. Family premium

The amount for the purposes of paragraph 6(1)(c) of Schedule 1 in respect of a family of which at least one member is a child or young person—

- (a) is £19.15 in respect of a reduction week which begins in the period beginning with 1st April 2015 and ending with 30th April 2016;
 (b) is nil in respect of a reduction week which begins after 1st May 2016.

Transitional provision

(1) The amendment in regulation Part 2-3 (Family Premium) of this policy (or 2(4)(b) for the purposes of SI2041/2015) does not apply to a person who, on 30th April 2016, is liable to pay council tax at a reduced rate by virtue of a council tax reduction under an authority's scheme established under section 13A (2) of the Act and is—

- (a) a member of a family of which at least one member is a child or young person; or
 (b) a partner in a polygamous marriage, where he or she, or another partner of the polygamous marriage, is responsible for a child or young person who is a member of the same household.

(2) Paragraph (1) does not apply if—

- (a) sub-paragraph (a) or (b) of that paragraph ceases to apply; or
 (b) the person makes a new application for a reduction under an authority's scheme under section 13A (2) of the Act.

(3) For the purposes of this regulation—

- (a) “the Act” means the Local Government Finance Act 1992;
 (b) “child”, “family”, “partner”, “polygamous marriage” and “young person” have the meanings given by regulation 2 of the Council Tax Reduction Schemes (Prescribed

PART 3 - Premiums

4. The premiums specified in Part 4 shall, for the purposes of paragraph 24(1)(d), be applicable to an applicant who satisfies the condition specified in this Part in respect of that premium.

5.—(1) Subject to sub-paragraph (2), for the purposes of this Part of this Schedule, once a premium is applicable to an applicant under this Part, a person shall be treated as being in receipt of any benefit for—

- (a) in the case of a benefit to which the Social Security (Overlapping Benefits) Regulations 1979 applies, any period during which, apart from the provision of those Regulations, he would be in receipt of that benefit; and
- (b) any period spent by a person in undertaking a course of training or instruction provided or approved by the Secretary of State under section 2 of the Employment and Training Act 1973, or by Skills Development Scotland, Scottish Enterprise or Highland and Islands Enterprise under section 2 of the Enterprise and New Towns (Scotland) Act 1990 or for any period during which he is in receipt of a training allowance.

(2) For the purposes of the carer premium under paragraph 9, a person is to be treated as being in receipt of a carer's allowance by virtue of sub-paragraph (1)(a) only if and for so long as the person in respect of whose care the allowance has been claimed remains in receipt of—

- (a) attendance allowance;
- (b) the care component of disability living allowance at the highest or middle rate prescribed in accordance with section 72(3) of the SSCBA;
- (c) the care component of child disability payment at the highest or middle rate in accordance with regulation 11(5) of the DACYP Regulations;
- (d) the daily living component of personal independence payment paid at either rate prescribed in accordance with Part 4 of the Welfare Reform Act 2012;
- (e) the daily living component of adult disability payment at the standard or enhanced rate in accordance with regulation 5 of the DAWAP Regulations; or
- (f) an AFIP.

Severe disability premium

6.—(1) The condition is that the applicant is a severely disabled person.

(2) For the purposes of sub-paragraph (1), an applicant shall be treated as being a severely disabled person if, and only if—

- a. in the case of a single applicant, a lone parent or an applicant who is treated as having no partner in consequence of sub-paragraph (3)—
 - (i) he is in receipt of—
 - (aa) attendance allowance;
 - (bb) the care component of disability living allowance at the highest or middle rate prescribed in accordance with section 72(3) of the SSCBA;
 - (cc) the daily living component of personal independence payment paid at either rate prescribed in accordance with Part 4 of the Welfare Reform Act 2012;
 - (dd) the daily living component of adult disability payment at the standard or enhanced rate in accordance with regulation 5 of the DAWAP Regulations; or
 - (ee) an AFIP; and
 - (ii) subject to sub-paragraph (6), he has no non-dependants aged 18 or over normally residing with him or with whom he is normally residing; and
 - (iii) no person is entitled to, and in receipt of, a carer's allowance under section 70 of the SSCBA or has an award of universal credit which includes the carer element under regulation 29 of the Universal Credit Regulations 2013 in respect of caring for him;
- b. in the case of an applicant who has a partner—
 - (i) the applicant is in receipt of—
 - (aa) attendance allowance;
 - (bb) the care component of disability living allowance at the highest or middle rate prescribed in accordance with section 72(3) of the SSCBA;
 - (cc) the daily living component of personal independence payment paid at either rate prescribed in accordance with Part 4 of the Welfare Reform Act 2012;

(dd) the daily living component of adult disability payment at the standard or enhanced rate in accordance with regulation 5 of the DAWAP Regulations; or
 (ee) an AFIP;
 (ii) his partner is also in receipt of such an allowance or, if he is a member of a polygamous marriage, each other member of that marriage is in receipt of such an allowance; and
 (iii) subject to sub-paragraph (6), the applicant has no non-dependants aged 18 or over normally residing with him or with whom he is normally residing, and either a person is entitled to and in receipt of a carer's allowance or has an award of universal credit that includes the carer element in respect of caring for only one of the couple or, if he is a member of a polygamous marriage, for one or more but not all the members of the marriage, or as the case may be, no person is entitled to and in receipt of such an allowance or has such an award of universal credit in respect of caring for either member of a couple or any of the members of the marriage.

(3) Where an applicant has a partner who does not satisfy the condition in sub-paragraph (2)(b)(ii), and that partner is blind or is treated as blind within the meaning of sub-paragraph (4), that partner shall be treated for the purposes of sub-paragraph (2) as if he were not a partner of the applicant.

(4) For the purposes of sub-paragraph (3), a person is blind if he is registered in a register compiled by a local authority under section 29 of the National Assistance Act 1948 (welfare services) or, in Scotland, has been certified as blind and in consequence he is registered in a register maintained by or on behalf of a council constituted under section 2 of the Local Government (Scotland) Act 1994.

(5) For the purposes of sub-paragraph (4), a person who has ceased to be registered as blind on regaining his eyesight shall nevertheless be treated as blind and as satisfying the additional condition set out in that sub-paragraph for a period of 28 weeks following the date on which he ceased to be so registered.

(6) (6) For the purposes of sub-paragraph (2)(a)(ii) and (2)(b)(iii) no account shall be taken of—
 (a) a person receiving—
 (i) attendance allowance;
 (ii) the care component of disability living allowance at the highest or middle rate prescribed in accordance with section 72(3) of the SSCBA;
 (iii) the daily living component of personal independence payment paid at either rate prescribed in accordance with Part 4 of the Welfare Reform Act 2012;
 (iv) the daily living component of adult disability payment at the standard or enhanced rate in accordance with regulation 5 of the DAWAP Regulations; or
 (v) an AFIP; or
 (b) a person who is blind or is treated as blind within the meaning of sub-paragraphs (4) and (5).

(7) For the purposes of sub-paragraph (2)(b) a person shall be treated—
 (a) as being in receipt of attendance allowance, or the care component of disability living allowance at the highest or middle rate prescribed in accordance with section 72(3) of the SSCBA, if he would, but for his being a patient for a period exceeding 28 days, be so in receipt;
 (b) as being in receipt of the daily living component of personal independence payment paid at the rate prescribed in accordance with Part 4 of the Welfare Reform Act 2012 if he would, but for his being a patient for a period exceeding 28 days, be so in receipt, notwithstanding section 86 of that Act and regulations made there under;
 (c) as being entitled to and in receipt of a carer's allowance or having an award of universal credit which includes the carer element if he would, but for the person for whom he was caring being a patient in hospital for a period exceeding 28 days, be so entitled and in receipt or have such an award of universal credit.

(8) For the purposes of sub-paragraph (2)(a)(iii) and (2)(b)—
 (a) no account shall be taken of an award of carer's allowance to the extent that payment of such an award is back-dated for a period before the date on which the award is first paid; and
 (b) references to a person being in receipt of a carer's allowance or as having an award of universal credit which includes the carer element shall include reference to a person who

would have been in receipt of that allowance or had such an award of universal credit but for the application of a restriction under section 6B or 7 of the Social Security Fraud Act 2001 (loss of benefit).

Enhanced disability premium

7(1) The condition is that—

- (a) the care component of disability living allowance is, or would, but for a suspension of benefit in accordance with regulations under section 113(2) of the SSCBA or but for an abatement as a consequence of hospitalisation, be payable at the highest rate prescribed under section 73(2) of that Act;
- (aa) the care component of child disability payment is payable at the highest rate in accordance with regulation 11(5) of the DACYP Regulations;
- (ab) the daily living component of adult disability payment is payable, or has ceased to be payable by virtue of regulation 28 (effect of admission to hospital on ongoing entitlement to Adult Disability Payment) of the DAWAP Regulations, at the enhanced rate in accordance with regulation 5 of those Regulations or
- (b) (as the case may be) the daily living component of personal independence payment is, or would, but for a suspension of benefit in accordance with regulations under section 86 of the Welfare Reform Act 2012, be payable at the enhanced rate prescribed in accordance with section 78(2) of that Act,

in respect of a child or young person who is a member of the applicant's family.

(2) Where the condition in sub-paragraph (1) ceases to be satisfied because of the death of a child or young person, the condition is that the applicant or partner is entitled to child benefit in respect of that person under section 145A of the SSCBA (entitlement after death of child or qualifying young person).

Disabled child premium

8. The condition is that a child or young person for whom the applicant or a partner of his is responsible and who is a member of the applicant's household—

- (a) is in receipt of disability living allowance, personal independence payment or is no longer in receipt of such allowance or payment because he is a patient, provided that the child or young person continues to be a member of the family;
- (aa) is in receipt of child disability payment; or
- (b) is blind within the meaning of paragraph 6(4) or treated as blind in accordance with paragraph 6(5); or
- (c) is a child or young person in respect of whom section 145A of the SSCBA (entitlement after death of child or qualifying young person) applies for the purposes of entitlement to child benefit but only for the period prescribed under that section, and in respect of whom a disabled child premium was included in the applicant's applicable amount immediately before the death of that child or young person, or ceased to be included in the applicant's applicable amount because of that child or young person's death; or
- (d) is a young person who is in receipt of adult disability payment or who would, but for payment ceasing by virtue of regulation 28 (effect of admission to hospital on ongoing entitlement to Adult Disability Payment) of the DAWAP Regulations be so in receipt, provided that the young person continues to be a member of the family; or
- (e) is a young person who is in receipt of an AFIP.

Carer premium

9.—(1) The condition is that the applicant or his partner is, or both of them are, entitled to a carer's allowance.

(2) Where a carer premium has been awarded but—

- (a) the person in respect of whose care the carer's allowance has been awarded dies; or
- (b) the person in respect of whom the premium was awarded ceases to be entitled, or ceases to be treated as entitled, to a carer's allowance, this paragraph shall be treated as satisfied for a period of eight weeks from the relevant date specified in sub-paragraph (3).

(3) The relevant date for the purposes of sub-paragraph (2) is—

- (a) in a case within sub-paragraph (2)(a), the Sunday following the death of the person in respect of whose care the carer's allowance has been awarded (or beginning with the date of death if the date occurred on a Sunday);

(b) in a case within sub-paragraph (2)(b), the date on which that person who was entitled to a carer's allowance ceases to be entitled to it.

(4) For the purposes of this paragraph, a person shall be treated as being entitled to and in receipt of a carer's allowance for any period not covered by an award but in respect of which a payment is made in lieu of an award.

Persons in receipt of concessionary payments

10. For the purpose of determining whether a premium is applicable to a person under paragraphs 6 to 9 of this Schedule, any concessionary payment made to compensate that person for the non-payment of any benefit mentioned in those paragraphs shall be treated as if it were a payment of that benefit.

Person in receipt of benefit

11. For the purposes of this Part of this Schedule, a person shall be regarded as being in receipt of any benefit if, and only if, it is paid in respect of him and shall be so regarded only for any period in respect of which that benefit is paid.

PART 4 - Amounts of premium specified in Part 3

<i>Provision</i>	<i>Amount</i>
(1) Severe Disability Premium—	(a) £81.50;
(a) where the applicant satisfies the condition in paragraph 6(2)(a);	(b)
(b) where the applicant satisfies the condition in paragraph 6(2)(b)—	(i) £81.50;
(a) in a case where there is someone in receipt of a carer's allowance or who has an award of universal credit which includes the carer element under regulation 29 of the Universal Credit Regulations 2013, or if he or any partner satisfies that condition only by virtue of paragraph 6(7);	(ii) £163.00.
(b) in a case where there is no-one in receipt of such an allowance or such an award of universal credit.	
(2) Enhanced disability premium	(2) £32.20 in respect of each child or young person in respect of whom the conditions specified in paragraph 7 are satisfied.
(3) Disabled Child Premium.	(3) £80.01 in respect of each child or young person in respect of whom the condition specified in paragraph 8 is satisfied
(4) Carer Premium.	(4) £45.60 in respect of each person who satisfies the condition specified in paragraph 9.

Applicable amounts: persons who are not pensioners Paragraph 26

PART 1 Personal allowances

Personal allowances

1. The amounts specified in column (2) below in respect of each person or couple specified in column (1) shall be the amounts specified for the purposes of paragraphs 25(1)(a) and 26(1)(a) and (b)–

Column 1 Person or Couple	Column 2
1. A Single applicant who; a) is entitled to main phase employment and support allowance	£90.50
b) is aged not less than 25	£90.50
c) is aged not less than 18 but less than 25	£71.70
2. Lone Parent	£90.50
3. Couple; a) Where the applicant is entitled to the main phase of employment and support allowance	£142.25
b) Where one member is aged not less than 18	£142.25
c) For each additional spouse who is a member of the same household as the claimant	£51.75

2. For the purposes of paragraph 1 of this Schedule an applicant is entitled to main phase employment and support allowance if–
(a) paragraph 18 of this Schedule is satisfied in relation to the applicant; or
(b) the applicant is entitled to a converted employment and support allowance.

- 3.–(1) The amounts specified in column (2) below in respect of each person specified in column (1) shall, for the relevant period specified in column (1), be the amounts specified for the purposes of paragraphs 25(1)(b) and 26(1)(c) of this scheme:

Column (1)	Column (2)
Child or Young person	Amount
Person in respect of the period– (a) beginning on that person's date of birth and ending on the day preceding the first Monday in September following that person's sixteenth birthday; (b) beginning on the first Monday in September following that person's sixteenth birthday and ending on the day preceding that person's twentieth birthday.	£83.24 £83.24

- (2) In column (1) of the table in sub-paragraph (1), “the first Monday in September” means the Monday which first occurs in the month of September in any year.

PART 2 - Family premium

4. Family premium

The amount for the purposes of paragraph 6(1)(c) of Schedule 1 in respect of a family of which at least one member is a child or young person is £19.15.

PART 3 - Premiums

5. Except as provided in paragraph 6 of this Schedule, the premiums specified in Part 4 of this Schedule shall, for the purposes of paragraphs 25(1)(d) and 26(1)(e) of this scheme, be applicable to an applicant who satisfies the condition specified in paragraphs 9 to 14 of this Schedule in respect of that premium.

6. Subject to paragraph 7 of this Schedule, where an applicant satisfies the conditions in respect of more than one premium in this Part of this Schedule, only one premium shall be applicable to him and, if they are different amounts, the higher or highest amount shall apply.

7. The following premiums, namely—

- (a) a severe disability premium to which paragraph 11 of this Schedule applies;
- (b) an enhanced disability premium to which paragraph 12 of this Schedule applies;
- (c) a disabled child premium to which paragraph 13 of this Schedule applies; and
- (d) a carer premium to which paragraph 14 of this Schedule applies, may be applicable in addition to any other premium which may apply under this Schedule.

8.—(1) Subject to sub-paragraph (2), for the purposes of this Part of this Schedule, once a premium is applicable to an applicant under this Part, a person shall be treated as being in receipt of any benefit for—

- (a) in the case of a benefit to which the Social Security (Overlapping Benefits) Regulations 1979 applies, any period during which, apart from the provisions of those Regulations, he would be in receipt of that benefit; and
- (b) any period spent by a person in undertaking a course of training or instruction provided or approved by the Secretary of State under section 2 of the Employment and Training Act 1973 or by Skills Development Scotland, Scottish Enterprise or Highlands and Islands Enterprise under section 2 of the Enterprise and New Towns (Scotland) Act 1990 for any period during which he is in receipt of a training allowance.

(2) For the purposes of the carer premium under paragraph 14 of this Schedule, a person shall be treated as being in receipt of carer's allowance by virtue of sub-paragraph (1)(a) only if and for so long as the person in respect of whose care the allowance has been claimed remains in receipt of attendance allowance, or the care component of disability living allowance at the highest or middle rate prescribed in accordance with section 72(3) of the SSCBA or the daily living component of personal independence payment payable under Part 4 of the Welfare Reform Act 2012.

Disability premium

9. The condition is that—

- (a) where the applicant is a single applicant or a lone parent, he has not attained the qualifying age for state pension credit and the additional condition specified in paragraph 10 of this Schedule is satisfied; or
- (b) where the applicant has a partner, either—
 - (i) the applicant has not attained the qualifying age for state pension credit and the additional condition specified in paragraph 10(1)(a) or (b) is satisfied by him; or
 - (ii) his partner has not attained the qualifying age for state pension credit and the additional condition specified in paragraph 10(1)(a) is satisfied by his partner.

Additional condition for the disability premium

10.—(1) Subject to sub-paragraph (2) and paragraph 8 of this Schedule, the additional condition referred to in paragraph 9 of this Schedule is that either—

- (a) the applicant or, as the case may be, his partner—
 - (i) is in receipt of one or more of the following benefits: attendance allowance, disability living allowance, personal independence payment, the disability element or the severe disability element of working tax credit as specified in regulation 20(1)(b) and (f) of the Working Tax Credit (Entitlement and Maximum Rate) Regulations 2002, mobility supplement, long-term incapacity benefit under Part 2 of the SSCBA or severe disablement allowance under Part 3 of that Act but, in the case of long-term incapacity benefit or severe disablement allowance, only where it is paid in respect of him; or
 - (ii) was in receipt of long-term incapacity benefit under Part 2 of the SSCBA when entitlement to that benefit ceased on account of the payment of a retirement

pension under that Act and the applicant has since remained continuously entitled to council tax benefit and, if the long-term incapacity benefit was payable to his partner, the partner is still a member of the family; or

(iii) was in receipt of attendance allowance or disability living allowance but payment of benefit has been suspended in accordance with regulations made under section 113(2) of the SSCBA or otherwise abated as a consequence of the applicant or his partner becoming a patient within the meaning of paragraph 57(11)(i) (treatment of child care charges); or

(iv) was in receipt of personal independence payment, but payment of that benefit has been suspended in accordance with section 86 of the Welfare Reform Act 2012 as a consequence of the applicant becoming a patient within the meaning of paragraph 57(11)(i) (treatment of child care charges); or

(v) is provided by the Secretary of State with an invalid carriage or other vehicle under section 5(2) of the National Health Service Act 1977 (other services) or, in Scotland, under section 46 of the National Health Service (Scotland) Act 1978 (provision of services by Scottish Ministers) or receives payments by way of grant from the Secretary of State under paragraph 2 of Schedule 2 to the Act of 1977 (additional provisions as to vehicles) or, in Scotland, by Scottish Ministers under section 46 of the Act of 1978; or

(vi) is blind and in consequence registered in a register compiled by a local authority under section 29 of the National Assistance Act 1948 (welfare services) or, in Scotland, has been certified as blind and in consequence he is registered in a register maintained by or on behalf of a council constituted under section 2 of the Local Government (Scotland) Act 1994; or

(b) the applicant—

(i) is, or is treated as, incapable of work in accordance with the provisions of, and regulations made under, Part 12A of the SSCBA (incapacity for work); and

(ii) has been incapable, or has been treated as incapable, of work for a continuous period of not less than—

(aa) in the case of an applicant who is terminally ill within the meaning of section 30B(4) of the SSCBA, 196 days;

(bb) in any other case, 364 days.

(2) For the purposes of sub-paragraph (1)(a)(vi), a person who has ceased to be registered as blind on regaining his eyesight shall nevertheless be treated as blind and as satisfying the additional condition set out in that sub-paragraph for a period of 28 weeks following the date on which he ceased to be so registered.

(3) For the purposes of sub-paragraph (1)(b), once the disability premium is applicable to an applicant by virtue of his satisfying the additional condition specified in that provision, if he then ceases, for a period of 8 weeks or less, to be treated as incapable of work or to be incapable of work he shall, on again becoming so incapable of work, immediately thereafter be treated as satisfying the condition in sub-paragraph (1)(b).

(4) For the purposes of sub-paragraph (1)(b), once the disability premium is applicable to an applicant by virtue

of his satisfying the additional condition specified in that provision, he shall continue to be treated as satisfying that condition for any period spent by him in undertaking a course of training provided under section 2 of the Employment and Training Act 1973 or section 2 of the Enterprise and New Towns (Scotland) Act 1990 or for any period during which he is in receipt of a training allowance.

(5) For the purposes of sub-paragraph (1)(b), where any two or more periods of incapacity are separated by a break of not more than 56 days, those periods shall be treated as one continuous period.

(6) For the purposes of this paragraph, a reference to a person who is or was in receipt of long term incapacity benefit includes a person who is or was in receipt of short-term incapacity benefit at a rate equal to the long-term rate by virtue of section 30B(4)(a) of the Act (short-term incapacity benefit for a person who is terminally ill), or who would be or would have been in receipt of short term incapacity benefit at such a rate but for the fact that the rate of short-term incapacity benefit already payable to him is or was equal to or greater than the long-term rate.

(7) In the case of an applicant who is a welfare to work beneficiary (a person to whom regulation 13A(1) of the Social Security (Incapacity for Work) (General) Regulations 1995 applies, and who again becomes incapable of work for the purposes of Part 12A of the SSCBA)—

- (a) the reference to a period of 8 weeks in sub-paragraph (3); and
 - (b) the reference to a period of 56 days in sub-paragraph (5),
- shall in each case be treated as a reference to a period of 104 weeks.

(8) The applicant is not entitled to the disability premium if he has, or is treated as having, limited capability for work.

Severe disability premium

11.—(1) The condition is that the applicant is a severely disabled person.

(2) For the purposes of sub-paragraph (1), an applicant shall be treated as being a severely disabled person if, and only if—

(a) in the case of a single applicant, a lone parent or an applicant who is treated as having no partner in consequence of sub-paragraph (3)—

(i) he is in receipt of attendance allowance, or the care component of disability living allowance at the highest or middle rate prescribed in accordance with section 72(3) of the SSCBA or the daily living component of personal independence payment payable at either rate under Part 4 of the Welfare Reform Act 2012; and

(ii) subject to sub-paragraph (4), he has no non-dependants aged 18 or over normally residing with him or with whom he is normally residing; and

(iii) no person is entitled to, and in receipt of, a carer's allowance under section 70 of the SSCBA or has an award of universal credit which includes the carer element under regulation 29 of the Universal Credit Regulations 2013 in respect of caring for him ;

(b) in the case of an applicant who has a partner—

(i) the applicant is in receipt of attendance allowance, or the care component of disability living allowance at the highest or middle rate prescribed in accordance with section 72(3) of the SSCBA or the daily living component of personal independence payment payable at either rate under Part 4 of the Welfare Reform Act 2012; and

(ii) his partner is also in receipt of such an allowance or, if he is a member of a polygamous marriage, all the partners of that marriage are in receipt of such an allowance; and

(iii) subject to sub-paragraph (4), the applicant has no non-dependants aged 18 or over normally residing with him or with whom he is normally residing, and either a person is entitled to and in receipt of a carer's allowance or has an award of universal credit which includes the carer element in respect of caring for only one of a couple or, in the case of a polygamous marriage, for one or more but not all the partners of the marriage, or as the case may be, no person is entitled to and in receipt of such an allowance or has such an award of universal credit in respect of caring for either member of a couple or any partner of a polygamous marriage.

(3) Where an applicant has a partner who does not satisfy the condition in sub-paragraph (2)(b)(ii), and that partner is blind or is treated as blind within the meaning of paragraph 10(1)(a)(v) and (2), that partner shall be treated for the purposes of sub-paragraph (2)(b)(ii) as if he were not a partner of the applicant.

(4) For the purposes of sub-paragraph (2)(a)(ii) and (2)(b)(iii) no account shall be taken of—

(a) a person receiving attendance allowance, or disability living allowance by virtue of the care component at the highest or middle rate prescribed in accordance with section 72(3) of the SSCBA; or

(b) a person who is blind or is treated as blind within the meaning of paragraph 10(1)(a)(v) and (2).

(5) For the purposes of sub-paragraph (2)(b) a person shall be treated—

(a) as being in receipt of attendance allowance, or the care component of disability living allowance at the highest or middle rate prescribed in accordance with section 72(3) of the SSCBA or the daily living component of personal independence payment payable at either rate under Part 4 of the Welfare Reform Act 2012, if he would, but for his being a patient for a period exceeding 28 days, be so in receipt;

(b) as being entitled to and in receipt of a carer's allowance if he would, but for the person for whom he was caring being a patient in hospital for a period exceeding 28 days, be so entitled and in receipt.

(6) For the purposes of sub-paragraph (2)(a)(iii) and (2)(b), no account shall be taken of an award of carer's allowance to the extent that payment of such an award is back-dated for a period before the date on which the award is first paid.

(7) In sub-paragraph (2)(a)(iii) and (b), references to a person being in receipt of a carer's allowance or an award of universal credit which include the carer element shall include references to a person who would have been in receipt of that allowance but for the application of a restriction under section 6B or 7 of the Social Security Fraud Act 2001 (loss of benefit provisions)

Enhanced disability premium

12.—(1) Subject to sub-paragraph (2), the condition is that—

(a) the Secretary of State has decided that the applicant has, or is to be treated as having, limited capability for work-related activity; or

(b) the care component of disability living allowance is, or would be payable at the highest rate prescribed under section 72(3) of the SSCBA, but for a suspension of benefit in accordance with regulations made under section 113(2) of the SSCBA or but for an abatement as a consequence of hospitalisation be payable at the highest rate prescribed under section 72(3) of the SSCBA in respect of—

(i) the applicant; or

(ii) a member of the applicant's family, who has not attained the qualifying age for state pension credit; or

(c) the daily living component of personal independence payment is, or would be payable at either rate under Part 4 of the Welfare Reform Act 2012, but for a suspension of benefit in accordance with section 86 of the Welfare Reform Act 2012 in respect of—

(i) the applicant; or

(ii) a member of the applicant's family, who has not attained the qualifying age for state pension credit.

(2) Where the condition in sub-paragraph (1) ceases to be satisfied because of the death of a child or young person, the condition is that the applicant or partner is entitled to child benefit in respect of that person under section 145A of the SSCBA (entitlement after death of child or qualifying young person).

(3) The condition is not satisfied if the person to whom sub-paragraph (1) refers is—

(a) an applicant who—

(i) is not a member of a couple or a polygamous marriage; and

(ii) is a patient within the meaning of paragraph 57(11)(e) of this scheme (treatment of child care charges) and has been for a period of more than 52 weeks; or

(b) a member of a couple or a polygamous marriage where each member is a patient within the meaning of paragraph 57(11)(e) and has been for a period of more than 52 weeks.

Disabled child premium

13. The condition is that a child or young person for whom the applicant or a partner of his is responsible and who is a member of the applicant's household—

(a) is in receipt of disability living allowance or personal independence payment or is no longer in receipt of such allowance because he is a patient, provided that the child or young person continues to be a member of the family; or

(b) is blind or treated as blind within the meaning of paragraph 10 of this Schedule; or

(c) is a child or young person in respect of whom section 145A of the SSCBA (entitlement after death of child or qualifying young person) applies for the purposes of entitlement to child benefit but only for the period prescribed under that section, and in respect of whom a disabled child premium was included in the applicant's applicable amount immediately before the death of that child or young person, or ceased to be included in the applicant's applicable amount because of that child or young person's death.

Carer premium

14.—(1) The condition is that the applicant or his partner is, or both of them are, entitled to a carer's allowance under section 70 of the SSCBA.

(2) Where a carer premium is awarded but—

(a) the person in respect of whose care the carer's allowance has been awarded dies; or

(b) in any other case the person in respect of whom a carer premium has been awarded ceases to be entitled to a carer's allowance, the condition for the award of the premium shall be treated as satisfied for a period of eight weeks from the relevant date specified in sub-paragraph (3).

(3) The relevant date for the purposes of sub-paragraph (2) shall be—

(a) where sub-paragraph (2)(a) applies, the Sunday following the death of the person in respect of whose care a carer's allowance has been awarded or the date of death if the death occurred on a Sunday;

(b) in any other case, the date on which the person who has been entitled to a carer's allowance ceases to be entitled to that allowance.

(4) Where a person who has been entitled to a carer's allowance ceases to be entitled to that allowance and makes an application for a reduction, the condition for the award of the carer premium shall be treated as satisfied for a period of eight weeks from the date on which—

(a) the person in respect of whose care the carer's allowance has been awarded dies;

(b) in any other case, the person who has been entitled to a carer's allowance ceased to be entitled to that allowance.

Persons in receipt of concessionary payments

15. For the purpose of determining whether a premium is applicable to a person under paragraphs 10 to 14 of this Schedule, any concessionary payment made to compensate that person for the non-payment of any benefit mentioned in those paragraphs shall be treated as if it were a payment of that benefit.

Persons in receipt of benefit for another

16. For the purposes of this Part of this Schedule, a person shall be regarded as being in receipt of any benefit if, and only if, it is paid in respect of him and shall be so regarded only for any period in respect of which that benefit is paid.

PART 4

Amounts of Premiums Specified in Part 3

Premium	Amount
Disability Premium	£42.50
a. where the applicant satisfies the condition in paragraph 12(a) of Schedule 3 Housing Benefit Regulations 2006	
b. where the applicant satisfies the condition in paragraph 12(b) of Schedule 3 Housing Benefit Regulations 2006	£60.60
Severe Disability Premium	£81.50
a. where the applicant satisfies the condition in paragraph 14(2)(a) of Schedule 3 Housing Benefit Regulations 2006	
b. where the applicant satisfies the condition in paragraph 14(2)(b) of Schedule 3 Housing Benefit Regulations 2006	£81.50
i. in a case where there is someone in receipt of carer's allowance or if he or any partner satisfies that condition only by virtue of paragraph 14(5);	
ii. in a case where there is no one in receipt of such an allowance	£163.00
Disabled Child Premium	£80.01 in respect of each child or young person in respect of whom the condition specified in paragraph 16 of Part 3 of Schedule 3 Housing Benefit Regulations 2006

Premium	Amount
Carer Premium	£45.60 in respect of each person who satisfies the condition specified in paragraph 17 of Part 3 of Schedule 3 Housing Benefit Regulations 2006
Enhanced Disability Premium	(a) £32.20 in respect of each child or young person in respect of whom the conditions specified in paragraph 15 of Part 3 of Schedule 3 Housing Benefit Regulations 2006 are satisfied; (b) £20.85 in respect of each person who is neither- (i) a child or young person; nor (ii) a member of a couple or a polygamous marriage, in respect of whom the conditions specified in paragraph 15 are satisfied; (c) £29.75 where the applicant is a member of a couple or a polygamous marriage and the conditions specified in paragraph 15 of Part 3 of Schedule 3 Housing Benefit Regulations 2006 are satisfied in respect of a member of that couple or polygamous marriage.

PART 5 - The components

18. Subject to paragraph 20 of this Schedule the applicant is entitled to one, but not both, of the components in paragraph 21 or 22 of this Schedule if—

- (a) the applicant or the applicant’s partner has made a claim for employment and support allowance;
- (b) the Secretary of State has decided that the applicant or the applicant’s partner has, or is to be treated as having, limited capability for work or limited capability for work-related activity; and
- (c) either—
 - (i) the assessment phase as defined in section 24(2) of the Welfare Reform Act has ended; or
 - (ii) regulation 7 of the Employment and Support Allowance Regulations 2008 (circumstances where the condition that the assessment phase has ended before entitlement to the support component or the work related activity component arises does not apply) applies.

19. Subject to paragraph 20, the applicant is entitled to one, but not both, of the components in paragraphs 21 and 22 if the applicant or his partner is entitled to a converted employment and support allowance.

20.—(1) The applicant has no entitlement under paragraph 21 or 22 if the applicant is entitled to the disability premium under paragraphs 9 and 10 of this Schedule.

(2) Where the applicant and the applicant’s partner each satisfies paragraph 21 or 22, the component to be included in the applicant’s applicable amount is that which relates to the applicant.

The work-related activity component

21. The applicant is entitled to the work-related activity component if the Secretary of State has decided that the applicant or the applicant's partner has, or is to be treated as having, limited capability for work.

The support component

22. The applicant is entitled to the support component if the Secretary of State has decided that the applicant or the applicant's partner has, or is to be treated as having, limited capability for work-related activity.

PART 6 - Amount of Components

23. The amount of the work-related activity component is £35.95.

24. The amount of the support component is. £47.70

PART 7 - Transitional Addition

25.—(1) The applicant is entitled to the transitional addition calculated in accordance with paragraph 28 where the applicant or the applicant's partner ("the relevant person")—

- (a) is entitled to a converted employment and support allowance; or
- (b) is appealing a conversion decision as described in regulation 5(2)(b) of the Employment and Support Allowance (Transitional Provisions, Housing Benefit and Council Tax Benefit) (Existing Awards) (No. 2) Regulations 2008 and—
 - (i) is treated as having limited capability for work by virtue of regulation 30 of the Employment and Support Allowance Regulations 2008 as modified by the Employment and Support Allowance (Transitional Provisions, Housing Benefit and Council Tax Benefit) (Existing Awards) (No. 2) Regulations 2008; and
 - (ii) is not in receipt of an income-related employment and support allowance, unless the amount of the transitional addition calculated in accordance with paragraph 28 of this Schedule would be nil.

(2) The applicant's entitlement to a transitional addition by virtue of this paragraph ends on any of the following—

- (a) the reduction of the transitional addition to nil in accordance with paragraph 29 of this Schedule;
- (b) the termination of the applicant's award of reduction under this scheme;
- (c) the relevant person ceasing to meet the requirements of sub-paragraph (1)(a) or (b), as the case may be;
- (d) the applicant or the applicant's partner becoming entitled to an income-related employment and support allowance, an income-based jobseeker's allowance, or income support;
- (e) 5th April 2020.

26.—(1) This paragraph applies where—

- (a) the applicant's entitlement to a transitional addition ends, by virtue of the termination of the applicant's award of reduction, under—
 - (i) paragraph 25(2)(b) of this Schedule;
 - (ii) sub-paragraph (3)(b) of this paragraph; or
 - (iii) paragraph 27(3)(b) of this Schedule;
- (b) within 104 weeks of that termination but before 5th April 2020 the applicant again becomes entitled to a reduction under this scheme;
- (c) in the reduction week in which the applicant again becomes entitled to a reduction under this scheme the relevant person is entitled to an employment and support allowance which is not income-related;
- (d) if the period between the events mentioned in paragraphs (a) and (b) is more than 12 weeks, the intervening period is one to which regulation 145(2) (linking period where applicant is a work or training beneficiary) of the Employment and Support Allowance Regulations 2008 applies in respect of the relevant person; and
- (e) at the date on which the applicant again becomes entitled to a reduction under this scheme, neither the applicant nor the applicant's partner is entitled to an income-related employment and support allowance, an income-based jobseeker's allowance, or income support.

(2) Where this paragraph applies, the applicant is entitled, with effect from the day on which the applicant again becomes entitled to a reduction under this scheme, to a transitional addition of the amount of the transitional addition that would have applied had the applicant's entitlement to a transitional addition not ended (but taking account of the effect which any intervening change of circumstances would have had by virtue of paragraph 29), unless the amount of the transitional addition would be nil.

(3) The applicant's entitlement to a transitional addition by virtue of this paragraph ends on any of the following—

- (a) the reduction of the transitional addition to nil in accordance with paragraph 29 of this Schedule;
- (b) the termination of the applicant's award of a reduction under this scheme;
- (c) the relevant person no longer being entitled to the employment and support allowance referred to in sub-paragraph (1)(c);
- (d) the applicant or the applicant's partner becoming entitled to an income-related employment and support allowance, an income-based jobseeker's allowance, or income support;
- (e) 5th April 2020.

27.—(1) This paragraph applies where—

(a) the applicant's entitlement to a transitional addition ends, by virtue of the relevant person ceasing to be entitled to an employment and support allowance, under—

- (i) paragraph 25(2)(c);
- (ii) paragraph 26(3)(c); or
- (iii) sub-paragraph (3)(c);

(b) before 5th April 2020 the relevant person again becomes entitled to an employment and support allowance which is not income-related;

(c) either—

- (i) at the date on which the relevant person again becomes entitled to an employment support allowance which is not income-related regulation 145(1) of the Employment and Support Allowance Regulations 2008 applies to the relevant person; or
- (ii) the period between the events mentioned in paragraphs (a) and (b) is one to which regulation 145(2) of the Employment and Support Allowance Regulations 2008 applies in respect of the relevant person; and

(d) at the date on which the relevant person again becomes entitled to an employment support

allowance which is not income-related, neither the applicant nor the applicant's partner is entitled to an income-related employment and support allowance, an income-based jobseeker's allowance, or income support.

(2) Where this paragraph applies, the applicant is entitled, with effect from the day that the relevant person's entitlement to employment and support allowance takes effect for the purposes of a reduction under this scheme, to a transitional addition of the amount of the transitional addition that would have applied had the applicant's entitlement to a transitional addition not ended (but taking account of the effect which any intervening change of circumstances would have had by virtue of paragraph 29 of this Schedule), unless the amount of the transitional addition would be nil.

(3) The applicant's entitlement to a transitional addition by virtue of this paragraph ends on any of the following—

- (a) the reduction of the transitional addition to nil in accordance with paragraph 29 of this Schedule;
- (b) the termination of the applicant's award of a reduction under this scheme;
- (c) the relevant person no longer being entitled to the employment and support allowance referred to in sub-paragraph (1)(b);
- (d) the applicant or the applicant's partner becoming entitled to an income-related employment and support allowance, an income-based jobseeker's allowance, or income support;
- (e) 5th April 2020.

PART 8 - Amount of Transitional Addition

28.—(1) Subject to paragraph 29 of this Schedule, the amount of the transitional addition is the amount by which Amount A exceeds Amount B.

(2) Where a conversion decision as described in regulation 5(2)(a) of the Employment and Support Allowance (Transitional Provisions, Housing Benefit and Council Tax Benefit) (Existing Awards) (No. 2) Regulations 2010 (“the 2010 Regulations”) is made in respect of the relevant person—

- (a) Amount A is the basic amount that would have applied on the day that decision took effect had that decision not been made; and
- (b) Amount B is the basic amount that applied on that day as a result of that decision.

(3) Where the relevant person is appealing a conversion decision as described in regulation 5(2)(b) of the 2010 Regulations and is treated as having limited capability for work by virtue of regulation 30 of the Employment and Support Allowance Regulations 2008 as modified by the 2010 Regulations—

- (a) Amount A is the basic amount that would have applied on the day the relevant person was first treated as having limited capability for work if the relevant person had not been so treated; and
- (b) Amount B is the basic amount that applied on that day as a result of the relevant person being so treated.

(4) In this paragraph and paragraph 29, “basic amount” means the aggregate of such amounts as may apply in the applicant’s case in accordance with paragraph 25(1)(a) to (e) or paragraph 26(1)(a) to (f) of this scheme.

29.—(1) Subject to sub-paragraph (2), where there is a change of circumstances which leads to an increase in the applicant’s basic amount, the transitional addition that applies immediately before the change of circumstances shall be reduced by the amount by which Amount C exceeds Amount D.

(2) If Amount C exceeds Amount D by more than the amount of the transitional addition that applies immediately before the change of circumstances, that transitional addition shall be reduced to nil.

(3) Amount C is the basic amount that applies as a result of the increase.

(4) Amount D is the basic amount that applied immediately before the increase.

SCHEDULE 3 Amount of alternative maximum council tax reduction: pensioners and persons who are not pensioners.

Paragraph 31

1.—(1) Subject to paragraphs 2 and 3, the alternative maximum council tax reduction in respect of a day for the purpose of paragraph 30 is determined in accordance with the following Table and in this Table—

- (a) “second adult” means any person or persons residing with the applicant to whom paragraph 15(2) of this scheme applies; and
- (b) “persons to whom paragraph 71(1) of this scheme applies” includes any person to whom that paragraph would apply were they, and their partner if they had one, below the qualifying age for state pension credit.

(2) In this Schedule “council tax due in respect of that day” means the council tax payable under section 10 of the 1992 Act less—

- (a) any reductions made in consequence of any enactment in, or under, the 1992 Act (other than a reduction under this scheme); and
- (b) in a case to which sub-paragraph (c) in column (1) of the table below applies, the amount of any discount which may be appropriate to the dwelling under the 1992 Act.

(1) <i>Second adult</i>	(2) <i>Alternative maximum council tax support</i>
(a) Where the second adult or all second adults are in receipt of income support, an income-related employment and support allowance or state pension credit or are persons on an income-based jobseeker’s allowance, or are under the age of 25 and in receipt of Universal Credit where the award is calculated on the basis that the second adult does not have any earned income (as given in regulation 52 of the Universal Credit Regulations 2013)	(a) 25 per cent of the council tax due in respect of that day;
(b) where the gross income of the second adult or, where there is more than one second adult, their aggregate gross income disregarding any income of persons on income support, an income-related employment and support allowance, state pension credit or an income-based jobseeker’s allowance—	(b)
(i) is less than £265.00 per week;	(i) 15 per cent of the council tax due in respect of that day;
(ii) is not less than £265.00 per week but less than £344.00 per week;	(ii) 7.5 per cent of the council tax due in respect of that day;
(c) where the dwelling would be wholly occupied by one or more persons to whom paragraph 71(1) of this scheme applies but for the presence of one or more second adults who are in receipt of income support, state pension credit, an income-related employment and support allowance or are persons on an income-based jobseeker’s allowance.	(c) 100 per cent of the council tax due in respect of that day.

2. In determining a second adult’s gross income for the purposes of this Schedule, there shall be disregarded from that income—

- (a) any attendance allowance, any disability living allowance under section 71 of the SSCBA, or any personal independence payment under Part 4 of the Welfare Reform Act 2012;
- (b) any payment made under or by the Trusts, the Fund, the Eileen Trust, MFET Limited, the Skipton Fund, the Caxton Foundation, or the Independent Living Fund (2006) which, had his income fallen to be calculated under paragraph 53 (calculation of income other than earnings: persons who are not pensioners), would have been disregarded under paragraph 28 of Schedule 8 (income in kind); and
- (c) any payment which, had his income fallen to be calculated under paragraph 53, would have been disregarded under paragraph 41 of Schedule 8 (payments made under certain trusts and certain other payments).

3. Where there are two or more second adults residing with the applicant for a reduction under this scheme and any such second adult falls to be disregarded for the purposes of discount in accordance with Schedule 1 to the 1992 Act, his income shall be disregarded in determining the amount of any alternative maximum council tax reduction, unless that second adult is a member of a couple and his partner does not fall to be disregarded for the purposes of discount.

SCHEDULE 4 Sums disregarded from applicant's earnings: pensioners.

Paragraph 40

1. Where two or more of paragraphs 2 to 5 apply in any particular case the overall maximum sum which falls to be disregarded in that case under those paragraphs is restricted to—
 - (a) £25 in the case of a lone parent;
 - (b) £20 in any other case.
2. In a case where an applicant is a lone parent, £25 of earnings.
- 3.—(1) In a case of earnings from any employment or employments to which sub-paragraph (2) applies, £20.
 - (2) This paragraph applies to employment—
 - (a) as a part-time fire-fighter employed by a fire and rescue authority constituted by a scheme under section 2 of the Fire and Rescue Services Act 2004 or a scheme to which section 4 of that Act applies;
 - (b) a part-time fire-fighter employed by the Scottish Fire and Rescue Service established under section 1A of the Fire (Scotland) Act 2005 as an auxiliary coastguard in respect of coast rescue activities;
 - (d) in the manning or launching of a lifeboat if the employment is part-time;
 - (e) as a member of any territorial or reserve force prescribed in Part I of Schedule 6 to the Social Security (Contributions) Regulations 2001.
 - (3) If—
 - (a) any of the earnings of the applicant or, if he has a partner, his partner, or both of them, are disregarded under sub-paragraph (1); and
 - (b) either of them has, or both of them have, other earnings, so much of those other earnings as would not, in the aggregate with the earnings disregarded under that sub-paragraph, exceed £20.
- 4.—(1) If the applicant or, if he has a partner, his partner is a carer, or both are carers, £20 of any earnings received from his or their employment.
 - (2) Where the carer premium is awarded in respect of the applicant and of any partner of his, their earnings shall for the purposes of this paragraph be aggregated, but the amount to be disregarded in accordance with sub-paragraph (1) shall not exceed £20 of the aggregated amount.
 - (3) In this paragraph the applicant or his partner is a carer if paragraph 14 of Part 3 of Schedule 3 (amount applicable for carers) is satisfied in respect of him.
- 5.—(1) £20 is disregarded if the applicant or, if he has a partner, his partner—
 - (a) is in receipt of—
 - (i) long-term incapacity benefit under section 30A of the SSCBA;
 - (ii) severe disablement allowance under section 68 of that Act;
 - (iii) attendance allowance under sections 64 to 76 of that Act;
 - (iv) disability living allowance under section 71 to 76 of that Act;
 - (v) personal independence payment under Part 4 of the Welfare Reform Act 2012;
 - (vi) any mobility supplement under article 20 of the Naval, Military and Air Forces Etc. (Disablement and Death) Service Pensions Order 2006 (including such a supplement by virtue of any other scheme or order) or under article 25A of the Personal Injuries (Civilians) Scheme 1983;
 - (vii) the disability element or the severe disability element of working tax credit under Schedule 2 to the Working Tax Credit (Entitlement and Maximum Rate) Regulations 2002; or
 - (viii) main phase employment and support allowance; or
 - (b) is or are registered as blind in a register compiled by a local authority under section 29 of the National Assistance Act 1948 (welfare services) or, in Scotland, has been certified as blind and in consequence is registered in a register maintained by or on behalf of a council constituted under section 2 of the Local Government (Scotland) Act 1994; or

(c) is, or is treated as, incapable of work in accordance with the provisions of, and regulations made under, Part 12A of the SSCBA (incapacity for work), and has been incapable, or has been treated as incapable, of work for a continuous period of not less than—

(i) in the case of an applicant who is terminally ill within the meaning of section 30B(4) of the Act, 196 days;

(ii) in any other case, 364 days; or

(d) has, or is treated as having, limited capacity for work within the meaning of section 1(4) of the Welfare Reform Act 1997 or limited capability for work-related activity within the meaning of section 2(5) of that Act and either—

(i) the assessment phase as defined in section 24(2) of the Welfare Reform Act has ended; or (ii) regulation 7 of the Employment and Support Allowance Regulations 2008 or regulation 7 of the Employment and Support Regulations 2013; (circumstances where the condition that the assessment phase has ended before entitlement to the support component or the work-related activity component arising does not apply) applies.

(2) Subject to sub-paragraph (3), £20 is disregarded if the applicant or, if he has a partner, his partner has, within a period of 8 weeks ending on the day in respect of which the applicant or his partner attains the qualifying age for state pension credit, had an award of housing benefit or council tax benefit or been in receipt of a reduction under this scheme and—

(a) £20 was disregarded in respect of earnings taken into account in that award; and

(b) the person whose earnings qualified for the disregard continues in employment after the termination of that award.

(3) The disregard of £20 specified in sub-paragraph (2) applies so long as there is no break, other than a break which does not exceed 8 weeks, in a person's—

(a) entitlement to housing benefit; or

(b) receipt of a reduction under a council tax reduction scheme; or

(c) employment, following the first day in respect of which that benefit is awarded under this scheme.

(4) £20 is the maximum amount which may be disregarded under this paragraph, notwithstanding that, where the applicant has a partner, both the applicant and his partner satisfy the requirements of this paragraph.

6.—(1) Where—

(a) the applicant (or if the applicant is a member of a couple, at least one member of that couple) is a person to whom sub-paragraph (5) applies;

(b) the Secretary of State is satisfied that that person is undertaking exempt work as defined in sub-paragraph (6); and

(c) paragraph 34 does not apply,

the amount specified in sub-paragraph (7) (“the specified amount”).

(2) Where this paragraph applies, paragraphs 1 to 5 and 8 do not apply; but in any case, where the applicant is a lone parent, and the specified amount would be less than the amount specified in paragraph 2, then paragraph 2 applies instead of this paragraph.

(3) Notwithstanding paragraph 26 (calculation of income and capital of members applicant's family and of a polygamous marriage), if sub-paragraph (1) applies to one member of a couple (“A”) it shall not apply to the other member of that couple (“B”) except to the extent provided in sub-paragraph (4).

(4) Where A's earnings are less than the specified amount, there shall also be disregarded so much of B's earnings as would not when aggregated with A's earnings exceed the specified amount; but the amount of B's earnings which may be disregarded under this sub-paragraph is limited to a maximum of £20 unless the Secretary of State is satisfied that B is also undertaking exempt work.

(5) This sub-paragraph applies to a person who is—

(a) in receipt of a contributory employment and support allowance;

(b) in receipt of incapacity benefit;

(c) in receipt of severe disablement allowance;

(d) being credited with earnings on the grounds of incapacity for work or limited capability for work under regulation 8B of the Social Security (Credits) Regulations 1975.

(6) “Exempt work” means work of the kind described in—
(a) regulation 45(2), (3) or (4) of the Employment and Support Allowance Regulations 2008 or regulation 39 (1)(a), (b) or (c) of the Employment and Support Allowance Regulations 2013; or (as the case may be); or
(b) regulation 17(2), (3) or (4) of the Social Security (Incapacity for Work) (General) Regulations 1995,
and, in determining for the purposes of this paragraph whether an applicant or a member of a couple is undertaking any type of exempt work, it is immaterial whether that person or their partner is also undertaking other work.

(7) The specified amount is the amount of money from time to time mentioned in any provision referred to in sub-paragraph (6) by virtue of which the work referred to in sub-paragraph (1) is exempt (or, where more than one such provision is relevant and those provisions mention different amounts of money, the highest of those amounts).

7. Any amount or the balance of any amount which would fall to be disregarded under paragraph 18 or 19 of Schedule 6 had the applicant's income which does not consist of earnings been sufficient to entitle him to the full amount disregarded there under.

8. Except where the applicant or his partner qualifies for a £20 disregard under the preceding provisions of this Schedule—

- (a) £5 shall be disregarded if an applicant who has no partner has earnings;
- (b) £10 shall be disregarded if an applicant who has a partner has earnings.

9. Any earnings, other than earnings referred to in paragraph 39(8)(b), derived from employment which ended before the day in respect of which the applicant first satisfies the conditions for entitlement to a reduction under this scheme.

10.—(1) In a case where the applicant is a person who satisfies at least one of the conditions set out in sub-paragraph (2), and his net earnings equal or exceed the total of the amounts set out in sub-paragraph (3), the amount of his earnings that falls to be disregarded under this Schedule shall be increased by £17.10.

(2) The conditions of this sub-paragraph are that—

- (a) the applicant, or if he has a partner, either the applicant or his partner, is a person to whom regulation 20(1)(c) of the Working Tax Credit (Entitlement and Maximum Rate) Regulations 2002 applies; or
- (b) the applicant—
 - (i) is, or any partner of his is, aged at least 25 and is engaged in remunerative work for on average not less than 30 hours per week; or
 - (ii) if he is a member of a couple—
 - (aa) at least one member of that couple is engaged in remunerative work for on average not less than 16 hours per week; and
 - (bb) his family includes at least one child or young person;
 - (iii) is a lone parent who is engaged in remunerative work for on average not less than 16 hours per week; or
 - (iv) is, or if he has a partner, one of them is, engaged in remunerative work for on average not less than 16 hours per week and paragraph 5(1) above is satisfied in respect of that person.

(3) The following are the amounts referred to in sub-paragraph (1)—

- (a) any amount disregarded under this Schedule;
- (b) the amount of child care charges calculated as deductible under paragraph 56(1)(c); and
- (c) £17.10.

(4) The provisions of paragraph 10 of this scheme shall apply in determining whether or not a person works for on average not less than 30 hours per week, but as if the reference to 16 hours in sub-paragraph (1) of that paragraph was a reference to 30 hours.

11. Where a payment of earnings is made in a currency other than Sterling, any banking charge or commission payable in converting to that payment into Sterling.

SCHEDULE 5 Amounts to be disregarded in the calculation of income other than earnings: pensioners.

Paragraph 40

1.(1) 100% of any of the following—

- (a) a war disablement pension (except insofar as such a pension falls to be disregarded under paragraph 2 or 3);
- (b) a war widow's pension or war widower's pension;
- (c) a pension payable to a person as a widow, widower or surviving civil partner under any power of Her Majesty otherwise than under an enactment to make provision about pensions for or in respect of persons who have been disabled or have died in consequence of service as members of the armed forces of the Crown;
- (d) a guaranteed income payment and, if the amount of that payment has been abated to less than £10 by a pension or payment falling within article 39(1)(a) or (b) of the Armed Forces and Reserve Forces (Compensation Scheme) Order 2011, so much of that pension or payment as would not, in aggregate with the amount of any guaranteed income payment disregarded, exceed £10;
- (e) a payment made to compensate for the non-payment of such a pension or payment as is mentioned in any of the preceding sub-paragraphs;
- (f) a pension paid by the government of a country outside Great Britain which is analogous to any of the pensions or payments mentioned in sub-paragraphs (a) to (d) above;
- (g) a pension paid by a government to victims of National Socialist persecution.

(2) The amounts to be disregarded under paragraph 1 include any amount included in a pension to which this paragraph relates in respect of the applicant's need for constant attendance or the applicant's exceptionally severe disablement

2. Any mobility supplement under article 20 of the Naval, Military and Air Forces Etc. (Disablement and Death) Service Pensions Order 2006 (including such a supplement by virtue of any other scheme or order) or under article 25A of the Personal Injuries (Civilians) Scheme 1983 or any payment intended to compensate for the non-payment of such a supplement.

3. Any supplementary pension under article 23(2) of the Naval, Military and Air Forces Etc. (Disablement and Death) Service Pensions Order 2006 (pensions to surviving spouses and surviving civil partners) and any analogous payment made by the Secretary of State for Defence to any person who is not a person entitled under that Order.

4. In the case of a pension awarded at the supplementary rate under article 27(3) of the Personal Injuries (Civilians) Scheme 1983 (pensions to widows, widowers or surviving civil partners), the sum specified in paragraph 1(c) of Schedule 4 to that Scheme.

5 Not used.

6.—(1) Any payment which is—

- (a) made under any of the Dispensing Instruments to a widow, widower or surviving civil partner of a person—
 - (i) whose death was attributable to service in a capacity analogous to service as a member of the armed forces of the Crown; and
 - (ii) whose service in such capacity terminated before 31st March 1973; and
- (b) equal to the amount specified in article 23(2) of the Naval, Military and Air Forces Etc. (Disablement and Death) Service Pensions Order 2006.

(2) In this paragraph “the Dispensing Instruments” means the Order in Council of 19th December 1881, the Royal Warrant of 27th October 1884 and the Order by His Majesty of 14th January 1922 (exceptional grants of pay, non-effective pay and allowances).

7. £15 of any widowed parent's allowance to which the applicant is entitled under section 39A of the SSCBA.

8. £15 of any widowed mother's allowance to which the applicant is entitled under section 37 of the SSCBA.

9. Where the applicant occupies a dwelling as his home and he provides in that dwelling board and lodging accommodation, an amount, in respect of each person for whom such accommodation is provided for the whole or any part of a week, equal to—

- (a) where the aggregate of any payments made in respect of any one week in respect of such accommodation provided to such person does not exceed £20, 100 per cent. of such payments; or
- (b) where the aggregate of any such payments exceeds £20, £20 and 50 per cent. of the excess over £20.

10. If the applicant—

- (a) owns the freehold or leasehold interest in any property or is a tenant of any property; and
- (b) occupies a part of that property; and
- (c) has an agreement with another person allowing that person to occupy another part of that property on payment of rent and—
 - (i) the amount paid by that person is less than £20 per week, the whole of that amount;
 - or
 - (ii) the amount paid is £20 or more per week, £20.

11. Where an applicant receives income under an annuity purchased with a loan, which satisfies the following conditions—

- (a) that the loan was made as part of a scheme under which not less than 90 per cent. of the proceeds of the loan were applied to the purchase by the person to whom it was made of an annuity ending with his life or with the life of the survivor of two or more persons (in this paragraph referred to as “the annuitants”) who include the person to whom the loan was made;
- (b) that at the time the loan was made the person to whom it was made or each of the annuitants had attained the age of 65 or if it was higher at the time, pensionable age;
- (c) that the loan was secured on a dwelling in Great Britain and the person to whom the loan was made or one of the annuitants owns an estate or interest in that dwelling;
- (d) that the person to whom the loan was made or one of the annuitants occupies the dwelling on which it was secured as his home at the time the interest is paid; and
- (e) that the interest payable on the loan is paid by the person to whom the loan was made or by one of the annuitants, the amount, calculated on a weekly basis, equal to—
 - (i) where, or insofar as, section 369 of the Income and Corporation Taxes Act 1988 (mortgage interest payable under deduction of tax) applies to the payments of interest on the loan, the interest which is payable after deduction of a sum equal to income tax on such payments at the applicable percentage of income tax within the meaning of section 369(1A) of that Act;
 - (ii) in any other case, the interest which is payable on the loan without deduction of such a sum.

12.—(1) Any payment, other than a payment to which sub-paragraph (2) applies, made to the applicant by Trustees in exercise of a discretion exercisable by them.

(2) This sub-paragraph applies to payments made to the applicant by Trustees in exercise of a discretion exercisable by them for the purpose of—

- (a) obtaining food, ordinary clothing or footwear or household fuel;
- (b) the payment of rent, council tax or water charges for which that applicant or his partner is liable;
- (c) meeting housing costs of a kind specified in Schedule 2 to the State Pension Credit Regulations 2002.

(3) In a case to which sub-paragraph (2) applies, £20 or—

- (a) if the payment is less than £20, the whole payment;
- (b) if, in the applicant's case, £10 is disregarded in accordance with paragraph 1(a) to (g), £10 or the whole payment if it is less than £10; or
- (c) if, in the applicant's case, £15 is disregarded under paragraph 7 or paragraph 8 and—
 - (i) he has no disregard under paragraph 1(a) to (g), £5 or the whole payment if it is less than £5;
 - (ii) he has a disregard under paragraph 1(a) to (g), nil.

(4) For the purposes of this paragraph, “ordinary clothing or footwear” means clothing or footwear for normal daily use, but does not include school uniforms, or clothing and footwear used solely for sporting activities.

13. Any increase in pension or allowance under Part 2 or 3 of the Naval, Military and Air Forces Etc. (Disablement and Death) Service Pensions Order 2006 paid in respect of a dependent other than the pensioner's partner.

14. Any payment ordered by a court to be made to the applicant or the applicant's partner in consequence of any accident, injury or disease suffered by the person or a child of the person to or in respect of whom the payments are made.

15. Periodic payments made to the applicant or the applicant's partner under an agreement entered into in settlement of a claim made by the applicant or, as the case may be, the applicant's partner for an injury suffered by him.

16. Any income which is payable outside the United Kingdom for such period during which there is a prohibition against the transfer to the United Kingdom of that income.

17. Any banking charges or commission payable in converting to Sterling payments of income made in a currency other than Sterling.

18. Where the applicant makes a parental contribution in respect of a student attending a course at an establishment in the United Kingdom or undergoing education in the United Kingdom, which contribution has been assessed for the purposes of calculating—

(a) under, or pursuant to regulations made under powers conferred by, section 1 or 2 of the Education Act 1962 or section 22 of the Teaching and Higher Education Act 1998, that student's award;

(b) under regulations made in exercise of the powers conferred by section 49 of the Education (Scotland) Act 1980, that student's bursary, scholarship, or other allowance under that section or under regulations made in exercise of the powers conferred by section 73 of that Act of 1980, any payment to that student under that section; or

(c) the student's student loan, an amount equal to the weekly amount of that parental contribution, but only in respect of the period for which that contribution is assessed as being payable.

19.—(1) Where the applicant is the parent of a student aged under 25 in advanced education who either—

(a) is not in receipt of any award, grant, or student loan in respect of that education; or
(b) is in receipt of an award under section 2 of the Education Act 1962 (discretionary awards) or an award bestowed by virtue of the Teaching and Higher Education Act 1998, or regulations made there under, or a bursary, scholarship or other allowance under section 49(1) of the Education (Scotland) Act 1980, or a payment under section 73 of that Act of 1980, and the applicant makes payments by way of a contribution towards the student's maintenance, other than a parental contribution falling within paragraph 18, an amount specified in subparagraph (2) in respect of each week during the student's term.

(2) For the purposes of sub-paragraph (1), the amount shall be equal to—

(a) the weekly amount of the payments; or

(b)) the amount by way of a personal allowance for a single applicant under 25 less the weekly amount of any award, bursary, scholarship, allowance, or payment referred to in subparagraph (1)(b),
whichever is less.

20.—(1) Where an applicant's family includes at least one child or young person £15 of any payment of maintenance, whether under a court order or not, which is made or due to be made by the applicant's spouse, civil partner, former spouse or former civil partner or the applicant's partner's spouse, civil partner, former spouse, or former civil partner.

(2) For the purposes of sub-paragraph (1), where more than one maintenance payment falls to be taken into account in any week, all such payments shall be aggregated and treated as if they were a single payment.

21. Except in a case which falls under paragraph 10 of Schedule 5, where the applicant is a person who satisfies any of the conditions of sub-paragraph (2) of that paragraph, any amount of working tax credit up to £17.10.

22. Where the total value of any capital specified in Part 2 (capital disregarded only for the purposes of determining deemed income) of Schedule 9 does not exceed £10,000, any income actually derived from such capital.

23. Except in the case of income from capital specified in Part 2 of Schedule 9, any actual income from capital.

24. Where the applicant, or the person who was the partner of the applicant on 31st March 2003, was entitled on that date to income support or an income-based jobseeker's allowance but ceased to be so entitled on or before 5th April 2003 by virtue only of regulation 13 of the Housing Benefit (General) Amendment (No. 3) Regulations 1999 as in force at that date, the whole of his income.

25. Any victims' payment under the Victims' Payments Regulations 2020.

26. Provision for all applicants: Homes for Ukraine scheme

(1) Any payment made in connection with the Homes for Ukraine scheme is to be disregarded in determining—

- (a) an applicant's entitlement to a reduction under the scheme; or
- (b) the amount of any reduction to which the applicant is entitled.

(2) In this regulation—

“the Homes for Ukraine scheme” means the Homes for Ukraine sponsorship scheme which was announced in Parliament by the Secretary of State for Levelling Up, Housing and Communities on 14th March 2022

SCHEDULE 6 Sums disregarded in the calculation of earnings: persons who are not pensioners.

Paragraph 53

1. In the case of an applicant who has been engaged in remunerative work as an employed earner or, had the employment been in Great Britain, would have been so engaged—
 - (a) where—
 - (i) the employment has been terminated because of retirement; and
 - (ii) on retirement he is entitled to a retirement pension under the Act, or is not so entitled solely because of his failure to satisfy the contribution conditions, any earnings paid or due to be paid in respect of that employment, but only for a period commencing on the day immediately after the date on which the employment was terminated;
 - (b) where before the first day of entitlement to a reduction under this scheme the employment has been terminated otherwise than because of retirement, any earnings paid or due to be paid in respect of that employment except—
 - (i) any payment of the nature described in—
 - (aa) paragraph 51(1)(e) (retainer), or
 - (bb) section 28, 64 or 68 of the Employment Rights Act 1996 (guarantee payments, suspension from work on medical or maternity grounds); and
 - (ii) any award, sum or payment of the nature described in—
 - (aa) paragraph 51(1)(g) or (i) (compensation etc. relating to employment), or
 - (bb) section 34 or 70 of the Employment Rights Act 1996 (guarantee payments and suspension from work: complaints to employment tribunals), including any payment made following the settlement of a complaint to an employment tribunal or of court proceedings;
 - (c) where before the first day of entitlement to a reduction under this scheme—
 - (i) the employment has not been terminated, but
 - (ii) the applicant is not engaged in remunerative work, any earnings paid or due to be paid in respect of that employment except any payment or remuneration of the nature described in paragraph (b)(i) or (ii)(bb) or paragraph 51(1)(j) (statutory sick pay etc.).
2. In the case of an applicant who, before the first day of entitlement to a reduction under this scheme—
 - (a) has been engaged in part-time employment as an employed earner or, where the employment has been outside Great Britain, would have been so engaged had the employment been in Great Britain; and
 - (b) has ceased to be engaged in that employment, whether or not that employment has been terminated, any earnings paid or due to be paid in respect of that employment except—
 - (i) where that employment has been terminated, any payment of the nature described in paragraph 1(b)(i) or (ii)(bb);
 - (ii) where that employment has not been terminated, any payment or remuneration of the nature described in paragraph 1(b)(i) or (ii)(bb) or paragraph 51(1)(j) (statutory sick pay etc.).
3. In the case of an applicant who has been engaged in remunerative work or part-time employment as a self-employed earner or, had the employment been in Great Britain, would have been so engaged and who has ceased to be so employed, from the date of the cessation of his employment, any earnings derived from that employment except earnings to which paragraph 53(3) and (4) (earnings of self-employed earners) apply.
- 4.—(1) In a case to which this paragraph applies and paragraph 5 does not apply, £20; but notwithstanding paragraph 33 (calculation of income and capital of members of an applicant's family and of a polygamous marriage) if this paragraph applies to an applicant, it does not apply to his partner except where, and to the extent that, the earnings of the applicant which are to be disregarded under this paragraph are less than £20.

(2) This paragraph applies where the applicant's applicable amount includes an amount by way of the disability premium, severe disability premium, work-related activity component or support component under Schedule 3 (applicable amounts: persons who are not pensioners).

- (3) This paragraph applies where—
- (a) the applicant is a member of a couple and his applicable amount includes an amount by way of the disability premium under Schedule 3; and
 - (b) he or his partner has not attained the qualifying age for state pension credit and at least one is engaged in employment.
5. In a case where the applicant is a lone parent, £25.
- 6.—(1) In a case to which neither paragraph 4 nor paragraph 5 applies to the applicant and, subject to sub-paragraph (2), where the applicant's applicable amount includes an amount by way of the carer premium under Schedule 3 (applicable amounts: persons who are not pensioners), £20 of the earnings of the person who is, or at any time in the preceding eight weeks was, in receipt of carer's allowance or treated in accordance with paragraph 14(2) of that Schedule as being in receipt of carer's allowance.
- (2) Where the carer premium is awarded in respect of the applicant and of any partner of his, their earnings must for the purposes of this paragraph be aggregated, but the amount to be disregarded in accordance with sub-paragraph (1) must not exceed £20 of the aggregated amount.
7. Where the carer premium is awarded in respect of an applicant who is a member of a couple and whose earnings are less than £20, but is not awarded in respect of the other member of the couple, and that other member is engaged in an employment—
- (a) specified in paragraph 9(1), so much of the other member's earnings as would not when aggregated with the amount disregarded under paragraph 6 exceed £20;
 - (b) other than one specified in paragraph 9(1), so much of the other member's earnings from such other employment up to £10 as would not when aggregated with the amount disregarded under paragraph 5 exceed £20.
8. In a case where paragraphs 4, 6, 7 and 9 do not apply to the applicant and he is one of a couple and a member of that couple is in employment, £10; but, notwithstanding paragraph 33 (calculation of income and capital of members of applicant's family and of a polygamous marriage), if this paragraph applies to an applicant it must not apply to his partner except where, and to the extent that, the earnings of the applicant which are to be disregarded under this paragraph are less than £10.
- 9.—(1) In a case where paragraphs 4, 6, 7 and 9 do not apply to the applicant, £20 of earnings derived from one or more employments as—
- (a) a part-time fire-fighter employed by a fire and rescue authority constituted by a scheme under section 2 of the Fire and Rescue Services Act 2004 or a scheme to which section 4 of that Act applies;
 - (b) a part-time fire-fighter employed by a fire and rescue authority (as defined in section 1 of the Fire (Scotland) Act 2005) or a joint fire and rescue board constituted by an amalgamation scheme made under section 2(1) of that Act;
 - (c) an auxiliary coastguard in respect of coast rescue activities;
 - (d) a person engaged part-time in the manning or launching of a life boat;
 - (e) a member of any territorial or reserve force prescribed in Part I of Schedule 6 to the Social Security (Contributions) Regulations 2001;
- but, notwithstanding paragraph 33 (calculation of income and capital of members of applicant's family and of a polygamous marriage), if this paragraph applies to an applicant, it must not apply to his partner except to the extent specified in sub-paragraph (2).
- (2) If the applicant's partner is engaged in employment—
- (a) specified in sub-paragraph (1), so much of his earnings as would not in aggregate with the amount of the applicant's earnings disregarded under this paragraph exceed £20;
 - (b) other than one specified in sub-paragraph (1), so much of his earnings from that employment up to £10 as would not in aggregate with the applicant's earnings disregarded under this paragraph exceed £20.
10. Where the applicant is engaged in one or more employments specified in paragraph 9(1), but his earnings derived from such employments are less than £20 in any week and he is also engaged in any other employment, so much of his earnings from that other employment, up to £5 if he is a single applicant, or up to £10 if he has a partner, as would not in aggregate with the amount of his earnings disregarded under paragraph 9 exceed £20.
11. In a case to which none of the paragraphs 4 to 10 applies, £5.

- 12.-(1) Where—
- (a) the applicant (or if the applicant is a member of a couple, at least one member of that couple) is a person to whom sub-paragraph (5) applies;
 - (b) the Secretary of State is satisfied that that person is undertaking exempt work as defined in sub-paragraph (6); and
 - (c) paragraph 14 does not apply,
- the amount specified in sub-paragraph (7) (“the specified amount”).
- (2) Where this paragraph applies, paragraphs 4 to 11 do not apply; but in any case, where the applicant is a lone parent, and the specified amount would be less than the amount specified in paragraph 5, then paragraph 5 applies instead of this paragraph.
- (3) Notwithstanding paragraph 33 (calculation of income and capital of members of applicant’s family and of a polygamous marriage), if sub-paragraph (1) applies to one member of a couple (“A”) it does not apply to the other member of that couple (“B”) except to the extent provided in sub-paragraph (4).
- (4) Where A’s earnings are less than the specified amount, there must also be disregarded so much of B’s earnings as would not when aggregated with A’s earnings exceed the specified amount; but the amount of B’s earnings which may be disregarded under this sub-paragraph is limited to a maximum of £20 unless the Secretary of State is satisfied that B is also undertaking exempt work.
- (5) This sub-paragraph applies to a person who is—
- (a) in receipt of a contributory employment and support allowance;
 - (b) in receipt of incapacity benefit;
 - (c) in receipt of severe disablement allowance; or
 - (d) being credited with earnings on the grounds of incapacity for work or limited capability for work under regulation 8B of the Social Security (Credits) Regulations 1975.
- (6) “Exempt work” means work of the kind described in—
- (a) regulation 45(2), (3) or (4) of the Employment and Support Allowance Regulations 2008; or (as the case may be)
 - (b) regulation 17(2), (3) or (4) of the Social Security (Incapacity for Work) (General) Regulations 1995,
- and, in determining for the purposes of this paragraph whether an applicant or a member of a couple is undertaking any type of exempt work, it is immaterial whether that person or their partner is also undertaking other work.
- (7) The specified amount is the amount of money from time to time mentioned in any provision referred to in sub-paragraph (6) by virtue of which the work referred to in sub-paragraph (1) is exempt (or, where more than one such provision is relevant and those provisions mention different amounts of money, the highest of those amounts).
13. Any amount or the balance of any amount which would fall to be disregarded under paragraph 23 or 24 of Schedule 8 had the applicant’s income which does not consist of earnings been sufficient to entitle him to the full disregard thereunder.
14. Where an applicant is on income support, an income-based jobseeker’s allowance or an income-related employment and support allowance, his earnings.
15. Any earnings derived from employment which are payable in a country outside the United Kingdom for such period during which there is a prohibition against the transfer to the United Kingdom of those earnings.
16. Where a payment of earnings is made in a currency other than Sterling, any banking charge or commission payable in converting that payment into Sterling.
17. Any earnings of a child or young person.
- 18.-(1) In a case where the applicant is a person who satisfies at least one of the conditions set out in sub-paragraph (2), and his net earnings equal or exceed the total of the amounts set out in sub-paragraph (3), the amount of his earnings that falls to be disregarded under paragraphs 4 to 12 must be increased by £17.10.

- (2) The conditions of this sub-paragraph are that—
- (a) the applicant, or if he is a member of a couple, either the applicant or his partner, is a person to whom regulation 20(1)(c) of the Working Tax Credit (Entitlement and Maximum Rate) Regulations 2002 applies; or
 - (b) the applicant—
 - (i) is, or if he is a member of a couple, at least one member of that couple is aged at least 25 and is engaged in remunerative work for on average not less than 30 hours per week; or
 - (ii) is a member of a couple and—
 - (aa) at least one member of that couple, is engaged in remunerative work for on average not less than 16 hours per week; and
 - (bb) his applicable amount includes a family premium under paragraph 4 of Schedule 3; or
 - (iii) is a lone parent who is engaged in remunerative work for on average not less than 16 hours per week; or
 - (iv) is, or if he is a member of a couple, at least one member of that couple is engaged in remunerative work for on average not less than 16 hours per week; and—
 - (aa) the applicant’s applicable amount includes a disability premium under paragraph 9, the work-related activity component under paragraph 21 or the support component under paragraph 22 of Schedule 3 respectively;
 - (bb) where he is a member of a couple, at least one member of that couple satisfies the qualifying conditions for the disability premium or either of the components referred to in paragraph (aa) above and is engaged in remunerative work for on average not less than 16 hours per week; or
 - (c) the applicant is, or if he has a partner, one of them is, a person to whom regulation 18(3) of the Working Tax Credit (Entitlement and Maximum Rate) Regulations 2002 (eligibility for 50 plus element) applies or would apply if an application for working tax credit were to be made in his case.

(3) The following are the amounts referred to in sub-paragraph (1)—

 - (a) (a) the amount calculated as disregardable from the applicant’s earnings under paragraphs 4 to 12;
 - (b) (b) the amount of child care charges calculated as deductible under paragraph 57(1)(c); and
 - (c) (c) £17.10.

(4) The provisions of paragraph 10 (remunerative work) apply in determining whether or not a person works for on average not less than 30 hours per week, but as if the reference to 16 hours in sub-paragraph (1) of that paragraph were a reference to 30 hours.

19. In this Schedule “part-time employment” means employment in which the person is engaged on average for less than 16 hours a week.

SCHEDULE 7 Sums disregarded in the calculation of income other than earnings: persons who are not pensioners.

Paragraph 54

1. Any payment made to the applicant in respect of any child care, travel or other expenses incurred, or to be incurred, by him in respect of his participation in the Work for Your Benefit Pilot Scheme.
2. Any payment made to the applicant in respect of any travel or other expenses incurred, or to be incurred, by him in respect of his participation in the Mandatory Work Activity Scheme.
3. Any payment made to the applicant in respect of any travel or other expenses incurred, or to be incurred, by him in respect of his participation in the Employment, Skills, and Enterprise Scheme.
4. Any amount paid by way of tax on income which is to be taken into account under regulation 30 (calculation of income other than earnings).
5. Any payment in respect of any expenses incurred or to be incurred by an applicant who is—
 - (a) engaged by a charitable or voluntary organisation, or
 - (b) a volunteer,if he otherwise derives no remuneration or profit from the employment and is not to be treated as possessing any earnings under paragraph 56(5) (notional income: persons who are not pensioners).
6. Any payment in respect of expenses arising out of the applicant's participation in a service user group.
7. In the case of employment as an employed earner, any payment in respect of expenses wholly, exclusively, and necessarily incurred in the performance of the duties of the employment.
8. Where an applicant is on income support, an income-based jobseeker's allowance or an income-related employment and support allowance, the whole of his income.
9. Where the applicant is a member of a joint-claim couple for the purposes of the Jobseekers Act and his partner is on an income-based jobseeker's allowance, the whole of the applicant's income.
10. Where the applicant, or the person who was the partner of the applicant on 31st March 2003, was entitled on that date to income support or an income-based jobseeker's allowance but ceased to be so entitled on or before 5th April 2003 by virtue only of regulation 13 of the Housing Benefit (General) Amendment (No. 3) Regulations 1999 as in force at that date, the whole of his income.
11. Any disability living allowance, personal independence payment or an AFIP.
12. Any concessionary payment made to compensate for the non-payment of—
 - (a) any payment specified in paragraph 11 or 14;
 - (b) income support;
 - (c) an income-based jobseeker's allowance;
 - (d) an income-related employment and support allowance.
13. Any mobility supplement under article 20 of the Naval, Military and Air Forces Etc. (Disablement and Death) Service Pensions Order 2006 (including such a supplement by virtue of any other scheme or order) or under article 25A of the Personal Injuries (Civilians) Scheme 1983 or any payment intended to compensate for the non-payment of such a supplement.
14. Any attendance allowance.
15. Any payment to the applicant as holder of the Victoria Cross or of the George Cross or any analogous payment.
- 16.—(1) Any payment—
 - (a) by way of an education maintenance allowance made pursuant to—
 - (i) regulations made under section 518 of the Education Act 1996 (payment of school expenses; grant of scholarships etc.);

- (ii) regulations made under section 49 or 73(f) of the Education (Scotland) Act 1980 (power to assist persons to take advantage of educational facilities);
- (iii) directions made under section 73ZA of the Education (Scotland) Act 1980 and paid under section 12(2)(c) of the Further and Higher Education (Scotland) Act 1992;
- (b) corresponding to such an education maintenance allowance, made pursuant to—
 - (i) section 14 or section 181 of the Education Act 2002 (power of Secretary of State and the Welsh Ministers to give financial assistance for purposes related to education or childcare, and allowances in respect of education or training); or
 - (ii) regulations made under section 181 of that Act; or
- (c) in England, by way of financial assistance made pursuant to section 14 of the Education Act 2002.

- (2) Any payment, other than a payment to which sub-paragraph (1) applies, made pursuant to—
- (a) regulations made under section 518 of the Education Act 1996;
 - (b) regulations made under section 49 of the Education (Scotland) Act 1980; or
 - (c) directions made under section 73ZA of the Education (Scotland) Act 1980 and paid under section 12(2)(c) of the Further and Higher Education (Scotland) Act 1992,
- in respect of a course of study attended by a child or a young person or a person who is in receipt of an education maintenance allowance or other payment made pursuant to any provision specified in sub-paragraph (1).

17. Any payment made to the applicant by way of a repayment under regulation 11(2) of the Education (Teacher Student Loans) (Repayment etc.) Regulations 2002.

18.—(1) Any payment made pursuant to section 2 of the 1973 Act or section 2 of the Enterprise and New Towns (Scotland) Act 1990 except a payment—

- (a) made as a substitute for income support, a jobseeker's allowance, incapacity benefit, severe disablement allowance or an employment and support allowance;
- (b) of an allowance referred to in section 2(3) of the Employment and Training Act 1973 or section 2(5) of the Enterprise and New Towns (Scotland) Act 1990; or
- (c) intended to meet the cost of living expenses which relate to any one or more of the items specified in sub-paragraph (2) whilst an applicant is participating in an education, training, or other scheme to help him enhance his employment prospects unless the payment is a Career Development Loan paid pursuant to section 2 of the 1973 Act and the period of education or training or the scheme, which is supported by that loan, has been completed.

(2) The items specified in this sub-paragraph for the purposes of sub-paragraph (1)(c) are food, ordinary clothing or footwear, household fuel or rent of the applicant or, where the applicant is a member of a family, any other member of his family, or any council tax or water charges for which that applicant or member is liable.

19.—(1) Subject to sub-paragraph (2), any of the following payments—

- (a) a charitable payment;
- (b) a voluntary payment;
- (c) a payment (not falling within paragraph (a) or (b) above) from a trust whose funds are derived from a payment made in consequence of any personal injury to the applicant;
- (d) a payment under an annuity purchased—
 - (i) pursuant to any agreement or court order to make payments to the applicant; or
 - (ii) from funds derived from a payment made, in consequence of any personal injury to the applicant; or
- (e) a payment (not falling within paragraphs (a) to (d)) received by virtue of any agreement or court order to make payments to the applicant in consequence of any personal injury to the applicant.

(2) Sub-paragraph (1) does not apply to a payment which is made or due to be made by—

- (a) a former partner of the applicant, or a former partner of any member of the applicant's family; or
- (b) the parent of a child or young person where that child or young person is a member of the applicant's family.

20. Subject to paragraph 40, any of the following, namely—

- (a) a war disablement pension (except insofar as such a pension falls to be disregarded under paragraph 13 or 14);
- (b) a war widow's pension or war widower's pension;

- (c) a pension payable to a person as a widow, widower or surviving civil partner under any power of Her Majesty otherwise than under an enactment to make provision about pensions for or in respect of persons who have been disabled or have died in consequence of service as members of the armed forces of the Crown;
- (d) a guaranteed income payment and, if the amount of that payment has been abated to less than £10 by a pension or payment falling within article 31(1)(a) or (b) of the Armed Forces and Reserve Forces (Compensation Scheme) Order 2005, so much of that pension or payment as would not, in aggregate with the amount of any guaranteed income payment disregarded, exceed £10;
- (e) a payment made to compensate for the non-payment of such a pension or payment as is mentioned in any of the preceding sub-paragraphs;
- (f) a pension paid by the government of a country outside Great Britain which is analogous to any of the pensions or payments mentioned in paragraphs (a) to (d) above;
- (g) pension paid to victims of National Socialist persecution under any special provision made by the law of the Federal Republic of Germany, or any part of it, or of the Republic of Austria.

21. Subject to paragraph 40, £15 of any—

- (a) widowed mother's allowance paid pursuant to section 37 of the SSCBA;
- (b) widowed parent's allowance paid pursuant to section 39A of the SSCBA.

22.—(1) Any income derived from capital to which the applicant is or is treated under paragraph 70 (capital jointly held) as beneficially entitled but, subject to sub-paragraph (2), not income derived from capital disregarded under paragraphs 4, 5, 7, 11, 17 or 30 to 33 of Schedule 10.

(2) Income derived from capital disregarded under paragraphs 5, 7 or 30 to 33 of Schedule 10 but only to the extent of—

- (a) any mortgage repayments made in respect of the dwelling or premises in the period during which that income accrued; or
- (b) any council tax or water charges which the applicant is liable to pay in respect of the dwelling or premises and which are paid in the period during which that income accrued.

(3) The definition of “water charges” in paragraph 2(1) (interpretation) applies to sub-paragraph (2) of this paragraph with the omission of the words “in so far as such charges are in respect of the dwelling which a person occupies as his home”.

23. Where the applicant makes a parental contribution in respect of a student attending a course at an establishment in the United Kingdom or undergoing education in the United Kingdom, which contribution has been assessed for the purposes of calculating—

- (a) under, or pursuant to regulations made under powers conferred by, section 22 of the Teaching and Higher Education Act 1998, that student's award;
- (b) under regulations made in exercise of the powers conferred by section 49 of the Education (Scotland) Act 1980, that student's bursary, scholarship, or other allowance under that section or under regulations made in exercise of the powers conferred by section 73 of that Act of 1980, any payment to that student under that section; or
- (c) the student's student loan, an amount equal to the weekly amount of that parental contribution, but only in respect of the period for which that contribution is assessed as being payable.

24.—(1) Where the applicant is the parent of a student aged under 25 in advanced education who either—

- (a) is not in receipt of any award, grant, or student loan in respect of that education; or
- (b) is in receipt of an award bestowed by virtue of the Teaching and Higher Education Act 1998, or regulations made thereunder, or a bursary, scholarship, or other allowance under section 49(1) of the Education (Scotland) Act 1980, or a payment under section 73 of that Act of 1980, and the applicant makes payments by way of a contribution towards the student's maintenance, other than a parental contribution falling within paragraph 23, an amount specified in sub-paragraph (2) in respect of each week during the student's term.

(2) For the purposes of sub-paragraph (1), the amount must be equal to—

- (a) the weekly amount of the payments; or
- (b) the amount by way of a personal allowance for a single applicant under 25 less the weekly amount of any award, bursary, scholarship, allowance, or payment referred to in sub-paragraph (1)(b), whichever is less.

25. Any payment made to the applicant by a child or young person or a non-dependent.
26. Where the applicant occupies a dwelling as his home and the dwelling is also occupied by a person other than one to whom paragraph 25 or 27 refers and there is a contractual liability to make payments to the applicant in respect of the occupation of the dwelling by that person or a member of his family—
- (a) where the aggregate of any payments made in respect of any one week in respect of the occupation of the dwelling by that person or a member of his family, or by that person and a member of his family, is less than £20, the whole of that amount; or
 - (b) where the aggregate of any such payments is £20 or more per week, £20.
27. Where the applicant occupies a dwelling as his home and he provides in that dwelling board and lodging accommodation, an amount, in respect of each person for which such accommodation is provided for the whole or any part of a week, equal to—
- (a) where the aggregate of any payments made in respect of any one week in respect of such accommodation provided to such person does not exceed £20, 100 per cent of such payments;
 - (b) where the aggregate of any such payments exceeds £20, £20 and 50 per cent of the excess over £20.
- 28.—(1) Any income in kind, except where paragraph 54(10)(b) (provision of support under section 95 or 98 of the Immigration and Asylum Act 1999 in the calculation of income other than earnings) applies.
- (2) The reference in sub-paragraph (1) to “income in kind” does not include a payment to a third party made in respect of the applicant which is used by the third party to provide benefits in kind to the applicant.
29. Any income which is payable in a country outside the United Kingdom for such period during which there is a prohibition against the transfer to the United Kingdom of that income.
- 30.—(1) Any payment made to the applicant in respect of a person who is a member of his family—
- (a) pursuant to regulations under section 2(6)(b), 3 or 4 of the Adoption and Children Act 2002 or in accordance or with a scheme approved by the Scottish Ministers under section 51A of the Adoption (Scotland) Act 1978(200) (schemes for payments of allowances to adopters) or in accordance with an adoption allowance scheme made under section 71 of the Adoption and Children (Scotland) Act 2007 (adoption allowances schemes);
 - (b) which is a payment made by a local authority in pursuance of section 15(1) of, and paragraph 15 of Schedule 1 to, the Children Act 1989 (local authority contribution to a child’s maintenance where the child is living with a person as a result of a residence order) or in Scotland section 50 of the Children Act 1975 (payments towards maintenance of children);
 - (c) which is a payment made by an authority, as defined in Article 2 of the Children (Northern Ireland) Order 1995, in pursuance of Article 15 of, and paragraph 17 of Schedule 1 to, that Order (contribution by an authority to child’s maintenance);
 - (d) in accordance with regulations made pursuant to section 14F of the Children Act 1989 (special guardianship support services);
- (2) Any payment, other than a payment to which sub-paragraph (1)(a) applies, made to the applicant pursuant to regulations under section 2(6)(b), 3 or 4 of the Adoption and Children Act 2002.
31. Any payment made to the applicant with whom a person is accommodated by virtue of arrangements made—
- (a) by a local authority under—
 - (i) section 23(2)(a) of the Children Act 1989 (provision of accommodation and maintenance for a child whom they are looking after),
 - (ii) section 26 of the Children (Scotland) Act 1995 (manner of provision of accommodation to child looked after by local authority), or
 - (iii) regulations 33 or 51 of the Looked After Children (Scotland) Regulations 2009 (fostering and kinship care allowances and fostering allowances); or
 - (b) by a voluntary organisation under section 59(1)(a) of the Children Act 1989 (provision of accommodation by voluntary organisations).
32. Any payment made to the applicant or his partner for a person (“the person concerned”), who is not normally a member of the applicant’s household but is temporarily in his care, by—
- (a) a health authority;

- (b) a local authority but excluding payments of housing benefit made in respect of the person concerned;
- (c) a voluntary organisation;
- (d) the person concerned pursuant to section 26(3A) of the National Assistance Act 1948;
- (e) a primary care trust established under section 16A of the National Health Service Act 1977 or established by an order made under section 18(2)(c) of the National Health Service Act 2006; or
- (f) a Local Health Board established under section 11 of the National Health Service (Wales) Act 2006.

33. Any payment made by a local authority in accordance with section 17, 23B, 23C or 24A of the Children Act 1989 or, as the case may be, section 12 of the Social Work (Scotland) Act 1968 or section 22, 29 or 30 of the Children (Scotland) Act 1995 (provision of services for children and their families and advice and assistance to certain children).

34.—(1) Subject to sub-paragraph (2), any payment (or part of a payment) made by a local authority in accordance with section 23C of the Children Act 1989 or section 29 of the Children (Scotland) Act 1995 (local authorities' duty to promote welfare of children and powers to grant financial assistance to persons in, or formerly in, their care) to a person ("A") which A passes on to the applicant.

- (2) Sub-paragraph (1) applies only where A—
- (a) was formerly in the applicant's care, and
 - (b) is aged 18 or over, and
 - (c) continues to live with the applicant.

35.—(1) Subject to sub-paragraph (2), any payment received under an insurance policy taken out to insure against the risk of being unable to maintain repayments—

- (a) on a loan which is secured on the dwelling which the applicant occupies as his home; or
- (b) under a regulated agreement as defined for the purposes of the Consumer Credit Act 1974(201) or under a hire-purchase agreement or a conditional sale agreement as defined for the purposes of Part 3 of the Hire-Purchase Act 1964.

(2) A payment referred to in sub-paragraph (1) is only to be disregarded to the extent that the payment received under that policy does not exceed the amounts, calculated on a weekly basis, which are used to—

- (a) maintain the repayments referred to in sub-paragraph (1)(a) or, as the case may be, (1)(b); and
- (b) meet any amount due by way of premiums on—
 - (i) that policy; or
 - (ii) in a case to which sub-paragraph (1)(a) applies, an insurance policy taken out to insure against loss or damage to any building or part of a building which is occupied by the applicant as his home and which is required as a condition of the loan referred to in sub-paragraph (1)(a).

36. Any payment of income which by virtue of paragraph 64 (income treated as capital: persons who are not pensioners) is to be treated as capital.

37. Any—
- (a) social fund payment made pursuant to Part 8 of the SSCBA (the social fund); or
 - (b) occasional assistance.

38. Any payment under Part 10 of the SSCBA (Christmas bonus for pensioners).

39. Where a payment of income is made in a currency other than sterling, any banking charge or commission payable in converting that payment into sterling.

40. The total of an applicant's income or, if he is a member of a family, the family's income and the income of any person which he is treated as possessing under paragraph 33(3) (calculation of income and capital of members of applicant's family and of a polygamous marriage) to be disregarded under paragraph 77(2)(b) and paragraph 78(1)(d) (calculation of covenant income where a contribution assessed, covenant income where no grant income or no contribution is assessed), paragraph 81(2) (treatment of student loans), paragraph 82(3) (treatment of payments from access funds) and paragraphs 20 and 21 must in no case exceed £20 per week.

41.—(1) Any payment made under or by any of the Trusts, the Fund, the Eileen Trust, MFET Limited, the Skipton Fund, the Caxton Foundation, or the Independent Living Fund (2006).

(2) Any payment by or on behalf of a person who is suffering or who suffered from haemophilia or who is or was a qualifying person, which derives from a payment made under or by any of the Trusts to which sub-paragraph (1) refers and which is made to or for the benefit of—

- (a) that person's partner or former partner from whom he is not, or where that person has died was not, estranged or divorced or with whom he has formed a civil partnership that has not been dissolved or, where that person has died, had not been dissolved at the time of that person's death;
- (b) any child who is a member of that person's family or who was such a member and who is a member of the applicant's family; or
- (c) any young person who is a member of that person's family or who was such a member and who is a member of the applicant's family.

(3) Any payment by or on behalf of the partner or former partner of a person who is suffering or who suffered from haemophilia or who is or was a qualifying person provided that the partner or former partner and that person are not, or if either of them has died were not, estranged or divorced or, where the partner or former partner and that person have formed a civil partnership, the civil partnership has not been dissolved or, if either of them has died, had not been dissolved at the time of the death, which derives from a payment made under or by any of the Trusts to which sub-paragraph (1) refers and which is made to or for the benefit of—

- (a) the person who is suffering from haemophilia or who is a qualifying person;
- (b) any child who is a member of that person's family or who was such a member and who is a member of the applicant's family; or
- (c) any young person who is a member of that person's family or who was such a member and who is a member of the applicant's family.

(4) Any payment by a person who is suffering from haemophilia or who is a qualifying person, which derives from a payment under or by any of the Trusts to which sub-paragraph (1) refers, where—

- (a) that person has no partner or former partner from whom he is not estranged or divorced or with whom he has formed a civil partnership that has not been dissolved, nor any child or young person who is or had been a member of that person's family; and
- (b) the payment is made either—
 - (i) to that person's parent or step-parent, or
 - (ii) where that person at the date of the payment is a child, a young person or a student who has not completed his education and has no parent or step-parent, to his guardian, but only for a period from the date of the payment until the end of two years from that person's death.

(5) Any payment out of the estate of a person who suffered from haemophilia or who was a qualifying person, which derives from a payment under or by any of the Trusts to which sub-paragraph (1) refers, where—

- (a) that person at the date of his death (the relevant date) had no partner or former partner from whom he was not estranged or divorced or with whom he has formed a civil partnership that has not been dissolved, nor any child or young person who was or had been a member of his family; and
- (b) the payment is made either—
 - (i) to that person's parent or step-parent, or
 - (ii) where that person at the relevant date was a child, a young person or a student who had not completed his full-time education and had no parent or step-parent, to his guardian, but only for a period of two years from the relevant date.

(6) In the case of a person to whom or for whose benefit a payment referred to in this paragraph is made, any income which derives from any payment of income or capital made under or deriving from any of the Trusts.

(7) For the purposes of sub-paragraphs (2) to (6), any reference to the Trusts is to be construed as including a reference to the Fund, the Eileen Trust, MFET Limited, the Skipton Fund, the Caxton Foundation, and the London Bombings Relief Charitable Fund.

42. Any housing benefit.

43. Any payment made by the Secretary of State to compensate for the loss (in whole or in part) of entitlement to housing benefit.

44. Any payment to a juror or witness in respect of attendance at a court other than compensation for loss of earnings or for the loss of a benefit payable under the benefit Acts.

45. Any payment in consequence of a reduction of council tax under section 13 of the 1992 Act (reduction of liability for council tax).

46. –(1) Any payment or repayment made—

- (a) as respects England, under regulation 5, 6 or 12 of the National Health Service (Travel Expenses and Remission of Charges) Regulations 2003 (travelling expenses and health service supplies);
- (b) as respects Wales, under regulation 5, 6 or 11 of the National Health Service (Travelling Expenses and Remission of Charges) (Wales) Regulations 2007 (travelling expenses and health service supplies);
- (c) as respects Scotland, under regulation 3, 5 or 11 of the National Health Service (Travelling Expenses and Remission of Charges) (Scotland) (No. 2) Regulations 2003 (travelling expenses and health service supplies).

(2) Any payment or repayment made by the Secretary of State for Health, the Scottish Ministers or the Welsh Ministers which is analogous to a payment or repayment mentioned in sub-paragraph (1).

47. Any payment made to such persons entitled to receive benefits as may be determined by or under a scheme made pursuant to section 13 of the Social Security Act 1988 in lieu of vouchers or similar arrangements in connection with the provision of those benefits (including payments made in place of healthy start vouchers, milk tokens or the supply of vitamins).

48. Any payment made by either the Secretary of State for Justice or by the Scottish Ministers under a scheme established to assist relatives and other persons to visit persons in custody.

49. –(1) Where an applicant's applicable amount includes an amount by way of family premium, £15 of any payment of maintenance, other than child maintenance, whether under a court order or not, which is made or due to be made by the applicant's former partner, or the applicant's partner's former partner.

(2) For the purpose of sub-paragraph (1) where more than one maintenance payment falls to be taken into account in any week, all such payments must be aggregated and treated as if they were a single payment.

(3) A payment made by the Secretary of State in lieu of maintenance must, for the purpose of sub-paragraph (1), be treated as a payment of maintenance made by a person specified in sub-paragraph (1).

50. –(1) Any payment of child maintenance made or derived from a liable relative where the child or young person in respect of whom the payment is made is a member of the applicant's family, except where the person making the payment is the applicant or the applicant's partner.

(2) In sub-paragraph (1)—

“child maintenance” means any payment towards the maintenance of a child or young person, including any payment made voluntarily and payments made under—

- (a) the Child Support Act 1991(202);
- (b) the Child Support (Northern Ireland) Order 1991;
- (c) a court order;
- (d) a consent order;
- (e) a maintenance agreement registered for execution in the Books of Council and Session or the sheriff court books;

“liable relative” means a person listed in regulation 54 (interpretation) of the Income Support (General) Regulations 1987, other than a person falling within sub-paragraph (d) of that definition.

51. Any payment (other than a training allowance) made, whether by the Secretary of State or any other person, under the Disabled Persons (Employment) Act 1944(203) to assist disabled persons to obtain or retain employment despite their disability.

52. Any guardian's allowance.

53.—(1) If the applicant is in receipt of any benefit under Part 2, 3 or 5 of the SSCBA, any increase in the rate of that benefit arising under Part 4 (increases for dependants) or section 106(a) (unemployability supplement) of that Act, where the dependent in respect of whom the increase is paid is not a member of the applicant's family.

(2) If the applicant is in receipt of any pension or allowance under Part 2 or 3 of the Naval, Military and Air Forces Etc. (Disablement and Death) Service Pensions Order 2006, any increase in the rate of that pension or allowance under that Order, where the dependent in respect of whom the increase is paid is not a member of the applicant's family.

54. Any supplementary pension under article 23(2) of the Naval, Military and Air Forces Etc. (Disablement and Death) Service Pensions Order 2006 (pensions to surviving spouses and surviving civil partners) and any analogous payment made by the Secretary of State for Defence to any person who is not a person entitled under that Order.

55. In the case of a pension awarded at the supplementary rate under article 27(3) of the Personal Injuries (Civilians) Scheme 1983 (pensions to widows, widowers or surviving civil partners), the sum specified in paragraph 1(c) of Schedule 4 to that Scheme.

56.—(1) Any payment which is—

- (a) made under any of the Dispensing Instruments to a widow, widower or surviving civil partner of a person—
 - (i) whose death was attributable to service in a capacity analogous to service as a member of the armed forces of the Crown; and
 - (ii) whose service in such capacity terminated before 31st March 1973; and
- (b) equal to the amount specified in article 23(2) of the Naval, Military and Air Forces Etc. (Disablement and Death) Service Pensions Order 2006.

(2) In this paragraph “the Dispensing Instruments” means the Order in Council of 19th December 1881, the Royal Warrant of 27th October 1884 and the Order by His Majesty of 14th January 1922 (exceptional grants of pay, non-effective pay and allowances).

57. Any council tax benefit to which the applicant is entitled.

58. Except in a case which falls under sub-paragraph (1) of paragraph 18 of Schedule 7, where the applicant is a person who satisfies any of the conditions of sub-paragraph (2) of that paragraph, any amount of working tax credit up to £17.10.

59. Any payment made under section 12B of the Social Work (Scotland) Act 1968, or under sections 12A to 12D of the National Health Service Act 2006 (direct payments for health care) or under regulations made under section 57 of the Health and Social Care Act 2001 (direct payments).

60.—(1) Subject to sub-paragraph (2), in respect of a person who is receiving, or who has received, assistance under the self-employment route, any payment to that person—

- (a) to meet expenses wholly and necessarily incurred whilst carrying on the commercial activity;
 - (b) which is used or intended to be used to maintain repayments on a loan taken out by that person for the purpose of establishing or carrying on the commercial activity,
- in respect of which such assistance is or was received.

(2) Sub-paragraph (1) applies only in respect of payments which are paid to that person from the special account.

61.—(1) Any payment of a sports award except to the extent that it has been made in respect of any one or more of the items specified in sub-paragraph (2).

(2) The items specified for the purposes of sub-paragraph (1) are food, ordinary clothing or footwear, household fuel or rent of the applicant or where the applicant is a member of a family, any other member of his family, or any council tax or water charges for which that applicant or member is liable.

(3) For the purposes of sub-paragraph (2) “food” does not include vitamins, minerals or other special dietary supplements intended to enhance the performance of the person in the sport in respect of which the award was made.

62. Where the amount of subsistence allowance paid to a person in a reduction week exceeds the amount of income-based jobseeker's allowance that person would have received in that reduction week had it been payable to him, less 50p, that excess amount.

63. In the case of an applicant participating in an employment zone programme, any discretionary payment made by an employment zone contractor to the applicant, being a fee, grant, loan or otherwise.

64. Any discretionary housing payment paid pursuant to regulation 2(1) of the Discretionary Financial Assistance Regulations 2001(204).

65.–(1) Any payment made by a local authority or by the Welsh Ministers, to or on behalf of the applicant or his partner relating to a service which is provided to develop or sustain the capacity of the applicant or his partner to live independently in his accommodation.

(2) For the purposes of sub-paragraph (1) "local authority" includes, in England, a county council.

66. Any payment of child benefit.

67. Any payment made under the Energy Rebate Scheme 2022 is to be disregarded in determining:
(a) an applicant's entitlement to a reduction under the scheme; or
(b) the amount of any reduction to which the applicant is entitled.

"The Energy Rebate Scheme 2022" means the scheme to provide financial support in respect of energy bills which was announced in Parliament by the Chancellor of the Exchequer on 3rd February 2022

68. Provision for all applicants: Homes for Ukraine scheme

(1) Any payment made in connection with the Homes for Ukraine scheme is to be disregarded in determining–

(a) an applicant's entitlement to a reduction under the scheme; or

(b) the amount of any reduction to which the applicant is entitled.

(2) In this regulation–

"the Homes for Ukraine scheme" means the Homes for Ukraine sponsorship scheme which was announced in Parliament by the Secretary of State for Levelling Up, Housing and Communities on 14th March 2022

SCHEDULE 8 Capital disregards: pensioners
Paragraph 63

PART 1 Capital to be disregarded.

1. Any premises acquired for occupation by the applicant which he intends to occupy as his home within 26 weeks of the date of acquisition or such longer period as is reasonable in the circumstances to enable the applicant to obtain possession and commence occupation of the premises.
2. Any premises which the applicant intends to occupy as his home, and in respect of which he is taking steps to obtain possession and has sought legal advice, or has commenced legal proceedings, with a view to obtaining possession, for a period of 26 weeks from the date on which he first sought such advice or first commenced such proceedings whichever is the earlier, or such longer period as is reasonable in the circumstances to enable him to obtain possession and commence occupation of those premises.
3. Any premises which the applicant intends to occupy as his home to which essential repairs or alterations are required in order to render them fit for such occupation, for a period of 26 weeks from the date on which the applicant first takes steps to effect those repairs or alterations, or such longer period as is necessary to enable those repairs or alterations to be carried out.
4. Any premises occupied in whole or in part—
 - (a) by a person who is a relative of the applicant or his partner as his home where that person has attained the qualifying age for state pension credit or is incapacitated;
 - (b) by the former partner of the applicant as his home; but this provision shall not apply where the former partner is a person from whom the applicant is estranged or divorced or with whom he had formed a civil partnership that has been dissolved.
5. Any future interest in property of any kind, other than land or premises in respect of which the applicant has granted a subsisting lease or tenancy, including sub-leases or sub-tenancies.
6. Where an applicant has ceased to occupy what was formerly the dwelling occupied as the home following his estrangement or divorce from his former partner or the dissolution of a civil partnership with his former partner, that dwelling for a period of 26 weeks from the date on which he ceased to occupy that dwelling or, where the dwelling is occupied as the home by the former partner who is a lone parent, for so long as it is so occupied.
7. Any premises where the applicant is taking reasonable steps to dispose of the whole of his interest in those premises, for a period of 26 weeks from the date on which he first took such steps, or such longer period as is reasonable in the circumstances to enable him to dispose of those premises.
8. All personal possessions.
9. The assets of any business owned in whole or in part by the applicant and for the purposes of which he is engaged as a self-employed earner or, if he has ceased to be so engaged, for such period as may be reasonable in the circumstances to allow for disposal of those assets.
10. The assets of any business owned in whole or in part by the applicant if—
 - (a) he is not engaged as a self-employed earner in that business by reason of some disease or bodily or mental disablement; but
 - (b) he intends to become engaged (or, as the case may be, re-engaged) as a self-employed earner in that business as soon as he recovers or is able to become engaged, or reengaged, in that business,
for a period of 26 weeks from the date on which the application for a reduction under this scheme is made or, if it is unreasonable to expect him to become engaged or re-engaged in that business within that period, for such longer period as is reasonable in the circumstances to enable him to become so engaged or re-engaged.
11. The surrender value of any policy of life insurance.
12. The value of any funeral plan contract; and for this purpose, “funeral plan contract” means a contract under which—
 - (a) the applicant makes one or more payments to another person (“the provider”);

- (b) the provider undertakes to provide, or secure the provision of, a funeral in the United Kingdom for the applicant on his death; and
- (c) the sole purpose of the plan is to provide or secure the provision of a funeral for the applicant on his death.

13. Where an ex-gratia payment has been made by the Secretary of State on or after 1st February 2001 in consequence of the imprisonment or internment of—

- (a) the applicant;
- (b) the applicant's partner;
- (c) the applicant's deceased spouse or deceased civil partner; or
- (d) the applicant's partner's deceased spouse or deceased civil partner, by the Japanese during the Second World War, an amount equal to that payment.

14.—(1) Subject to sub-paragraph (2), the amount of any trust payment made to an applicant or an applicant's partner who is—

- (a) a diagnosed person;
- (b) a diagnosed person's partner or was a diagnosed person's partner at the time of the diagnosed person's death; or
- (c) a parent of a diagnosed person, a person acting in place of the diagnosed person's parents or a person who was so acting at the date of the diagnosed person's death.

(2) Where a trust payment is made to—

- (a) a person referred to in sub-paragraph (1)(a) or (b), that sub-paragraph shall apply for the period beginning on the date on which the trust payment is made and ending on the date on which that person dies;
- (b) a person referred to in sub-paragraph (1)(c), that sub-paragraph shall apply for the period beginning on the date on which the trust payment is made and ending two years after that date.

(3) Subject to sub-paragraph (4), the amount of any payment by a person to whom a trust payment has been made or of any payment out of the estate of a person to whom a trust payment has been made, which is made to an applicant or an applicant's partner who is—

- (a) the diagnosed person;
- (b) a diagnosed person's partner or was a diagnosed person's partner at the date of the diagnosed person's death; or
- (c) a parent of a diagnosed person, a person acting in place of the diagnosed person's parents or a person who was so acting at the date of the diagnosed person's death.

(4) Where a payment such as referred to in sub-paragraph (3) is made to—

- (a) a person referred to in sub-paragraph (3)(a) or (b), that sub-paragraph shall apply for the period beginning on the date on which the payment is made and ending on the date on which that person dies;
- (b) a person referred to in sub-paragraph (3)(c), that sub-paragraph shall apply for the period beginning on the date on which the payment is made and ending two years after that date.

(5) In this paragraph, a reference to a person—

- (a) being the diagnosed person's partner;
- (b) acting in place of the diagnosed person's parents, at the date of the diagnosed person's death shall include a person who would have been such a person or a person who would have been so acting, but for the diagnosed person residing in a care home or an independent hospital.

(6) In this paragraph—

“diagnosed person” means a person who has been diagnosed as suffering from, or who, after his death, has been diagnosed as having suffered from, variant Creutzfeldt-Jakob disease;

“relevant trust” means a trust established out of funds provided by the Secretary of State in respect of persons who suffered, or who are suffering, from variant Creutzfeldt-Jakob disease for the benefit of persons eligible for payments in accordance with its provisions;

“trust payment” means a payment under a relevant trust.

15. The amount of any payment, other than a war pension, to compensate for the fact that the applicant, the applicant's partner, the applicant's deceased spouse or civil partner or the applicant's partner's deceased spouse or civil partner—

- (a) was a slave labourer or a forced labourer;

- (b) had suffered property loss or had suffered personal injury; or
- (c) was a parent of a child who had died, during the Second World War.

16.— Any payment made under or by—

(a) the Macfarlane Trust, the Macfarlane (Special Payments) Trust, the Macfarlane (Special Payments) (No. 2) Trust, the Fund, the Eileen Trust, MFET Limited, the Skipton Fund, the Caxton Foundation, “the Scottish Infected Blood Support Scheme, an approved blood scheme, the London Emergencies Trust, the We Love Manchester Emergency Fund, the Grenfell Tower charitable funds, the Grenfell Tower Residents’ Discretionary Fund, the Windrush Compensation Scheme, the Victims of Overseas Terrorism Compensation Scheme or the London Bombings Relief Charitable Fund (collectively referred to in this paragraph as “the Trusts”); or

(aa) a Grenfell Tower support payment;

(b) the Independent Living Fund (2006);

(c) Any historical child abuse payment ;

(d) Any Windrush payment;

(e) Any Post Office compensation payment;

(f) Any vaccine damage payment;

(g) Any payment out of the estate of a person, which derives from a payment to meet the recommendation of the Infected Blood Inquiry in its interim report published on 29th July 2022 made under or by the Scottish Infected Blood Support Scheme or an approved blood support scheme to the estate of the person, where the payment is made to the person’s son, daughter, step-son, or step-daughter.

(2) Any payment by or on behalf of a person who is suffering or who suffered from haemophilia or who is or was a qualifying person, which derives from a payment made under or by any of the Trusts or from a Grenfell Tower support payment, a historical child abuse payment or a Windrush payment and which is made to or for the benefit of that person's partner or former partner—

- (a) from whom he is not, or where that person has died was not, estranged or divorced, or
- (b) with whom he has formed a civil partnership that has not been dissolved or, where that person has died, had not been dissolved at the time of that person's death.

(3) Any payment by or on behalf of the partner or former partner of a person who is suffering or who suffered from haemophilia or who is or was a qualifying person which derives from a payment made under or by any of the Trusts or from a Grenfell Tower support payment, a historical child abuse payment or a Windrush payment, a Post Office compensation payment or a vaccine damage payment and which is made to or for the benefit of the person who is suffering from haemophilia or who is a qualifying person.

(4) Sub-paragraph (3) does not apply if—

- (a) the partner or former partner and that person are not, or if either of them has died were not, estranged or divorced, or
- (b) where the partner or former partner and that person have formed a civil partnership, the civil partnership has not been dissolved or, if either of them has died, had not been dissolved at the time of the death.

(5) Any payment by a person who is suffering from haemophilia or who is a qualifying person, which derives from a payment under or by any of the Trusts or from a Grenfell Tower support payment, a historical child abuse payment or a Windrush payment, a Post Office compensation payment, or a vaccine damage payment where—

- (a) that person has no partner or former partner from whom he is not estranged or divorced or with whom he has formed a civil partnership that has not been dissolved, nor any child who is or had been a member of that person's household; and
- (b) the payment is made either—
 - (i) to that person's parent or step-parent; or
 - (ii) where that person at the date of the payment is a child or a student who has not completed his full-time education and has no parent or step-parent, to any person standing in the place of his parent, but only for a period from the date of the payment until the end of two years from that person's death.

(6) Any payment out of the estate of a person who suffered from haemophilia or who was a qualifying person, which derives from a payment under or by any of the Trusts or from a

Grenfell Tower support payment, a historical child abuse payment or a Windrush payment, a Post Office compensation payment, or a vaccine damage payment, where—

(a) that person at the date of his death (“the relevant date”) had no partner or former partner from whom he was not estranged or divorced or with whom he had formed a civil partnership that had not been dissolved, nor any child who was or had been a member of his household; and

(b) the payment is made either—

(i) to that person's parent or step-parent; or

(ii) where that person at the relevant date was a child or a student who had not completed his full-time education and had no parent or step-parent, to any person standing in place of his parent, but only for a period of two years from the relevant date.

(7) In the case of a person to whom or for whose benefit a payment referred to in this paragraph is made, any capital resource which derives from—

(a) any payment of income or capital made under or deriving from any of the Trusts; or

(b) a Grenfell Tower support payment, a historical child abuse payment or a Windrush payment, a Post Office compensation payment, or a vaccine damage payment.

16A- Any payment made under, or by, a trust which is approved by the Secretary of State and which is established for the purpose of giving relief and assistance to a disabled person whose disabilities were caused by their mother having taken a preparation containing the drug known as Thalidomide during her pregnancy.

16B Any payment made by the Child Migrants Trust (registered charity number 1171479) under the scheme for former British child migrants;

17.—(1) An amount equal to the amount of any payment made in consequence of any personal injury to the applicant or, if the applicant has a partner, to the partner.

(2) Where the whole or part of the payment is administered—

(a) by the High Court or the County Court under Rule 21.11(1) of the Civil Procedure Rules 1998, or the Court of Protection, or on behalf of a person where the payment can only be disposed of by order or direction of any such court;

(b) in accordance with an order made under Rule 36.14 of the Ordinary Cause Rules 1993 or under Rule 128 of those Rules; or

(c) in accordance with the terms of a trust established for the benefit of the applicant or his partner,

the whole of the amount so administered.

18. Any amount specified in paragraph 19, 20, 21 or 25 of this Schedule for a period of one year beginning with the date of receipt.

19. Amounts paid under a policy of insurance in connection with the loss of or damage to the property occupied by the applicant as his home and to his personal possessions.

20. So much of any amounts paid to the applicant or deposited in the applicant's name for the sole purpose of—

(a) purchasing premises which the applicant intends to occupy as his home; or

(b) effecting essential repairs or alterations to the premises occupied or intended to be occupied by the applicant as his home.

21.—(1) Subject to paragraph 22 any amount paid—

(a) by way of arrears of benefit;

(b) by way of compensation for the late payment of benefit;

(c) in lieu of the payment of benefit;

(d) to rectify, or compensate for, an official error, as defined for the purposes of paragraph 22, being an amount to which that paragraph does not apply;

(e) by a local authority out of funds provided under either section 93 of the Local Government Act 2000 under a scheme known as “Supporting People” or section 91 of the Housing (Scotland) Act 2001.

(f) by way of occasional assistance including arrears and payments in lieu of occasional assistance (and in this paragraph “occasional assistance” has the same meaning as in paragraph 16 of Schedule 1);

(g) to rectify, or compensate for, an error made by an officer of the Department for Work and Pensions which was not caused or materially contributed to by any person outside the Department and which prevented or delayed an assessment of the applicant’s entitlement to contributory employment and support allowance, being an amount to which paragraph 22(1A) does not apply

(2) In sub-paragraph (1), “benefit” means—

(a) attendance allowance under section 64 of the Act;

(b) disability living allowance;

(c) personal independence payment;

(d) income support;

(e) income-based jobseeker’s allowance;

(f) state pension credit;

(g) housing benefit;

(h) council tax benefit;

(i) child tax credit;

(j) an increase of a disablement pension under section 104 of the SSCBA (increase where constant attendance is needed), and any further increase of such a pension under section 105 of the Act (increase for exceptionally severe disablement);

(k) any amount included on account of the applicant’s exceptionally severe disablement or need for constant attendance in a war disablement pension or a war widow’s or widower’s pension;

(l) any discretionary housing payment paid pursuant to regulation 2(1) of the Discretionary Financial Assistance Regulations 2001;

(m) working tax credit;

(n) income-related employment and support allowance,

(o) social fund payments under Part 8 of the SSCBA,

(p) universal credit,

(q) maternity allowance under section 35 of the SSCBA (state maternity allowance for employed or self-employed earner);

(r) early years assistance given in accordance with section 32 of the Social Security (Scotland) Act 2018;

(s) funeral expense assistance given in accordance with section 34 of that Act;

(t) any Scottish child payment assistance given in accordance with section 79 of that Act;

(u) any assistance given in accordance with the Carer’s Assistance (Young Carer Grants) (Scotland) Regulations 2019;

(v) short-term assistance given in accordance with regulations under section 36 of the Social Security (Scotland) Act 2018;

(w) winter heating assistance given in accordance with regulations under section 30 of that Act; or

(x) bereavement support payment under section 30 of the Pensions Act 2014

(3) In sub-paragraph (1) “contributory employment and support allowance” means an allowance under Part 1 of the Welfare Reform Act 2007 as amended by the provisions of Schedule 3, and Part 1 of Schedule 14, to the Welfare Reform Act 2012 that remove references to an income-related allowance

22.—(1) Subject to sub-paragraph (3), any payment of £5,000 or more which has been made to rectify, or to compensate for, an official error or an error on a point in law relating to a relevant benefit and which has been received by the applicant in full on or after the day on which he became entitled to benefit under the Council Tax Benefit Regulations 2006 or the Council Tax Benefit (Persons who have attained the qualifying age for state pension credit) Regulations 2006.

(1A) Subject to paragraph (3), any payment of £5,000 or more received by the applicant in full on or after the day on which the applicant became entitled to a reduction under an authority’s scheme which has been made to rectify, or compensate for, an error made by an officer of the Department for Work and Pensions which was not caused or materially contributed to by any person outside the Department and which prevented or delayed an assessment of the applicant’s entitlement to contributory employment and support allowance.

(1B) In sub-paragraph (1A) “contributory employment and support allowance” has the meaning in paragraph 21(3)

(2) Subject to sub-paragraph (3), the total amount of any payments disregarded under—
(a) paragraph 7(2) of Schedule 10 to the Income Support (General) Regulations 1987;
(b) paragraph 12(2) of Schedule 8 to the Jobseeker’s Allowance Regulations 1996;
(c) paragraph 9(2) of Schedule 5 to the Council Tax Benefit Regulations 2006;
(d) paragraph 20A of Schedule 5 to the State Pension Credit Regulations 2002,
(e) paragraph 11(2) of Schedule 9 to the Employment and Support Allowance Regulations 2008,

where the award in respect of which the payments last fell to be disregarded under those Regulations either terminated immediately before the relevant date or is still in existence at that date.

(f) regulations 10A to 10C of the Universal Credit (Transitional Provisions) Regulations 2014

(3) Any disregard which applies under sub-paragraph (1) (1A) or (2) shall have effect until the award comes to an end.

(4) In this paragraph—

“the award”, except in sub-paragraph (2), means—

(a) the award of benefit under the Council Tax Benefit (Persons who have attained the qualifying age for state pension credit) Regulations 2006 during which the relevant sum or, where it is paid in more than one instalment, the first instalment of that sum is received; and

(b) where that award is followed by one or more further awards which, or each of which, begins immediately after the previous award ends, such further awards until the end of the last such award, provided that, for such further awards, the applicant—

(i) is the person who received the relevant sum;

(ii) is the partner of that person; or

(iii) was the partner of that person at the date of his death;

“official error”—

(a) where the error relates to housing benefit, or council tax benefit (in respect of any period before 1st April 2013), has the meaning given by regulation 1(2) of the Housing Benefit and Council Tax Benefit (Decisions and Appeals) Regulations 2001; and

(b) where the error relates to any other relevant benefit, has the meaning given by regulation 1(3) of the Social Security and Child Support (Decisions and Appeals) Regulations 1999;

“the relevant date” means—

(a) in the case of an existing award of benefit under these Regulations or the Council Tax Benefit Regulations 2006, 6th October 2003; and

(b) in any other case, the date on which the claim for benefit under these Regulations or the Council Tax Benefit Regulations 2006 was made;

“the relevant sum” means the total amount referred to in sub-paragraph (1).

22A. Any payment of a widowed parent’s allowance made pursuant to section 39A of the SSCBA (widowed parent’s allowance)—

(a) to the survivor of a cohabiting partnership (within the meaning in section 39A(7) of the SSCBA) who is entitled to a widowed parent’s allowance for a period before 9th February 2023(2), and

(b) in respect of any period of time during the period ending with the day before the survivor makes the claim for a widowed parent’s allowance,

but only for a period of 52 weeks beginning with the date of receipt of the payment or 1st April 2024, whichever is later.

22B.—(1) A payment of bereavement support payment in respect of the rate set out in regulation 3(2) or (5) of the Bereavement Support Payment Regulations 2017 (rate of bereavement support payment), but only for the period of 52 weeks from the date of receipt of the payment.

(2) Where bereavement support payment under section 30 of the Pensions Act 2014 is paid to the survivor of a cohabiting partnership (within the meaning of section 30(6B) of that Act) in respect of a death occurring before 9th February 2023, any amount of that payment which is—

(a) in respect of the rate set out in regulation 3(1) of the Bereavement Support Payment Regulations 2017, and

(b) paid as a lump sum for more than one monthly recurrence of the day of the month on which their cohabiting partner died, but only for a period of 52 weeks beginning with the date of receipt of the payment or 1st April 2024, whichever is later.

23. Where a capital asset is held in a currency other than Sterling, any banking charge or commission payable in converting that capital into Sterling.

24. The value of the right to receive income from an occupational pension scheme or a personal pension scheme.

25. Any arrears of supplementary pension which is disregarded under paragraph 4 of Schedule 6 (amounts to be disregarded in the calculation of income other than earnings) or of any amount which is disregarded under paragraph 5 or 6 of that Schedule.

26. The dwelling occupied as the home; but only one dwelling shall be disregarded under this paragraph.

27.—(1) Subject to sub-paragraph (2), where an applicant falls within class C (alternative maximum council tax reduction: pensioners), the whole of his capital.

(2) Sub-paragraph (1) does not apply where an applicant falls within class B and class C.

28. Where a person elects to be entitled to a lump sum under Schedule 5 or 5A to SSCBA or under Schedule 1 to the Social Security (Graduated Retirement Benefit) Regulations 2005, or is treated as having made such an election, and a payment has been made pursuant to that election, an amount equal to—

(a) except where sub-paragraph (b) applies, the amount of any payment or payments made on account of that lump sum;

(b) the amount of that lump sum, but only for so long as that person does not change that election in favour of an increase of pension or benefit.

29. - Any payments made by virtue of regulations made under—

(a) section 57 of the Health and Social Care Act 2001 (direct payments);

(b) section 12B of the Social Work (Scotland) Act 1968 (direct payments in respect of community care services);

(c) sections 12A to 12C of the National Health Service Act 2006 (direct payments for health care);

(d) Article 15 of the Health and Personal Social Services (Northern Ireland) Order 1972 (general social welfare);

(e) section 8 of the Carers and Direct Payments Act (Northern Ireland) 2002 (direct payments);

or

(f) by virtue of regulations made under section 50 or 52 of the Social Services and Well-being (Wales) Act 2014 (direct payments)

29A.

(1) Any payment made by a local authority in accordance with section 26A of the Children (Scotland) Act 1995 (duty to provide continuing care)(a).

(2) Any payment or part of a payment made by a local authority in accordance with that section to a person (“A”) which A passes on to the applicant where A—

(a) was formerly in the applicant’s care;

(b) is aged 16 or over; and

(c) continues to live with the applicant.”.

29B. A payment made under the Age-Related payments regulations 2013.

29C Any payments to an applicant made under section 49 of the Children and Families Act 2014 (a) (personal budgets and direct payments)

29D. Any lump sum payment made in accordance with regulation 24 of the Victims’ Payments Regulations 2020.

29E. Any sum paid by means of assistance in accordance with the Carer’s Assistance (Young Carer Grants) (Scotland) Regulations 2019.

29F. Any sum paid by means of winter heating assistance in accordance with regulations under section 30 of the Social Security (Scotland) Act 2018

29G Provision for all applicants: Homes for Ukraine scheme

(1) Any payment made in connection with the Homes for Ukraine scheme is to be disregarded in determining—

- (a) an applicant's entitlement to a reduction under the scheme; or
- (b) the amount of any reduction to which the applicant is entitled.

(2) In this regulation—

“the Homes for Ukraine scheme” means the Homes for Ukraine sponsorship scheme which was announced in Parliament by the Secretary of State for Levelling Up, Housing and Communities on 14th March 2022

PART 2 - Capital disregarded only for the purposes of determining deemed income.

30. The value of the right to receive any income under a life interest or from a life rent.

31. The value of the right to receive any rent except where the applicant has a reversionary interest in the property in respect of which rent is due.

32. The value of the right to receive any income under an annuity or the surrender value (if any) of such an annuity.

33. Where property is held under a trust, other than—

- (a) a charitable trust within the meaning of the Charities Act 1993; or
- (b) a trust set up with any payment to which paragraph 16 of this Schedule applies, and under the terms of the trust, payments fall to be made, or the trustees have a discretion to make payments, to or for the benefit of the applicant or the applicant's partner, or both, that property.

34. Any payment made under the Energy Rebate Scheme 2022 is to be disregarded in determining:

- (a) an applicant's entitlement to a reduction under the scheme; or
- (b) the amount of any reduction to which the applicant is entitled.

“The Energy Rebate Scheme 2022” means the scheme to provide financial support in respect of energy bills which was announced in Parliament by the Chancellor of the Exchequer on 3rd February 2022

SCHEDULE 9 Capital disregards: persons who are not pensioners.

Paragraph 63

1. Any payment made to the applicant in respect of any child care, travel or other expenses incurred, or to be incurred, by him in respect of his participation in the Work for Your Benefit Scheme but only for 52 weeks beginning with the date of receipt of the payment.
2. Any payment made to the applicant in respect of any travel or other expenses incurred, or to be incurred, by him in respect of his participation in the Mandatory Work Activity Scheme but only for 52 weeks beginning with the date of receipt of the payment.
3. Any payment made to the applicant in respect of any travel or other expenses incurred, or to be incurred, by him in respect of his participation in the Employment, Skills and Enterprise Scheme but only for 52 weeks beginning with the date of receipt of the payment.
4. The dwelling together with any garage, garden, and outbuildings, normally occupied by the applicant as his home including any premises not so occupied which it is impracticable or unreasonable to sell separately, but, notwithstanding paragraph 33 (calculation of income and capital of members of applicant's family and of a polygamous marriage), only one dwelling is to be disregarded under this paragraph.
5. Any premises acquired for occupation by the applicant which he intends to occupy as his home within 26 weeks of the date of acquisition or such longer period as is reasonable in the circumstances to enable the applicant to obtain possession and commence occupation of the premises.
6. Any sum directly attributable to the proceeds of sale of any premises formerly occupied by the applicant as his home which is to be used for the purchase of other premises intended for such occupation within 26 weeks of the date of sale or such longer period as is reasonable in the circumstances to enable the applicant to complete the purchase.
7. Any premises occupied in whole or in part—
 - (a) by a partner or relative of a single applicant or any member of the family as his home where that person has attained the qualifying age for state pension credit or is incapacitated;
 - (b) by the former partner of the applicant as his home; but this provision does not apply where the former partner is a person from whom the applicant is estranged or divorced or with whom he had formed a civil partnership that has been dissolved.
8. Where an applicant is on income support, an income-based jobseeker's allowance or an income-related employment and support allowance, the whole of his capital.
9. Where the applicant is a member of a joint-claim couple for the purposes of the Jobseekers Act 1995 and his partner is on income-based jobseeker's allowance, the whole of the applicant's capital.
10. Any future interest in property of any kind, other than land or premises in respect of which the applicant has granted a subsisting lease or tenancy, including sub-leases or sub-tenancies.
- 11.—(1) The assets of any business owned in whole or in part by the applicant and for the purposes of which he is engaged as a self-employed earner, or if he has ceased to be so engaged, for such period as may be reasonable in the circumstances to allow for disposal of any such asset.
 - (2) The assets of any business owned in whole or in part by the applicant where—
 - (a) he is not engaged as a self-employed earner in that business by reason of some disease or bodily or mental disablement; but
 - (b) he intends to become engaged or, as the case may be, re-engaged as a self-employed earner in that business as soon as he recovers or is able to become engaged or re-engaged in that business,
for a period of 26 weeks from the date on which the application for a reduction under this scheme is made, or is treated as made, or, if it is unreasonable to expect him to become engaged or re-engaged in that business within that period, for such longer period as is reasonable in the circumstances to enable him to become so engaged or re-engaged.
 - (3) In the case of a person who is receiving assistance under the self-employment route, the assets acquired by that person for the purpose of establishing or carrying on the commercial activity in respect of which such assistance is being received.

(4) In the case of a person who has ceased carrying on the commercial activity in respect of which assistance was received as specified in sub-paragraph (3), the assets relating to that activity for such period as may be reasonable in the circumstances to allow for disposal of any such asset.

12.—(1) Subject to sub-paragraph (2), any arrears of, or any concessionary payment made to compensate for arrears due to the non-payment of—

- (a) any payment specified in paragraphs 11, 13 or 14 of Schedule 8;
 - (b) an income-related benefit under Part 7 of the SSCBA;
 - (c) an income-based jobseeker's allowance;
 - (d) any discretionary housing payment paid pursuant to regulation 2(1) of the Discretionary Financial Assistance Regulations 2001;
 - (e) working tax credit and child tax credit;
 - (f) an income-related employment and support allowance,
- but only for a period of 52 weeks from the date of the receipt of arrears or of the concessionary payment.

(2) In a case where the total of any arrears and, if appropriate, any concessionary payment referred to in sub-paragraph (1) relating to one of the specified payments, benefits or allowances amounts to £5,000 or more (referred to in this sub-paragraph and in sub-paragraph (3) as “the relevant sum”) and is—

- (a) paid in order to rectify or to compensate for, an official error as defined in regulation 1(2) of the Housing Benefit and Council Tax Benefit (Decisions and Appeals) Regulations 2001; and
 - (b) received by the applicant in full on or after 14th October 2001,
- sub-paragraph (1) has effect in relation to such arrears or concessionary payment either for a period of 52 weeks from the date of receipt, or, if the relevant sum is received in its entirety during the period of an award of a reduction under this scheme, for the remainder of that period if that is a longer period.

(3) For the purposes of sub-paragraph (2), “the period of an award of a reduction under this scheme” means—

- (a) the award in which the relevant sum is first received (or the first part thereof where it is paid in more than one instalment); and
- (b) where that award is followed by one or more further awards which, or each of which, begins immediately after the end of the previous award, such further award provided that for that further award the applicant—
 - (i) is the person who received the relevant sum; or
 - (ii) is the partner of the person who received the relevant sum or was that person's partner at the date of his death.

13. Any sum—

- (a) paid to the applicant in consequence of damage to, or loss of the home or any personal possession and intended for its repair or replacement; or
- (b) acquired by the applicant (whether as a loan or otherwise) on the express condition that it is to be used for effecting essential repairs or improvement to the home, which is to be used for the intended purpose, for a period of 26 weeks from the date on which it was so paid or acquired or such longer period as is reasonable in the circumstances to effect the repairs, replacement, or improvement.

14. Any sum—

- (a) deposited with a housing association as defined in section 1(1) of the Housing Associations Act 1985 as a condition of occupying the home;
- (b) which was so deposited and which is to be used for the purchase of another home, for the period of 26 weeks or such longer period as may be reasonable in the circumstances to enable the applicant to complete the purchase.

15. Any personal possessions except those which have been acquired by the applicant with the intention of reducing his capital in order to secure entitlement to a reduction under this scheme or to increase the amount of that reduction.

16. The value of the right to receive any income under an annuity or the surrender value (if any) of such an annuity.

17. Where the funds of a trust are derived from a payment made in consequence of any personal injury to the applicant or applicant's partner, the value of the trust fund and the value of the right to receive any payment under that trust.

18.–(1) Any payment made to the applicant or the applicant’s partner in consequence of any personal injury to the applicant or, as the case may be, the applicant’s partner.

(2) But sub-paragraph (1)–

- (a) applies only for the period of 52 weeks beginning with the day on which the applicant first receives any payment in consequence of that personal injury;
- (b) does not apply to any subsequent payment made to him in consequence of that injury (whether it is made by the same person or another);
- (c) ceases to apply to the payment or any part of the payment from the day on which the applicant no longer possesses it;
- (d) does not apply to any payment from a trust where the funds of the trust are derived from a payment made in consequence of any personal injury to the applicant.

(3) For the purposes of sub-paragraph (2)(c), the circumstances in which an applicant no longer possesses a payment or a part of it include where the applicant has used a payment or part of it to purchase an asset.

(4) References in sub-paragraphs (2) and (3) to the applicant are to be construed as including references to his partner (where applicable).

19. The value of the right to receive any income under a life interest or from a life rent.

20. The value of the right to receive any income which is disregarded under paragraph 15 of Schedule 7 or paragraph 29 of Schedule 8.

21. The surrender value of any policy of life insurance.

22. Where any payment of capital falls to be made by instalments, the value of the right to receive any outstanding instalments.

23. Any payment made by a local authority in accordance with section 17, 23B, 23C or 24A of the Children Act 1989 or, as the case may be, section 12 of the Social Work (Scotland) Act 1968 or sections 22, 29 or 30 of the Children (Scotland) Act 1995 (provision of services for children and their families and advice and assistance to certain children).

24.–(1) Subject to sub-paragraph (2), any payment (or part of a payment) made by a local authority in accordance with section 23C of the Children Act 1989 or section 29 of the Children (Scotland) Act 1995 (local authorities’ duty to promote welfare of children and powers to grant financial assistance to persons in, or formerly in, their care) to a person (“A”) which A passes on to the applicant.

(2) Sub-paragraph (1) applies only where A–

1. was formerly in the applicant’s care, and
2. is aged 18 or over, and
3. continues to live with the applicant.

25. Any–

- (a) social fund payment made pursuant to Part 8 of the SSCBA (the social fund); or
- (b) occasional assistance.

26. Any refund of tax which falls to be deducted under section 369 of the Income and Corporation Taxes Act 1988 (deduction of tax from certain loan interest) on a payment of relevant loan interest for the purpose of acquiring an interest in the home or carrying out repairs or improvements to the home.

27. Any capital which by virtue of paragraph 55 or 81 (capital treated as income: persons who are not pensioners, treatment of student loans) is to be treated as income.

28. Where any payment of capital is made in a currency other than sterling, any banking charge or commission payable in converting that payment into sterling.

29.–(1) Any payment made under or by the Trusts, the Fund, the Eileen Trust, MFET Limited, the Independent Living Fund (2006), the Skipton Fund, the Caxton Foundation, or the London Bombings Relief Charitable Fund.

(2) Any payment by or on behalf of a person who is suffering or who suffered from haemophilia or who is or was a qualifying person, which derives from a payment made under or by any of the Trusts to which sub-paragraph (1) refers and which is made to or for the benefit of—

that person's partner or former partner from whom he is not, or where that person has died was not, estranged or divorced or with whom he has formed a civil partnership that has not been dissolved or, where that person has died, had not been dissolved at the time of that person's death;

any child who is a member of that person's family or who was such a member and who is a member of the applicant's family; or

any young person who is a member of that person's family or who was such a member and who is a member of the applicant's family.

(3) Any payment by or on behalf of the partner or former partner of a person who is suffering or who suffered from haemophilia or who is or was a qualifying person which derives from a payment made under or by any of the Trusts to which sub-paragraph (1) refers and which is made to or for the benefit of—

the person who is suffering from haemophilia or who is a qualifying person;

any child who is a member of that person's family or who was such a member and who is a member of the applicant's family; or

any young person who is a member of that person's family or who was such a member and who is a member of the applicant's family.

(4) Sub-paragraph (3) does not apply if—

the partner or former partner and that person are not, or if either of them has died were not, estranged or divorced, or

where the partner or former partner and that person have formed a civil partnership, the civil partnership has not been dissolved or, if either of them has died, had not been dissolved at the time of the death.

(5) Any payment by a person who is suffering from haemophilia or who is a qualifying person, which derives from a payment under or by any of the Trusts to which sub-paragraph (1) refers, where—

that person has no partner or former partner from whom he is not estranged or divorced or with whom he has formed a civil partnership that has not been dissolved, nor any child or young person who is or had been a member of that person's family; and

the payment is made either—

(i) to that person's parent or step-parent; or

(ii) where that person at the date of the payment is a child, a young person or a student who has not completed his full-time education and has no parent or step-parent, to his guardian, but only for a period from the date of the payment until the end of two years from that person's death.

(6) Any payment out of the estate of a person who suffered from haemophilia or who was a qualifying person, which derives from a payment under or by any of the Trusts to which sub-paragraph (1) refers, where—

that person at the date of his death (the relevant date) had no partner or former partner from whom he was not estranged or divorced or with whom he had formed a civil partnership that had not been dissolved, nor any child or young person who was or had been a member of his family; and

the payment is made either—

(i) to that person's parent or step-parent; or

(ii) where that person at the relevant date was a child, a young person or a student who had not completed his full-time education and had no parent or step-parent, to his guardian, but only for a period of two years from the relevant date.

(7) In the case of a person to whom or for whose benefit a payment referred to in this paragraph is made, any capital resource which derives from any payment of income or capital made under or deriving from any of the Trusts.

(8) For the purposes of sub-paragraphs (2) to (6), any reference to the Trusts is to be construed as including a reference to the Fund, the Eileen Trust, MFET Limited, the Skipton Fund, the Caxton Foundation, and the London Bombings Relief Charitable Fund.

30.—(1) Where an applicant has ceased to occupy what was formerly the dwelling occupied as the home following his estrangement or divorce from, or dissolution of his civil partnership with, his former partner, that dwelling for a period of 26 weeks from the date on which he ceased to occupy

that dwelling or, where the dwelling is occupied as the home by the former partner who is a lone parent, for so long as it is so occupied.

(2) In this paragraph “dwelling” includes any garage, garden, and outbuildings, which were formerly occupied by the applicant as his home and any premises not so occupied which it is impracticable or unreasonable to sell separately, in particular, in Scotland, any croft land on which the dwelling is situated.

31. Any premises where the applicant is taking reasonable steps to dispose of those premises, for a period of 26 weeks from the date on which he first took such steps, or such longer period as is reasonable in the circumstances to enable him to dispose of those premises.

32. Any premises which the applicant intends to occupy as his home, and in respect of which he is taking steps to obtain possession and has sought legal advice, or has commenced legal proceedings, with a view to obtaining possession, for a period of 26 weeks from the date on which he first sought such advice or first commenced such proceedings whichever is the earlier, or such longer period as is reasonable in the circumstances to enable him to obtain possession and commence occupation of those premises.

33. Any premises which the applicant intends to occupy as his home to which essential repairs or alterations are required in order to render them fit for such occupation, for a period of 26 weeks from the date on which the applicant first takes steps to effect those repairs or alterations, or such longer period as is necessary to enable those repairs or alterations to be carried out.

34. Any payment made by the Secretary of State to compensate for the loss (in whole or in part) of entitlement to housing benefit.

35. The value of the right to receive an occupational or personal pension.

36. The value of any funds held under a personal pension scheme.

37. The value of the right to receive any rent except where the applicant has a reversionary interest in the property in respect of which rent is due.

38. Any payment in kind made by a charity or under or by the Trusts, the Fund, MFET Limited, the Skipton Fund, the Caxton Foundation, or the Independent Living Fund (2006).

39. Any payment made pursuant to section 2 of the Employment and Training Act 1973 or section 2 of the Enterprise and New Towns (Scotland) Act 1990, but only for the period of 52 weeks beginning on the date of receipt of the payment.

40. Any payment in consequence of a reduction of council tax under section 13 of the 1992 Act (reduction of liability for council tax), but only for a period of 52 weeks from the date of the receipt of the payment.

41. Any grant made in accordance with a scheme made under section 129 of the Housing Act 1988(209) or section 66 of the Housing (Scotland) Act 1988(210) (schemes for payments to assist local housing authority and local authority tenants to obtain other accommodation) which is to be used—
to purchase premises intended for occupation as his home; or
to carry out repairs or alterations which are required to render premises fit for occupation as his home,
for a period of 26 weeks from the date on which he received such a grant or such longer period as is reasonable in the circumstances to enable the purchase, repairs, or alterations to be completed and the applicant to commence occupation of those premises as his home.

42. Any arrears of supplementary pension which is disregarded under paragraph 54 of Schedule 8 (sums to be disregarded in the calculation of income other than earnings) or of any amount which is disregarded under paragraph 55 or 56 of that Schedule, but only for a period of 52 weeks from the date of receipt of the arrears.

43.—(1) Any payment or repayment made—
as respects England, under regulation 5, 6 or 12 of the National Health Service (Travel Expenses and Remission of Charges) Regulations 2003 (travelling expenses and health service supplies);

as respects Wales, under regulation 5, 6 or 11 of the National Health Service (Travelling Expenses and Remission of Charges) (Wales) Regulations 2007 (travelling expenses and health service supplies);

as respects Scotland, under regulation 3, 5 or 11 of the National Health Service (Travelling Expenses and Remission of Charges) (Scotland) (No. 2) Regulations 2003 (travelling expenses and health service supplies),

but only for a period of 52 weeks from the date of receipt of the payment or repayment.

(2) Any payment or repayment made by the Secretary of State for Health, the Scottish Ministers or the Welsh Ministers which is analogous to a payment or repayment mentioned in sub-paragraph (1), but only for a period of 52 weeks from the date of receipt of the payment or repayment.

44. Any payment made to such persons entitled to receive benefits as may be determined by or under a scheme made pursuant to section 13 of the Social Security Act 1988 in lieu of vouchers or similar arrangements in connection with the provision of those benefits (including payments made in place of healthy start vouchers, milk tokens or the supply of vitamins), but only for a period of 52 weeks from the date of receipt of the payment.

45. Any payment made under Part 8A of the SSCBA (entitlement to health in pregnancy grant).

46. Any payment made either by the Secretary of State for Justice or by Scottish Ministers under a scheme established to assist relatives and other persons to visit persons in custody, but only for a period of 52 weeks from the date of the receipt of the payment.

47. Any payment (other than a training allowance) made, whether by the Secretary of State or any other person, under the Disabled Persons (Employment) Act 1944(211) to assist disabled persons to obtain or retain employment despite their disability.

48. Any payment made by a local authority under section 3 of the Disabled Persons (Employment) Act 1958(212) to homeworkers assisted under the Blind Homeworkers' Scheme.

49.—(1) Subject to sub-paragraph (2), where an applicant falls within class F (alternative maximum council reduction: persons who are not pensioners), the whole of his capital.

(2) Sub-paragraph (1) does not apply where an applicant falls within class E and class F.

50.—(1) Any sum of capital to which sub-paragraph (2) applies and—
which is administered on behalf of a person by the High Court or the County Court under Rule 21.11(1) of the Civil Procedure Rules 1998 or by the Court of Protection;
which can only be disposed of by order or direction of any such court; or
where the person concerned is under the age of 18, which can only be disposed of by order or direction prior to that person attaining age 18.

(2) This sub-paragraph applies to a sum of capital which is derived from—
an award of damages for a personal injury to that person; or
compensation for the death of one or both parents where the person concerned is under the age of 18.

51. Any sum of capital administered on behalf of a person in accordance with an order made under section 13 of the Children (Scotland) Act 1995, or under Rule 36.14 of the Ordinary Cause Rules 1993 or under Rule 128 of those Rules, where such sum derives from—
award of damages for a personal injury to that person; or
compensation for the death of one or both parents where the person concerned is under the age of 18.

52. Any payment to the applicant as holder of the Victoria Cross or George Cross.

53. In the case of a person who is receiving, or who has received, assistance under the self-employment route, any sum of capital which is acquired by that person for the purpose of establishing or carrying on the commercial activity in respect of which such assistance is or was received but only for a period of 52 weeks from the date on which that sum was acquired.

54.—(1) Any payment of a sports award for a period of 26 weeks from the date of receipt of that payment except to the extent that it has been made in respect of any one or more of the items specified in sub-paragraph (2).

(2) The items specified for the purposes of sub-paragraph (1) are food, ordinary clothing or footwear, household fuel or rent of the applicant or, where the applicant is a member of a family, any other member of his family, or any council tax or water charges for which that applicant or member is liable.

(3) For the purposes of sub-paragraph (2) “food” does not include vitamins, minerals or other special dietary supplements intended to enhance the performance of the person in the sport in respect of which the award was made.

55.—(1) Any payment—

by way of an education maintenance allowance made pursuant to—

(i) regulations made under section 518 of the Education Act 1996;

(ii) regulations made under section 49 or 73(f) of the Education (Scotland) Act 1980;

(iii) directions made under section 73ZA of the Education (Scotland) Act 1980 and paid under section 12(2)(c) of the Further and Higher Education (Scotland) Act 1992;

) corresponding to such an education maintenance allowance, made pursuant to—

(i) section 14 or section 181 of the Education Act 2002 (power of Secretary of State and the Welsh Ministers to give financial assistance for purposes related to education or childcare, and allowances in respect of education or training); or

(ii) regulations made under section 181 of that Act; or

in England, by way of financial assistance made pursuant to section 14 of the Education Act 2002.

(2) Any payment, other than a payment to which sub-paragraph (1) applies, made pursuant to—

regulations made under section 518 of the Education Act 1996;

regulations made under section 49 of the Education (Scotland) Act 1980; or

directions made under section 73ZA of the Education (Scotland) Act 1980 and paid under section 12(2)(c) of the Further and Higher Education (Scotland) Act 1992,

in respect of a course of study attended by a child or a young person or a person who is in receipt of an education maintenance allowance or other payment made pursuant to any provision specified in sub-paragraph (1).

56. In the case of an applicant participating in an employment zone programme, any discretionary payment made by an employment zone contractor to the applicant, being a fee, grant, loan or otherwise, but only for the period of 52 weeks from the date of receipt of the payment.

57. Any arrears of subsistence allowance paid as a lump sum but only for the period of 52 weeks from the date of receipt of the payment.

58. Where an ex-gratia payment of £10,000 has been made by the Secretary of State on or after 1st February 2001 in consequence of the imprisonment or internment of—

the applicant;

the applicant’s partner;

the applicant’s deceased spouse or deceased civil partner; or

the applicant’s partner’s deceased spouse or deceased civil partner,

by the Japanese during the Second World War, £10,000.

59.—(1) Subject to sub-paragraph (2), the amount of any trust payment made to an applicant or a member of an applicant’s family who is—

a diagnosed person;

the diagnosed person’s partner or the person who was the diagnosed person’s partner at the date of the diagnosed person’s death;

a parent of a diagnosed person, a person acting in place of the diagnosed person’s parents or a person who was so acting at the date of the diagnosed person’s death; or

a member of the diagnosed person’s family (other than his partner) or a person who was a member of the diagnosed person’s family (other than his partner) at the date of the diagnosed person’s death.

(2) Where a trust payment is made to—

a person referred to in sub-paragraph (1)(a) or (b), that sub-paragraph applies for the period beginning on the date on which the trust payment is made and ending on the date on which that person dies;

a person referred to in sub-paragraph (1)(c), that sub-paragraph applies for the period beginning on the date on which the trust payment is made and ending two years after that date;

a person referred to in sub-paragraph (1)(d), that sub-paragraph applies for the period beginning on the date on which the trust payment is made and ending—

(i) two years after that date; or

(ii) on the day before the day on which that person—

(aa) ceases receiving full-time education; or

(bb) attains the age of 20, whichever is the latest.

(3) Subject to sub-paragraph (4), the amount of any payment by a person to whom a trust payment has been made or of any payment out of the estate of a person to whom a trust payment has been made, which is made to an applicant or a member of an applicant's family who is—

the diagnosed person's partner or the person who was the diagnosed person's partner at the date of the diagnosed person's death;

a parent of a diagnosed person, a person acting in place of the diagnosed person's parents or a person who was so acting at the date of the diagnosed person's death; or

a member of the diagnosed person's family (other than his partner) or a person who was a member of the diagnosed person's family (other than his partner) at the date of the diagnosed person's death,

but only to the extent that such payments do not exceed the total amount of any trust payments made to that person.

(4) Where a payment as referred to in sub-paragraph (3) is made to—

a person referred to in sub-paragraph (3)(a), that sub-paragraph applies for the period beginning on the date on which that payment is made and ending on the date on which that person dies;

a person referred to in sub-paragraph (3)(b), that sub-paragraph applies for the period beginning on the date on which that payment is made and ending two years after that date; or

person referred to in sub-paragraph (3)(c), that sub-paragraph applies for the period beginning on the date on which that payment is made and ending—

(i) two years after that date; or

(ii) on the day before the day on which that person—

(aa) ceases receiving full-time education; or

(bb) attains the age of 20,

whichever is the latest.

(5) In this paragraph, a reference to a person—

being the diagnosed person's partner;

being a member of a diagnosed person's family;

acting in place of the diagnosed person's parents,

at the date of the diagnosed person's death includes a person who would have been such a person or a person who would have been so acting, but for the diagnosed person residing in a care home, an Abbeyfield Home, or an independent hospital on that date.

(6) In this paragraph—

“diagnosed person” means a person who has been diagnosed as suffering from, or who, after his death, has been diagnosed as having suffered from, variant Creutzfeld-Jakob disease;

“relevant trust” means a trust established out of funds provided by the Secretary of State in respect of persons who suffered, or who are suffering, from variant Creutzfeld-Jakob disease for the benefit of persons eligible for payments in accordance with its provisions;

“trust payment” means a payment under a relevant trust.

60. The amount of any payment, other than a war pension, to compensate for the fact that the applicant, the applicant's partner, the applicant's deceased spouse or deceased civil partner or the applicant's partner's deceased spouse or deceased civil partner—

was a slave labourer or a forced labourer;

had suffered property loss or had suffered personal injury; or

was a parent of a child who had died,

during the Second World War.

61.—(1) Any payment made by a local authority, or by the Welsh Ministers, to or on behalf of the applicant or his partner relating to a service which is provided to develop or sustain the capacity of the applicant or his partner to live independently in his accommodation.

(2) For the purposes of sub-paragraph (1) “local authority” includes in England a county council.

62. Any payment made under regulations made under section 57 of the Health and Social Care Act 2001 or under section 12B of the Social Work (Scotland) Act 1968, or under sections 12A to 12D of the National Health Service Act 2006 (direct payments for health care).

63. Any payment made to the applicant pursuant to regulations under section 2(6)(b), 3 or 4 of the Adoption and Children Act 2002.

64. Any payment made to the applicant in accordance with regulations made pursuant to section 14F of the Children Act 1989 (special guardianship support services).

65. Any payment made under the Energy Rebate Scheme 2022 is to be disregarded in determining:

(a) an applicant’s entitlement to a reduction under the scheme; or

(b) the amount of any reduction to which the applicant is entitled.

“The Energy Rebate Scheme 2022” means the scheme to provide financial support in respect of energy bills which was announced in Parliament by the Chancellor of the Exchequer on 3rd February 2022

66. Provision for all applicants: Homes for Ukraine scheme

(1) Any payment made in connection with the Homes for Ukraine scheme is to be disregarded in determining—

(a) an applicant’s entitlement to a reduction under the scheme; or

(b) the amount of any reduction to which the applicant is entitled.

(2) In this regulation—

“the Homes for Ukraine scheme” means the Homes for Ukraine sponsorship scheme which was announced in Parliament by the Secretary of State for Levelling Up, Housing and Communities on 14th March 2022

London Borough of Hammersmith & Fulham

Report to: Cabinet

Date: 13/01/2025

Subject: Council Tax Base and Collection Rate 2025/26 and Delegation of the Business Rate Estimate

Report of: Councillor Rowan Ree, Cabinet Member for Finance and Reform

Report author: Jamie Mullins, Assistant Director, Revenues

Responsible Director: Sukvinder Kalsi, Executive Director for Finance & Corporate Services

SUMMARY

This report is a statutory requirement that sets the Council Tax base for the purposes of the 2025/26 revenue budget.

The proposed 2025/26 Council Tax base is 88,304. This is an increase of 2,191 on the figure agreed for 2024/25 and will result in an increased income, based on the 2024/25 Band D Council Tax charge, of £2.0m for Hammersmith & Fulham.

The report also delegates authority to the Executive Director for Finance & Corporate Services to determine the business rates tax base for 2025/26.

RECOMMENDATIONS

1. That Cabinet agrees to refer this report to Full Council and recommend approval by Full Council for the financial year 2025/26 of:
 - a. - The estimated numbers of properties for each Valuation Band as set out in this report.
 - b. - An estimated collection rate of 97.0%.
 - c. - The Council Tax Base of 88,304 Band "D" equivalent properties.
 - d. - The delegation of authority to the Executive Director for Finance & Corporate Services to determine the business rates tax base for 2025/26.
-

Wards Affected: All

Our Values	Summary of how this report aligns to the H&F Values
Building shared prosperity	Keeping the Council Tax low and providing Council Tax support help residents to maintain affordable living costs.
Creating a compassionate council	We continue to lead on Ethical Debt collection by working closely with vulnerable residents and advice agencies and not employing Enforcement Agents for the collection of Council Tax for those who claim Council Tax Support. Similarly, we have one of the most comprehensive Council Tax Support Schemes in the country, providing relief for those least able to pay. .
Being ruthlessly financially efficient	The recommendations in this statutory report will ensure that the Council will charge the new premium on long term empty properties and second homes. These premiums will generate additional income and contribute to one of the lowest Council Tax rates in the country.
Taking pride in H&F	The Council's policy on charging the premiums on empty or second properties will also encourage landlords to bring these properties back in to use and creating safer and cleaner communities for residents and contributing to the prevention of homelessness.

Financial Impact

Council Tax Base

The Local Government Finance Act 1992 requires that the council set the tax base by 31 January each year. It is used within the overall Council Tax and budget setting process, due to be reported to Cabinet on the 10th of February 2025 and to Budget Council on the 26th of February 2025.

The proposed Council Tax Base for 2025/26 of 88,304 is 2,191 Band D equivalents, higher than the 86,113 agreed for 2024/25.

Council Tax base changes.

The main reasons for the tax base change are:

	Band D Equivalents
Change in actual Tax Base from September 23 to September 24	757
Forecast increase in new properties	1,274
A forecast reduction in the number of single persons discounts	(234)
Forecast increase in exemptions reducing tax base	(598)
Forecast increase for second home and empty premium changes	1,175
Forecast reduction because of care leavers, foster carers, special guardianship orders & other discounts	(183)
Increase from the 2024/25 tax base	2,191

The financial implications of this report will be incorporated in the final version of the 2024/25 budget report and Council Tax calculations to be considered by the Cabinet and Full Council.

The movement in the taxbase and that of prior years will be analysed to inform the medium-term financial strategy for the Council and future years taxbase projections.

Andre Mark, Head of Finance, Strategic Planning and Investment, 13 November 2024.
Verified by James Newman, AD Finance, 13 November 2024.

Legal Implications

The Council has a statutory duty to set the Council Tax each year and this report is part of this process.

The relevant regulations and legislation together with the legal basis for agreeing the recommendations relating to the Council Tax base are found under section 31B of the Local Government Finance Act 1992 which imposes a duty on a billing authority to calculate its Council Tax by applying a formula laid down in that section. This relies on calculating a figure for the Council Tax base for the year. The Local Authority (Calculation of Council Tax Base) (England) Regulations 2012 require a billing authority to use a given formula to calculate the Council Tax base. The Council Tax (Prescribed Classes of Dwellings) (England) Regulations 2003, as amended in 2012 and Council Tax (Exempt Dwellings) (England) (Amendment) Order 2012 address the position of second and unoccupied homes.

Jade Monroe, Chief Solicitor, Social Care, Email: jade.monroe@lbhf.gov.uk, 11 November 2024

Background Papers Used in Preparing This Report

None

DETAILED ANALYSIS

Discounts and Premiums

Second Homes and Empty Properties Premiums

1. Due to a Statutory legislative amendment which was passed in October 2024, we will be charging an additional 100% premium on second homes from the 1st of April 2025. Empty properties which were previously subject to a 100% premium after two years of being empty will now be charged that premium after 12 months. The second homes and empty properties premium changes are projected to raise an additional 1175 band D equivalents.
2. Based upon 2024/25 Council Tax levels, this generates additional income to the Council of £1.07m. Our preceptor, the Greater London Authority (GLA), also benefits from the addition premiums.

Council Tax Support

3. Under Council Tax support, Hammersmith & Fulham and the GLA absorb the full cost of the scheme. This mirrors the previous Council Tax benefit arrangements. For 2025/26, the Council has provided Council Tax support discounts that equate to 10,026 Band 'D' equivalents. Based on 2024/25 Council Tax levels, this represents financial support of £13.90m (including the GLA precept).
4. The tax base regulations require the cost of the scheme to be treated as a discount and deducted from the Council's tax base calculation.

Valuation Band Properties

5. In previous years the latest information on the number of properties within each valuation band is contained within a return (CTB1), which the Council provided to the DLUHC on 7 October 2024. That return reflected the actual number of properties shown in the Valuation List as of 9 September 2024, and the Council's records as of 16 October 2024.
6. A detailed analysis of the properties in each valuation band is summarised below. There are 94,867 dwellings on the list with 28,855 properties estimated to receive a single person's discount. The total Band "D" equivalent is approximately 99639.5 properties.

Council Tax Base Return Summary (CTB1)

Band	Band Size	Total Dwellings	Total after Discounts, Premiums, Exemptions and Disabled Relief	Ratio	Band "D" Equivalents
A	Values not exceeding £40,000	4114	2992.3	6/9	1994.8
B	Values exceeding £40,000 but not exceeding £52,000	6627	4960.8	7/9	3858.4
C	Values exceeding £52,000 but not exceeding £68,000	14502	12610.3	8/9	11209.1
D	Values exceeding £68,000 but not exceeding £88,000	25910	23254.3	9/9	23254.3
E	Values exceeding £88,000 but not exceeding £120,000	17310	15842.3	11/9	19362.8
F	Values exceeding £120,000 but not exceeding £160,000	11216	10338.5	13/9	14933.4
G	Values exceeding £160,000 but not exceeding £320,000	12258	11557.8	15/9	19262.9
H	Values exceeding £320,000	2930	2881.5	18/9	5763.0
	Total	94867	84439.0		99639.5

Adjustments to the Valuation List

7. The above table shows the valuation band position on 07 October 2024, but the Council is also required to consider any likely changes that may arise for the financial year 2025/26. Therefore, the following adjustments need to be considered:

New Properties

8. There are likely to be a number of new properties, conversions etc added to the valuation list at some point during the year. There are approximately 1001 units currently under construction on various sites in the borough that will be added to the tax base sometime during 2025/26. It is estimated after allowing for different completion dates that this will equate to an additional 1273.5 Band 'D' equivalents.

Single Person Discounts (SPD)

9. Based on Sole Occupier Discount increases over the last year following on from the SPD review, we are projecting that an additional 234.4 band D equivalents by 1st April 2025.

Student Exemptions

10. Dwellings wholly occupied by students are exempt from Council Tax. The projected Council Tax base needs to be adjusted to allow for students that have

yet to prove their exemption for the new academic year. It is estimated that an adjustment of 597.6 Band D equivalents is required.

Council Tax Support

11. The cost of the scheme equates to 10,026 Band “D” equivalents, based on 2024/25 Council Tax levels, which are deducted from the tax base for 2025/26. This is less than the deduction of 10,355 Band D equivalents made in 2024/25. This is due to a small decrease in the number of claimants applying for a discount.

Care Leavers, Foster Carers and Special Guardianship Orders

12. For 2025/26, the Council has provided discounts for care leavers up to the age of 25. This equates to 110.5 Band D equivalents based on 2024/25 Council Tax levels. The cost of this discount is fully funded by the Council and needs to be deducted from the council’s tax base calculation.

From the 1st of April 2024, the Council has also provided an exemption for In-House foster carers and special guardians residing in the Borough. This equates to 72 Band D equivalents based on 2024/25 levels, The cost of this exemption will be fully funded by the Council and also needs to be deducted from the council’s tax base calculation.

13. The Council is required to set its tax base on the total of the relevant amounts for the year for each of the valuation bands shown or is likely to be shown for any day in the year in the authority’s valuation list.
14. Based on the CTB1 calculation of 7 October 2024 and the proposed adjustments, the Council is requested to approve the estimated numbers of
15. properties for each valuation band as set out in the following table:

2025/26 Council Tax Base Calculation

Band	Band “D” Equivalent Actual September	Adjustments for New Properties	Adjustments for Student Exemptions	SPD	Projected increase for second home and empty premium changes	Care Leaver Foster carers, special guardian ship orders	Revised Band “D” Equivalent
A	1,533.8	0	-13.3	-10.3	19.7	-16.6	1,513.3
B	2,833.6	0	-20.2	-22.7	36.9	-38.1	2,789.5
C	8,976.4	0	-70.2	-20.4	102.7	-32.8	8,955.7
D	20,199.2	481	-157.0	-62.0	222.6	-46.0	20,637.8
E	17,465.3	80.6	-140.5	-36.6	167.5	-23.2	17,513.1
F	14,070.5	290.3	-145.8	-38.2	115.8	-18.7	14,273.9
G	18,776.2	421.6	-46.6	-33.7	393.4	-7.1	19,503.8
H	5,745.0	0	-4.0	-10.5	116.5	-0	5,847.0
Total	89,600.8	1,273.5	-597.6	-234.4	1,175.1	-182.5	91,034.9

Collection Rate

16. The Council is also required to estimate its collection rate for 2025/26 at the same time as arriving at the estimated number of properties within the tax base. In arriving at a percentage collection rate for 2025/26, the Council considers the likely sum to be collected, previous collection experience and any other relevant factors.
17. The actual sum to be collected from local Council Taxpayers cannot be finally determined until the preceptor's requirements are known and the Council has approved its budget. The Council therefore must make an estimate of the sums to be collected locally making estimated allowance for sums from Council Tax support and write-offs/non-collection.
18. The actual collection rate for 2024/25 achieved to the end of October 2024 is 59.22% comprising cash collection of £74.6m and Council Tax Support of £13.8m. It is estimated that a further £46.02m (37.78%) will need to be recovered thereafter to obtain the overall target of 97%.
19. It is suggested that the collection rate for 2025/26 is set at 97%.
20. Council Tax debt position has been given specific focus, and we expect to see a marked improvement in 2025/26. Residents have been helped by our ethical approach to debt recovery and repayment plans – which is both empathetic and effective in collecting revenues. However, for those who refuse to pay their council tax and haven't spoken to us about help with their finances, we have no other option other than to recoup this funding through all available legal means, if necessary. This includes the use of Enforcement Agents. We have a duty to those taxpayers who are paying to pursue those that can pay but won't."

The Tax Base

21. Under Section 31(B) of the Local Government Finance Act 1992 and the Regulations, the Council's tax base is calculated by multiplying the estimated number of Band "D" equivalents by the estimated collection rate.
22. Based on the number of Band "D" equivalents in the table in paragraph 9. Above and the estimated collection rate in paragraph 19 above, the calculation is as follows:

$$(\text{Band D equivalents}) \times (\text{Collection Rate}) = (\text{Tax Base})$$

$$91,035 \times 97.0\% = 88,304$$

Business Rates Tax base

23. The Local Government Finance Act 2012 made it obligatory for authorities to formally calculate the estimated level of business rates (the business rates tax base) it anticipates collecting for the forthcoming financial year and passing this information to precepting authorities by 31 January. The Government continues to set the tax rate (known as the non-domestic multiplier).

24. The tax base is based on data from the Valuation Office with local allowance for the appropriate level of business rates appeals, the provision for bad debts, any discretionary reliefs and any forecast growth. This information is pulled together into a government return (NNDR1). The detailed guidance on completing the NNDR1 will be issued just before Christmas.

25. Non-Domestic Rating

For 2025/26, with the temporary Retail Hospitality and Leisure (RHL) Relief expiring, the government is introducing a new discount rate of 40%. The small business multiplier will be frozen for 2025/26 for properties receiving RHL relief.

Equality Implications

26. There are no anticipated negative implications for groups with protected characteristics, under the Equality Act 2010, by the approval of these proposals. In acknowledgement of the significant inequalities, discrimination and stigma faced by care leavers, this report exempts care leavers from Council Tax up to the age of 25.

27. From the 1st of April 2024, the Council has also provided an exemption for In-House foster carers and special guardians residing in the Borough.

Risk Management Implications

28. The report considers the implications required by the Council to meet its obligations under the Local Government Finance Act 2012 which made it obligatory for authorities to formally calculate the estimated level of business rates (the business rates tax base) it anticipates collecting for the forthcoming financial year and passing this information to precepting authorities by 31 January. The Council is also required to estimate its Collection Rate for 2025/26 at the same time as arriving at the estimated number of properties within the Tax Base. The Council is required Under Section 33(1) of the Local Government Finance Act 1992 and The Local Authorities (Calculations of Council Tax Base) (England) Regulations 2012, the Council (as billing authority) to calculate its Council Tax Base. The proposals are compliant with statutory duties and are provided in accordance with management of standing risk to manage the Council's finances. Changes in the recovery policy are anticipated to have a beneficial impact on the collection rate from 2025/26, which will further protect funding for essential frontline services. The Council has or will be taking steps to support specific groups through the use of discounts, including care leavers, in-house foster carers and special guardians.

Implications verified by, David Hughes, Director of Audit, Fraud, Risk and Insurance, 8 November 2024.

LIST OF APPENDICES

None

London Borough of Hammersmith & Fulham

Report to: Cabinet

Date: 13/01/2025

Subject: Personal Budget Policy for Education Provision within an Education, Health and Care (EHC) Plan

Report of: Councillor Alex Sanderson, Deputy Leader (responsible for Children and Education)

Report author: Joe Gunning, Head of Programmes and Roisin Conroy, Commissioning and Transformation Lead

Responsible Director: Jacqui McShannon, Executive Director of People's Services

SUMMARY

The Personal Budget Policy sets out H&F's person-centred approach intended to give parents, carers and young people more flexibility, choice and control over the support they use and enables them to make their own decisions as a family about what works best for them in relation to the Education provision specified in the child or young person's Education, Health and Care Plan.

This policy formalises the application process for Personal Budgets. Parents active have been actively involved in coproducing the drafting of this policy to ensure it is as clear and accessible as possible for parents/carers applying for personal budgets for their child/young person.

RECOMMENDATIONS

1. That Cabinet approves the publication of the EHC Personal Budgets Policy attached at Appendix 1.
-

Wards Affected: All

Our Values	Summary of how this report aligns to the H&F Values
Building shared prosperity	Ensuring those with EHC plans have access to the personal budget they are entitled to so that they can prosper.

Creating a compassionate council	Listening and responding to feedback from professionals, young people, parents, carers, education settings and wider partners regarding the need for easy to comprehend policies.
Doing things with local residents, not to them	The documents were developed following engagement with families. They have been further updated in response to feedback received through consultation with wider stakeholders, including Parentsactive and SENDIASS.
Being ruthlessly financially efficient	This policy will consistency in the administration of personal budgets to eligible children, and young people.
Taking pride in H&F	Support H&F to be the best place to grow up, live and work. This policy will ensure our support to children and young people with SEND enabling them to lead happy, healthy, and fulfilling lives and achieve their life goals.
Rising to the challenge of the climate and ecological emergency	There are no anticipated climate and ecological implications as a result of the publication of these documents.

Financial Impact

There are no direct financial implications associated with the publication of the EHC Personal Budgets Policy. It is expected that the implementation of the policy will be managed within existing Children’s Services structures by existing budgets.

Implications by: Tony Burton, Head of Finance Children’s Services and Education, 18 October 2024.

Verified by James Newman, AD Finance, 31 October 2024.

Legal Implications

There are no direct legal implications associated with the publication of the EHC Personal Budgets Policy. In applying the policy, the council must ensure that each case is considered on the facts and blanket policies are not applied to all, to avoid legal implications by way of Judicial Reviews. Each decision must be well documented and shared with the subject within the stated timescales.

The strategy is produced in the context of the statutory requirements set out in the Children and Families Act 2014 together with the guidance in the SEN Code of Practice and The Special Educational Needs (Personal Budgets) Regulations 2014 that were

issued alongside the 2014 Act. Publication of the policy contributes to the fulfilment by the Council of these obligations.

Implications by: Razmin Rima Hussain, Senior Solicitor, 11 October 2024.

Background Papers Used in Preparing This Report

None

DETAILED ANALYSIS

Proposals and Analysis of Options

1. The Special Educational Needs (Personal Budgets) Regulations 2014 set out that Local Authorities must ensure children, young people and parents are provided with information and advice on the take up and management of Personal Budgets.
2. The EHC Personal Budgets Policy establishes the process by which children, young people and their families may apply for a Personal Budget to deliver provision relating to outcomes laid out in Section F of the child or young person's Education Health and Care Plan.
3. The policy will be seen as a key document for any future inspections.

Option 1 – Publish the H&F EHC Personal Budgets Policy (Recommended)

4. The policy document formalises Hammersmith & Fulham's approach to Personal Budgets in accordance with the statutory guidance and provides clear guidance on the eligibility, use and monitoring of Personal Budgets. Publishing the policy will ensure consistency in decision making and provide clarity to families and professionals on the approach in H&F.
5. The Policy is in line with the Council's commitment of doing things with residents, not to them, and is part of the person-centred approach intended to give parents, carers and young people more flexibility, choice and control over the support they use and enables them to make their own decisions as a family about what works best for them.
6. This option is recommended.

Option 2 – Do not publish the H&F EHC Personal Budgets Policy (Not recommended)

7. This option will mean that our families may struggle to understand the process of applying for an EHC Personal budget, this could negatively impact children and

young people with SEND, and their families. This would also be in contrary to the regulations in which Local Authorities must provide information and advice on Personal Budgets to families and not align to the Council's commitment of doing things with residents, not to them.

8. This option is not recommended.

Equality Implications

9. The formalisation of this policy will provide children, young people and their families greater choice and control over the support they use. It is anticipated that this policy will have a positive impact on those with protected characteristics.

Risk Management Implications

10. There are no identified risks that impact either LBH&F or the service it provides. The report recommends approval of a policy in line with regulations and developed with stakeholders, including the parent/carer forum. The policy provides a clear approach to administering personal budgets, is in line with being a compassionate council and in being ruthlessly financially efficient.

Implications by: Jules Binney, Risk and Assurance Manager, 8 October 2024.

Climate and Ecological Emergency Implications

11. There are no anticipated climate and ecological implications as a result of the publication of the policy.

Implication by: Hinesh Mehta, Assistant Director Climate Change, 14 October 2024.

Consultation

12. Whilst the policy is a direct application of the regulations, Officers have used the feedback and 'thousands of everyday conversations' via our Parent/Carer forum to shape and influence the language of this policy to ensure it is clear and accessible.
13. Parentsactive has actively supported the shaping and development of this policy, and their feedback and comments have been reflected in this final version. We have committed to create an accessible PDF version of this policy once the core document has been approved.

LIST OF APPENDICES

Appendix 1: Personal Budget Policy for Education Provision within an Education, Health and Care (EHC) Plan

APPENDIX 1

HAMMERSMITH & FULHAM PERSONAL BUDGET POLICY FOR EDUCATION PROVISION WITHIN AN EDUCATION, HEALTH AND CARE (EHC) PLAN

Contents

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WHAT IS A PERSONAL BUDGET?

A Personal Budget is an amount of money that is used to help children/young people with special educational needs and disabilities and their families choose the kind of support and services which will help them reach the agreed outcomes set out in the child/young person's Education, Health and Care (EHC) Plan.

Personal Budgets can include funding from Education, Health and Social Care, each service has its own eligibility criteria. This policy relates to the education provision within Section F of an EHC Plan.

BACKGROUND

This policy sets out the formal position of the Council regarding the eligibility, purpose and authorised usage, processes and requirements of the Council, and families in receipt or wanting to receive Personal Budget. The Children and Families Act 2014 and supporting statutory guidance introduced new legislation in respect of Personal Budgets, including the Special Educational Needs (Personal Budgets) Regulations 2014.

This policy is for professionals, young people and parents/carers of children with an EHC Plan. Each Personal Budget is assessed and subsequently granted or declined based on individual merits, to secure provision and outcomes outlined in Section F of the Education Health and Care Plan (EHCP).

WHAT CAN A PERSONAL BUDGET BE SPENT ON?

A Personal Budget is a direct payment to a parent/carer or young person (or representative) that is allocated to be spent on the identified provision in Section F of an EHC plan in order to support desired outcomes in an EHC plan.

There are four ways in which a child's parents/carers or young person can be involved in securing provision:

- Personal Budget where the child's parents or young person receive the funding to contract, purchase and manage the services themselves.
- An organised arrangement where the Council, school or college holds the funds and commissions the support specified in the plan. These are sometimes called notional arrangements and can also be used where contractual, or funding arrangements mean that cash cannot be released as a Personal Budget or where economies of scale are present.¹

¹ 'Economies of Scale' = cost advantages when production of goods/ a service becomes more efficient.

- Third party arrangements where Personal Budgets are paid to and managed by an individual or organisation on behalf of the child's parent or young person.
- A combination of the above.

This policy relates only to Education provision within an EHC Plan. The budget can only be used for provision set out in Section F of the child/young person's EHC Plan to meet the identified outcomes for the child/young person.

Example, Child A's EHC Plan states they should receive one hour of hydrotherapy per week and a Personal Budget is provided to pay for this. Providing a two-hour session every fortnight or two-hour swimming session instead would not be appropriate.

The Personal Budget excludes any provision not specified in Section F, such as:

- Payment for a place at a school or college
- Bills such as rent or mortgage
- Purchase household items
- Food, shopping, sundries, or refreshments
- An activity or service for someone else
- Anything illegal or adult activities such as alcohol and gambling

A Personal Budget will not be provided where the Council has delegated the funding to a school to deliver provision specified within Section F of an EHC Plan, or where the sum is part of a larger amount and disaggregation² of the funds for the Personal Budget would have an adverse impact on services provided or arranged by the Council for other EHC plan holders, or where it would not be an efficient use of the Council's resources. In these circumstances, the Council will inform the child's parent/carer or the young person of the reasons it is unable to identify funding following a request for a Personal Budget and will work with them to ensure that services are personalised through other means so that Section F of the EHC Plan is able to be met.

In most cases, provision set out in Section F will be expected to be met by a child or young person's educational setting through its school budget share, including its SEN funding, as well as that additional funding allocated through a child or young person's EHC plan.

It is important to remember that any changes to a child's or young person's needs and provision (Sections B and F of the EHC plan) are discussed with their allocated EHC Caseworker. The best time to do this is during an Annual Review meeting. You must always discuss a change in your/your child's support needs with your EHC Coordinator before making any decisions to reallocate your funds.

² Disaggregation: dividing/ separating into parts.

WHO CAN REQUEST A PERSONAL BUDGET?

The following may request a Personal Budget:

- The child/young person's parent/carer
- The child/young person
- a person nominated in writing by the child's parent/carer or the young person to receive the Personal Budget on their behalf.

Personal Budgets may only be made if the person:

- appears to the Council to be capable of managing direct payments without assistance or with such assistance as may be available to them;
- where the recipient is an individual and above school age (16+);
- does not lack capacity within the meaning of the Mental Capacity Act 2005 to consent to the making of direct payments to them or to secure the agreed provision with any direct payment; and
- where a nominee has been appointed. If the child's parent or young person notifies the Council in writing that they wish to withdraw or change their nomination, the Council will stop the Personal Budget payments to the nominee as soon as reasonably practicable and, where applicable, consider whether to make Personal Budget payments to the alternative nominee.

HOW CAN I REQUEST AN EHC PERSONAL BUDGET?

A parent/carer, or the young person (aged 16+) can request a Personal Budget, when the Council has completed an EHC Needs Assessment (EHCNA) and confirmed that it will begin to draft an EHC plan with the parent/carer at a coproduction meeting. Parents/carers may also request a Personal Budget during a statutory review (Annual Review) of an existing EHC plan.

Requests for Personal Budgets should be submitted to the EHC Casework Service, by completing the application form at Appendix 1 of this policy.

The Council will provide an indication of the level of funding that is likely to be required to make the provision specified or proposed to be specified in section F of the EHC plan. As part of a person-centred approach to the development of the EHC plan, the Council will agree the provision to be made in the plan and help the parent or young person to decide whether they want to take up a Personal Budget.

HOW ARE DECISIONS MADE?

Each decision is made on its own individual merits and budgets may be agreed to meet outcomes for a set period. Requests for Personal Budgets will be considered by the EHC Panel, which comprises of representatives from Education, Health and Social Care. The views of the multidisciplinary EHC panel concerning requests for a Personal Budget will inform the Council's decision. As a public body, the Council's

decision on whether to allocate a Personal Budget will take account of the efficient use of existing resources and value for public funding.

The key principles in considering any request will be whether:

- There is clear evidence of special educational needs which the request is seeking to meet.
- The request is linked to the achievement of specific outcomes in the EHC Plan.
- The request is not able to be met through the education, health and care provision and support allocated.
- The services for which a Personal Budget has been requested could be commissioned more cost effectively elsewhere.

The Council will provide written notice to the recipient setting out:

- The goods or services which are to be secured by the Personal Budget.
- The proposed amount of the Personal Budget.
- Any conditions on how the Personal Budget may be spent.
- The dates for payments into the bank account approved by the Council.
- The arrangements for an evaluation of the impact of the agreed Personal Budget.

Parents/ carers and young people requesting a Personal Budget must provide information on how they plan to meet the provision stated in Section F of the EHC plan, and what it will cost. If agreed the family/representative or young person will need to enter into a formal written agreement with the Council before funding is allocated.

HOW MUCH WILL I BE PAID?

The amount that is received through a Personal Budget will be calculated by the Council based on the assessed need. This will then be considered by the EHC Panel in its advisory role for the Council. It is important to note too that before a Personal Budget can be agreed, the Council must be assured that additional funding through a Personal Budget relating an EHC plan is required in order to support a child or young person over and above the funding ordinarily available in educational settings.

HOW WILL I BE PAID MY PERSONAL BUDGET?

Personal Budgets for Education provision are paid by a Direct Payment. Direct payments are cash payments made directly to the parent/carer, the young person or their representative, thereby enabling them to arrange the provision in the EHC plan themselves.

The Personal Budget will be paid termly in advance of each term commencing.

MONITORING

The Council must monitor the use of Personal Budgets. A review will take place at least once in the first three months and when undertaking a review or a re-assessment of an EHC plan. The review will consider whether to:

- continue the use of Personal Budget to secure agreed provision
- whether the Personal Budget has been used effectively
- whether the amount continues to be sufficient
- whether the decision to provide a Personal Budget still applies and
- whether the recipient has complied with the conditions for being allocated a Personal Budget.

A recipient may ask the Council to review the decision and use of the Personal Budget. This request must be considered by the Council.

Parents/carers will be asked to provide receipts and agree to monitoring arrangements with the Council.

The Council can refuse to make payments if:

- It does not believe the person receiving the payments would be capable of managing the money allocated.
- It does not believe it would be used in an appropriate way.
- It would negatively impact other services provided by the Council.
- It would not be an efficient use of resources.

REPAYMENT AND RECOVERY OF PERSONAL BUDGET

The Council may require the recipient to repay all or part of the Personal Budget:

- Where the child's or young person's circumstances have changed.
- All or part of the Personal Budget has not been used as agreed.
- An offence has been committed in relation to the Personal Budget.
- Or when the child or young person has died.

In the event of a notice of repayment, the amount to be repaid, the reasons for the decision and a reasonable timescale for repayment will be sent to the recipient in writing.

SENDIASS

SEND Information and Advice Support Service (SENDIASS) [H&FSENDIASS \(hfsendiass.org.uk\)](http://hfsendiass.org.uk) can support families with queries around Personal Budgets in an advisory capacity.

Contact	Information
Email	info@hfsendiass.org.uk
Phone Number	020 3886 1582

APPEALS

If the Council refuses a request for a Personal Budget for special educational provision on the grounds set out in regulations, reduces the Personal Budget amount, or stops the Personal Budget, the Council must set out their reasons in writing and inform the child's parent/carer or the young person of their right to request a formal review of the decision.

The Council must consider any subsequent representation made by the child's parent or the young person and notify them of the outcome, in writing, setting out the reasons for their decision.

COMPLAINTS

Council complaints procedure:

The Council operates a statutory complaints procedure and may process or investigate complaints about all aspects of Personal Budgets. Details of how to complain about a Council service or decision can be found at <https://www.lbhf.gov.uk/Councillors-and-democracy/complaints>

Complaints about providers:

Children, young people and their families must not use the Council procedure for complaints about the services which they have purchased from independent sector agencies. These complaints must be addressed to the providers directly.

Challenges with workers employed by the family:

Any issues with carers employed directly by the family through Personal Budgets must be dealt with by the family as the employer. If there is a safeguarding concern, it is important to follow the [Local Safeguarding Children's Board](#) procedures.

DEFINITIONS

Council: London Borough of Hammersmith and Fulham

EHC Panel: Multi-agency panel comprising of representatives from Education, Health, and Social Care.

Personal Budget: the amount of money that the local and health authorities have agreed it will cost to meet the outcomes in the EHC plan. A Personal Budget is allocated in recognition that the child's or young person's support needs cannot be met in full by mainstream/universal or targeted services without an additional individual investment being made. The Personal Budget can be payable as a direct payment, and it may be provided from 3 different funding streams for example, education, health, and social care.

Direct payment: The method of payment for Personal Budget. A cash payment made to an individual, so that they can arrange their own services. The payment must be sufficient to enable users to purchase services to meet their outcomes and needs as specified in the EHC plan. If the Personal Budget is agreed, a direct payment will be made to the child's parent or to the young person or to a nominee.

Indicative/notional budget: the amount of money the Council and health authorities estimate it will cost to meet a child's/young person's education, health and care assessed needs.

Targeted support: services and support targeted at children and young people due to a particular learning support need. At a school level, targeted support will mean support focussed on one or more children and young people in a class or in a group, where there is a shared offer of support. This may include funding of support staff. This support will be funded through the budgets of early years settings, schools, and colleges.

Young person: for the purpose of this policy, this describes a young person, who is no longer of compulsory/statutory school age i.e., who has reached the end of Year 11.

Appendices

Appendix One: [Personal Budget Application Form](#)

Report to: Cabinet

Date: 13/01/2024

Subject: Joint Waste Strategy

Report of: Councillor Sharon Holder, Cabinet Member for Public Realm

Report author: Annie Baker, Assistant Director Street Environment Services

Responsible Director: Bram Kainth, Executive Director of Place

SUMMARY

A Joint Waste Strategy has been developed by the Western Riverside Waste Authority (WRWA, our Waste Disposal Authority) and its four constituent Waste Collection Authorities (the London Boroughs of Hammersmith and Fulham, Lambeth, Wandsworth and the Royal Borough of Kensington and Chelsea). The Joint Waste Strategy is a statutory requirement for the Waste Disposal Authority and Waste Collection Authorities.

Following input from all the boroughs and agreement from the WRWA's Committee in June, a Draft Strategy document went out for formal consultation this autumn and is now being submitted for adoption by each of the constituent boroughs and the WRWA.

RECOMMENDATIONS

1. It is recommended that Cabinet approves the adoption of the Joint Waste Management Strategy as set out in the Final Draft version appended to this report.
2. It is recommended that, if any further changes are requested to the draft document (for example by another borough or the Greater London Authority), the decision as to whether to accept these should be delegated to the Executive Director of Place in consultation with the Cabinet Member for Public Realm.

Wards Affected: All

Our Values	Summary of how this report aligns to the H&F Corporate Plan and the H&F Values
Building shared prosperity	The Joint Municipal Waste Strategy seeks to maximise social value benefits through waste and resource

	management, by encouraging upskilling and the creation of new job opportunities within the sector.
Creating a compassionate and inclusive council	The strategy's actions include undertaking education activities to support residents to reduce their waste and increase what can otherwise be recycled or composted from the residual waste stream.
Doing things with local residents, not to them	The strategy aims to support the boroughs to provide easy-to-use and clearly defined services, that respond to local resident needs, and encourage participation.
Being ruthlessly financially efficient	The strategy aims to maximise the value from the existing waste treatment contract through increased capture of re-useable and recyclable material. In addition it sets out its aim to demonstrate to residents and businesses the economic value in preventing/minimising waste, repairing items and buying reused through signposting to local resources including the reuse workshop located at Smugglers Way. Actions in the strategy include identifying opportunities to minimise waste and extract more recyclable material from kerbside collections, bulky waste, street cleansing waste and fly tipped materials; these will reduce our waste disposal costs.
Taking pride in H&F	The Joint Municipal Waste Strategy supports the work of boroughs to maintain clean streets and manage waste arisings in the most sustainable and efficient way.
Rising to the challenge of the climate and ecological emergency	The strategy includes identifying key areas of focus to reduce emissions through the development of a Net Zero action plan and exploring options to transition to low carbon fuels and electricity sources where infrastructure allows.

Financial Impact

The proposed Joint Waste Management Strategy is a joint agreement of Western Riverside Waste Authority (WRWA) and its four partner boroughs (H&F, LB Wandsworth, LB Lambeth and RB Kensington & Chelsea). The overarching aim of

the strategy is to work in partnership to prevent waste, enhance resource efficiency and minimise greenhouse gas emissions. It is not expected that there will be any new immediate financial implications arising from adopting the proposed strategy.

Any financial implications resulting from legislative changes in this area (such as the introduction of Extended Producer Responsibility for waste packaging and Deposit Return Scheme for drinks cans and plastic bottles), will be considered and included in the Council's budget as appropriate as Government plans for implementation become clearer. It should also be noted that the unit cost of residual waste processing is expected to increase from 2028, when waste incinerators are expected to be included in the UK Emissions Trading Scheme. In readiness for this, and to mitigate any cost increase as far as possible, H&F and the other partner boroughs will need to work with WRWA to reduce residual waste arisings as far as possible. This will also need to be factored into the Council's Medium Term Financial Strategy.

The planned actions to reduce residual waste tonnages and increase recycling will, if successful, lead to cost savings for the Council as it is currently much cheaper to process a tonne of recycling than it is to process a tonne of residual waste. In H&F (based on current waste tonnages), every 1% of tonnage transferred from residual waste to recycling would save H&F approximately £68,000 per annum.

Kellie Gooch, Head of Finance (Place), 22 November 2024.

Verified by Andre Mark, Head of Finance (Strategic Planning and Investment), 25 November 2024.

Legal Implications

Waste authorities for a two-tier area are obliged under the Waste and Emissions Trading Act 2003 to put in place a strategy for the management of waste. The Council is in a two-tier area. It and the other three constituent authorities which make up the Western Riverside Waste Authority are the waste collection authorities for the area and the WRWA is the waste disposal authority.

These arrangements were established under the Environmental Protection Act 1990. There have been significant legislative changes in relation to the collection and disposal of waste over the last few years and the strategy takes account of these changes.

Prior to the adoption of the strategy the authorities must undertake such consultation as they consider appropriate. The Council has undertaken consultation in accordance with these requirements and the outcome of the consultation has been taken into account in formulating the strategy.

The waste management strategy appended to the report is in compliance with the Council's statutory requirements.

John Sharland, Legal services 22 November 2024.

Background Papers Used in Preparing This Report

None

DETAILED ANALYSIS

Proposals and Analysis of Options

1. The Joint Waste Strategy has been developed by the Western Riverside Waste Authority (WRWA, our Waste Disposal Authority) and its four constituent Waste Collection Authorities that consist of LBHF, Lambeth, Wandsworth and the Royal Borough of Kensington and Chelsea.
2. A Joint Waste Strategy is a statutory requirement for the Waste Disposal Authority and Waste Collection Authorities. The work on this strategy began in 2023. The strategy has been developed with the involvement of officers and Members from LBHF alongside the other constituent authorities.
3. Following input from all four Waste Collection Authorities, and with agreement from the WRWA's Committee in June, the Draft Strategy went out for formal public consultation this autumn and is now being submitted for adoption by each of the constituent boroughs and WRWA.
4. The strategy supports the broad objectives of all four of the boroughs, with nine strategic themes as follows:
 - Customer Service
 - Low Carbon
 - Financial Considerations
 - Waste Prevention
 - Flexibility
 - Deliverability
 - Increased Recycling
 - Meeting Government Changes
 - Collaboration
5. The public consultation was conducted over a six-week period, from Monday 2nd September to Monday 14th October 2024. The consultation involved a range of methods to collect feedback from residents, businesses, and organisations in the Western Riverside area including:
 - An online Survey - open to residents and businesses
 - Focus Groups – one per Borough, with an additional focus group with mixed participants
 - Engagement with statutory stakeholders – a number of sessions with the GLA to explain the development of our modelling and to provide an overview of the proposed draft strategy
6. The consultation was publicised in the following ways:

- WRWA - Website news updates, dedicated strategy webpage, social media (Next door, X), and via the Smugglers Way Household Waste Recycling Centre (posters, digital screen and flyers in addition to mentions by staff when answering enquiries
 - Partner Authorities - Website news updates, consultation pages, social media (Facebook, X, Instagram, Next door, LinkedIn), physical and digital posters and flyers in public locations including libraries
 - Emails promoting the consultation to community groups and Business Improvement Districts (BIDs)
7. A total of 403 responses were received. The detailed responses have been submitted to the WRWA December Committee and the outcome is a recommendation that the Draft Strategy should be amended to include stretch targets for recycling within the strategy for 2030 for Local Authority Collected Waste and for Household Waste for the WRWA as a whole as follows:
- Work towards a target of recycling 35% of Local Authority Collected Waste by 2030, with a **stretch target of 38% by 2030** and 50% by 2040.
 - Work towards a target of recycling 30% Household Waste by 2030, with a **stretch target of 33% by 2030** and 45% by 2040
8. Each constituent authority is now considering the formal adoption of the Joint Municipal Waste Strategy and the WRWA is also awaiting feedback from the Greater London Authority. Should any further feedback result in any proposed changes to the strategy, it is recommended that the decision as to whether to accept these should be delegated to the Strategic Director in consultation with the Cabinet Member for Public Realm.

Reasons for Decision

9. A Joint Waste Strategy is a statutory requirement for the Waste Disposal Authority and Waste Collection Authorities including the London Borough of Hammersmith and Fulham. The Strategy has been developed with input from all of the Waste Collection Authorities and has been subject to public consultation. It is therefore recommended that this strategy be adopted by the London Borough of Hammersmith and Fulham.

Equality Implications

10. An Equality Impact Assessment has been provided as part of the development of the Joint Municipal Waste Management Strategy work and is appended to this report.

Risk Management Implications

11. There are no identified risks.

Jules Binney, Risk and assurance manager, 20 November 2024.

Climate and Ecological Emergency Implications

12. The Joint Waste Strategy with its strategic themes is likely to contribute positively to achieving the council's Climate Change objectives and actions. The issues and solutions sought are likely to be intrinsically linked to reducing waste and lowering carbon.
13. In addition, the joint strategy should support and enable people to make sustainable choices and gain new skills to reduce goods and materials that are thrown away through reuse, repair and recycling. This can be facilitated through WRWA's reuse workshop, ReWork.

Hinesh Mehta, Assistant director of climate change, 22 November 2024.

Consultation

14. A public formal consultation exercise has been undertaken as reported to the WRWA Committee.

LIST OF APPENDICES

Appendix 1 – Joint Municipal Waste Strategy
Appendix 2 – Equality Impact Assessment - EqIA

Joint Resources and Waste Strategy



EXECUTIVE SUMMARY

Introduction

This Strategy defines a collective ambition for waste management services for the Western Riverside Partners – the London Borough of Hammersmith & Fulham, the London Borough of Lambeth, the Royal Borough of Kensington and Chelsea, the London Borough of Wandsworth and Western Riverside Waste Authority (the Partner Authorities). In order to reach the ambitions for better waste management in the future, the Partner Authorities will need to work as a collective to prevent waste, enhance resource efficiency and minimise greenhouse gas emissions.

Why Action is Needed

In the next few years, the UK Government plans to implement schemes which will change the way in which waste is currently managed, which will lead to significant changes for local authorities. This includes the initiatives outlined in the Resources and Waste Strategy (2018) which aim to minimise waste, promote resource efficiency and move towards a circular economy model. The Government plans to introduce Extended Producer Responsibility for packaging and a Deposit Return Scheme on drinks cans and plastic bottles, which will shape the volume and type of material required for collection and processing in the future.

In addition to national legislative change, the London Environment Strategy (2018) sets the Mayor's ambitions to reduce waste, boost recycling and provide consistent collection services to residents, with contributions towards the Mayor's recycling targets expected from the boroughs. The Mayor has also set a target for London to be net zero carbon by 2030.

Current Context

This Strategy sets out the strategic aims and aspirations of the Western Riverside Partners in reducing the environmental impact in light of future changes and policies, and outlines how the Partner Authorities will work together to manage resources and waste within their boundaries between 2025 and 2040.

The Western Riverside Partners are responsible for collecting around 370,000 tonnes of municipal waste per annum (2022/23) through household and commercial collections and receipt of items at the Household Waste and Recycling Centre (HWRC) in Wandsworth and Vale Street Lambeth. Approximately 287,000 tonnes of household waste was collected at the kerbside, with around 23% sent for recycling or composting through the various dry recycling, garden waste and trial food waste collection schemes. Studies on the composition of WRWA's household waste show that nearly a quarter of sack/bin collections contain waste that could be recycled or composted through services that are currently provided to residents. A further 40% comprises of food waste. The Western Riverside Partners aspire to further reduce waste and improve recycling rates in the future with the support of the community and businesses.

The key to providing an affordable service is through the prevention of waste altogether. A significant proportion of the costs for managing waste are associated with residual waste treatment. For 2022/23 the combined collection and treatment costs for the Western Riverside Partners totalled £62 million, and approximately 53% of this was for residual waste treatment. The cost (£/tonne) of residual waste processing is likely to increase significantly in coming years, while

the UK Emissions Trading Scheme (UK ETS) will apply to waste incineration from 2028, meaning that there will be a 'cost of carbon' which will need to be taken into account for residual waste processing. The Western Riverside Partners will aim to reduce the cost of residual waste treatment by encouraging residents and businesses to reduce waste, repair and reuse items and recycle more, which will have the benefit of reducing both collection and disposal costs.

Vision, Themes and Actions

A collective draft vision statement for the Strategy has been agreed:

"The Western Riverside partners will work together with our residents and businesses to prioritise waste prevention, reduce our carbon emissions and environmental impacts, and provide customer focused waste and recycling services that maximise value from the materials we manage."

To achieve the Vision of this Strategy, the Western Riverside Partners, residents and businesses will need to work together to drive change. Four dedicated action plans will be developed within which a number of individual actions can sit, and progress can be monitored against the vision and a number of targets that will help the Partners support Government and Regional Targets, these include:

- Work towards a target of recycling 35% of Local Authority Collected Waste by 2030, with stretch targets of 38% by 2030 and 50% by 2040.
- Work towards a target of recycling 30% Household Waste by 2030, with a stretch targets of 33% by 2030 and 45% by 2040
- Halving residual waste by 2042 (reducing municipal waste to 333 kg/capita per year)
- Supporting the Mayor of London's target to reduce food waste by 50% by 2030

Action Plans

Transitioning to a circular economy – Adopting circular economy thinking involves sharing, reusing, repairing, refurbishing and recycling existing materials and products as long as possible to extend their lifespan.

Actions include:

- Developing a circular economy action plan, to investigate and plan for all identified waste prevention, reuse, repair and recycling actions.
- Expanding food waste collection services to all households by 31st March 2026 in line with the Environment Act 2021.
- Identify opportunities to extract more recyclable material from kerbside collections, bulky waste, street cleansing waste and fly tipped materials.

Achieving Net Zero - Reducing the environmental impact of collecting and treating WRWA's waste is important in reducing carbon emissions, mitigating the risks of climate change and reaching net zero goals.

Actions include:

- Identifying key areas of focus to reduce emissions through the development of a Net Zero action plan.
- Continuing to send all residual waste to energy-from-waste (EfW), with no waste sent to landfill.
- Exploring options to transition to low carbon fuels and electricity sources where infrastructure allows.

Collaborating and Communicating to amplify our impact - The key to success is through knowledge sharing, participation and engagement, which can only be achieved through collaborative efforts.

Actions include:

- Providing easy-to-use and clearly defined services, that respond to local resident needs, and encourage participation.
- Undertaking education activities to support residents to reduce their waste and increase what can otherwise be recycled or composted from the residual waste stream.
- Maximise social value benefits through waste and resource management, by encouraging upskilling and the creation of new job opportunities within the sector.

Delivering Best Value and preparing for the future - It is of utmost importance that the Western Riverside Partners deliver value for money for customers through services delivered, taking into account changing consumer habits, forthcoming regulations, and climate change that will influence the waste we generate as well as the future service costs.

Actions include:

- Maximise the value from the existing waste treatment contract through increased capture of re-useable and recyclable material.
- Demonstrate to residents and businesses the economic value in preventing/minimising waste, repairing items and buying reused through signposting to local resources including the reuse workshop located at Smugglers Way.
- Ensure services and infrastructure / assets meet all future needs including regulatory changes and increases in housing and population.

Monitoring Progress

Prior to implementation, the Western Riverside Partners sought to garner the views of residents, local businesses and communities on waste and the environment and the strategic vision via a public consultation process. The strategy was then updated to take on board this feedback.

Working together, the Western Riverside Partners will carry out annual reviews and progress monitoring through the lifespan of the Strategy to measure progress against strategy priorities and ensure WRWA remains on track with achieving its goals. A full review will be undertaken every 5 years to ensure the Strategy remains flexible and appropriate to current circumstances. Results of the annual review will be published on the Western Riverside Waste Authority website.

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Please note that this Joint Strategy was written in Spring 2024 and consulted on in Autumn 2024.

INTRODUCTION

WHAT IS A JOINT RESOURCES AND WASTE STRATEGY?

Western Riverside Waste Authority (WRWA) is the statutory Waste Disposal Authority (WDA) for the London Borough of Hammersmith & Fulham, the London Borough of Lambeth, the Royal Borough of Kensington and Chelsea and the London Borough of Wandsworth. WRWA provides a range of waste services for the treatment and disposal of Local Authority Collected Waste (LACW) from the four Councils. The Councils, as statutory Waste Collection Authorities (WCAs) provide a range of waste collection services to residents and businesses across their Boroughs.

Under the Waste and Emissions Trading (WET) Act 2003, authorities in two-tier areas (Where WCAs and WDAs work together) are obliged to develop and maintain a joint strategy for the management of household and business waste across the area.

The strategy sets the strategic direction for resources and waste services in the light of Government policies and forthcoming legislation to reduce waste, maximise recycling and eliminate waste disposal to landfill.

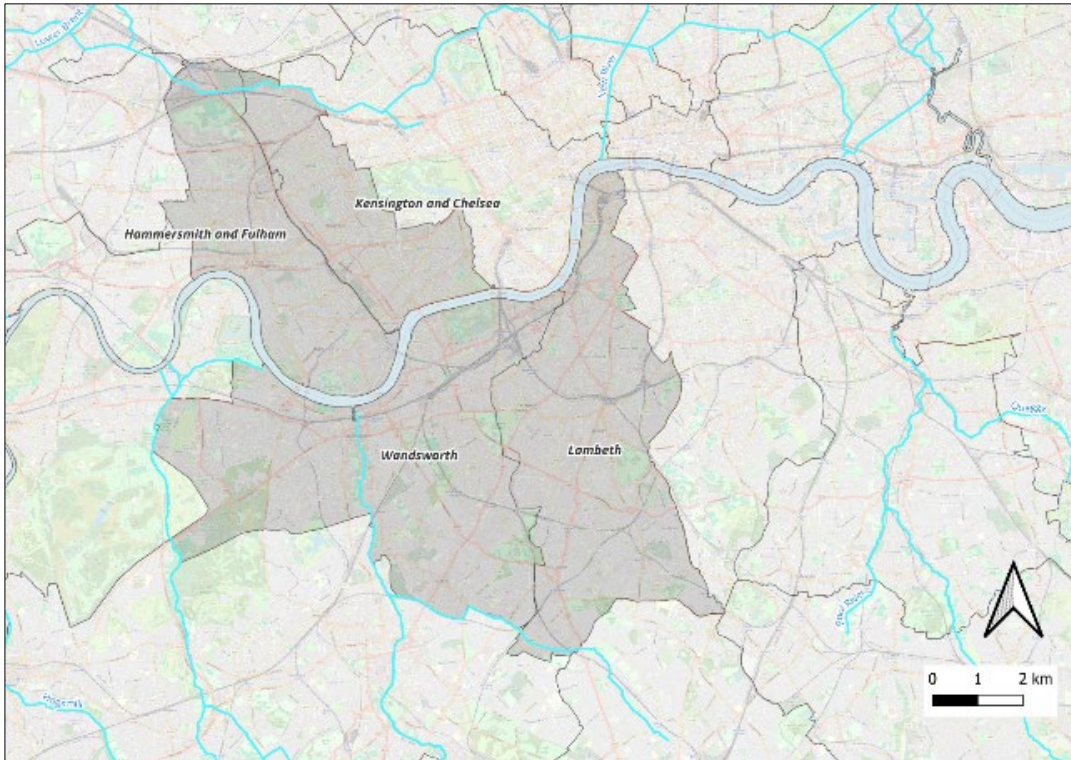
This Strategy defines a collective ambition for waste management services from 2025 to 2040 for the Western Riverside Partners – WRWA, London Borough of Hammersmith & Fulham, the London Borough of Lambeth, the Royal Borough of Kensington and Chelsea and the London Borough of Wandsworth (the Partner Authorities).

In the development of the strategy a full public consultation and engagement process was undertaken to better understand the needs of communities in the area, their views on resources and waste management and to gain feedback on future proposals. The public consultation was carried out for six weeks between Monday 4th September and Monday 14th October. During this period feedback was gathered via online focus groups, and an online survey. The full results of the consultation are published on the WRWA website strategy page.

It was also considered whether a Strategic Environmental Assessment (SEA) needed to be conducted and statutory consultees were engaged. The scope of the Strategy was considered against the criteria from the Practical Guide to SEA and the SEA Regulations. The SEA screening found that the Strategy is not likely to have any significant environmental effects, and therefore a full SEA was not required.

An Equalities Impact Assessment was also developed and has been updated following the public consultation.

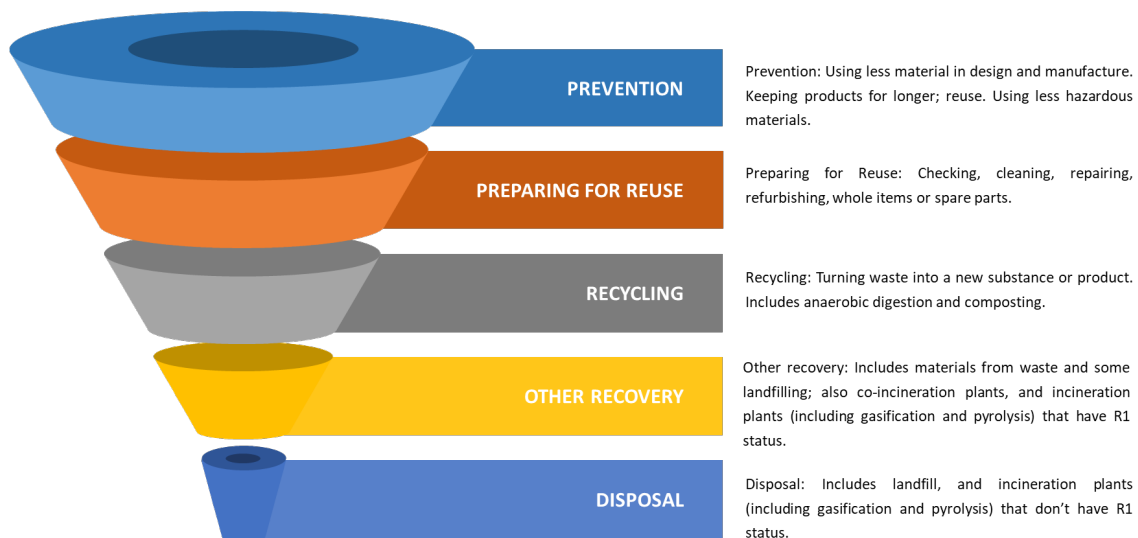
Figure 1: Western Riverside partners - Council areas



CONTEXT

The development of a Strategy provides an opportunity for the Partner Authorities to explore ways they can work together and with their local communities to deliver more sustainable resources and waste services, in accordance with national and regional policy and legislation. The strategy focuses on actions that align with the principles of the waste hierarchy. This includes prioritising ways to prevent waste, divert more materials for reuse, repair and recycling, and reduce the environmental impact associated with the generation and management of waste. Disposal is the last resort for waste.

Figure 2: The Waste Hierarchy



The Western Riverside Partners adopted a Joint Strategy and Waste Management Policy in 2006. In 2013, a new joint high-level Waste Management Policy was agreed with the Councils to guide future service provision and demonstrate continued partnership working. In 2017, it was decided

that a new Joint Waste Management Policy would be developed, to take account of new and proposed waste prevention initiatives. However, the development of significant new legislative and policy drivers by the UK Government, notably the publication of the Resources and Waste Strategy in 2018 and subsequent consultations, resulted in further consideration of the Joint Strategy. Following clarification of UK Government policy, the Western Riverside Partners took the decision to review, update and develop the Strategy to ensure it better reflects current needs and legislative requirements.

SUMMARY OF STRATEGY CONTENT

The aim of this Strategy is to provide a framework for the strategic management of resources and waste in the Western Riverside area, including setting targets and ambitions for performance improvements. To successfully deliver the targets and ambitions of this Strategy, the Partner Authorities need to review how they currently manage the waste generated in their area and identify any changes that may be needed in the future. To support the review, an analysis of different approaches has been investigated to help inform future decision making. This includes comparing different ways of doing things, looking at the experiences of other local authorities and understanding the potential impacts of how things could be done differently in the future. A summary of the review outcomes can be found in the supporting Technical Report.

The conclusions from the review have been used, together with our knowledge of the wider context of the boroughs within London, in order to set an achievable future vision for the Western Riverside Partners.

This Strategy is set out according to the following structure:

- **Introduction** - this chapter introduces the Strategy and its context and provides a summary of the content of this document
- **Why action is needed** - identifies the relevant drivers, targets and legislation in relation to this Strategy and what those mean for the Western Riverside Partners
- **Current Context in Western Riverside Partnership area** - presents the current context of the Western Riverside Partners, including local demographics, practical barriers, current services and performance and how these may change in the future due to variables such as household growth
- **Vision, Themes and Action** - sets out the vision of the Strategy together with the proposed approach to meeting the aligned targets, ambitions and actions
- **Monitoring Progress** - identifies how the actions outlined will be monitored

WHY ACTION IS NEEDED

SUMMARY OF KEY DRIVERS

This Strategy sets the strategic direction for resources and waste management over the next 15 years, from 2025 to 2040. The Western Riverside Partners recognise that to reach the ambitions for better waste management in the future, they will need to work as a collective to prevent waste, enhance resource efficiency and minimise greenhouse gas emissions.

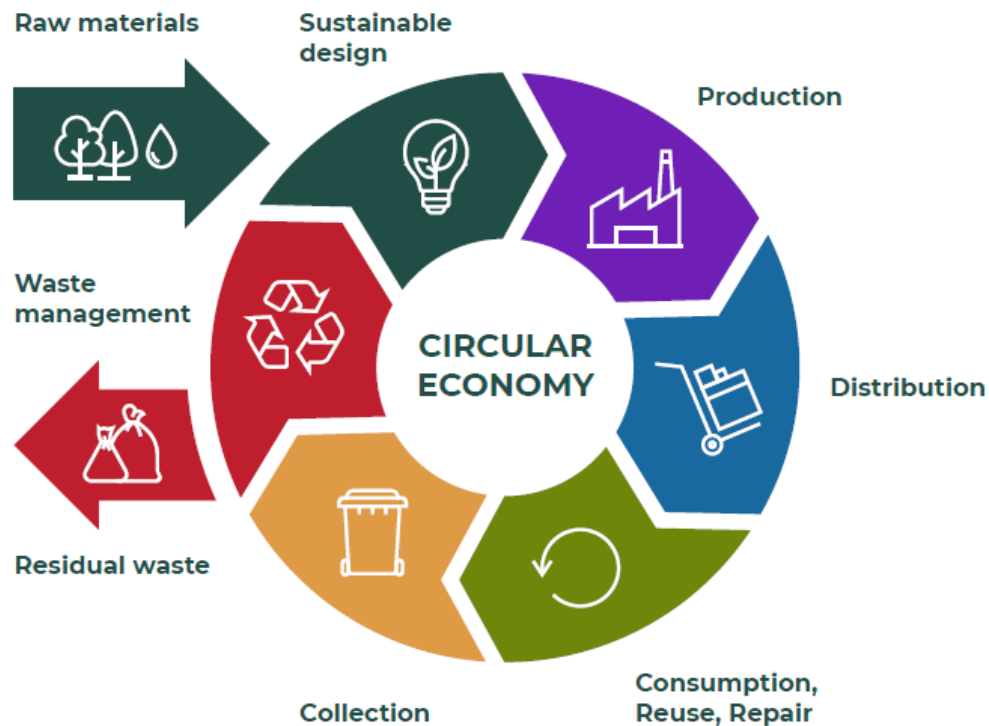
The main drivers, below, are described in more detail in the following sections:

- Environmental impacts
- Societal impacts
- National policy
- Local policy
- Affordability

ENVIRONMENTAL IMPACTS

In order to drive change, the Partner Authorities its residents and businesses will need to adopt Circular Economy thinking. The circular economy is a model of production and consumption, which involves sharing, reusing, repairing, refurbishing and recycling existing materials and products as long as possible to extend their lifespan. This provides a sustainable alternative to the traditional, linear economic model, which is based on a take-make-use-dispose pattern. Embracing the principles of the Circular Economy supports society in a transition from unsustainable levels of consumption and towards a model which values and conserves our natural resources.

Figure 3: The Circular Economy



SOCIETAL IMPACTS

There is growing concern throughout society about climate change and our impact on the environment. An increasing number of people are now aware of how the types of products we purchase and consume ultimately end up as waste, leading to loss of materials that could be used again, and production of greenhouse gas emissions which contribute to global warming. The public are beginning to adopt lifestyle changes that help to minimise their environmental impact, such as reducing food waste and incorporating reusable cups and containers.

There is also growing public interest in how brands, retailers, other organisations and the Government can support their individual efforts through reducing the amount of single-use packaging on the market, minimising plastic pollution, and creating products which are designed to last. New policies that focus on the principles of the waste hierarchy and circular economy, along with pressure from consumers, are driving innovation and change in manufacturing and retailing, leading to new technologies for managing waste products.

It is important that the Partner Authorities' waste services respond to these changing trends, attitudes and behaviours.

NATIONAL POLICY

In the next few years, the UK Government plans to implement schemes which will change the way in which waste is currently managed, which will lead to significant changes for local authorities.

The Resources and Waste Strategy 2018

The Resources and Waste Strategy was released in 2018 to outline the UK Government's plans for minimising waste, promoting resource efficiency and moving towards a circular economy – i.e. minimising waste and promoting a sustainable use of natural resources, through smarter product design, repair, reuse and recycling to keep products in the in use for longer.

The Resources and Waste Strategy includes the following targets:

- recycling at least 65% of municipal waste by 2035;
- no more than 10% of municipal waste ending up in landfill;
- zero avoidable waste by 2050;
- zero plastic waste by 2042; and,
- zero food waste to landfill by 2030.

The Resources and Waste Strategy put forward the following initiatives:

Simpler Recycling: a requirement for the separate collection of each of the major dry recycling materials (paper, card, glass, metal cans and plastics) and food waste from households and all appropriate businesses.

Extended Producer Responsibility (EPR) for packaging: manufacturers will pay the full costs of managing and recycling their packaging waste, with higher fees being levied if packaging is harder to reuse or recycle.

Deposit Return Scheme (DRS): for plastic and metal drinks containers, where consumers will be financially incentivised to return their used containers for recycling.

The Environment Act 2021

The Environment Act 2021 passed into UK Law in November 2021. The Act contains several provisions for secondary legislation including EPR, DRS and Simpler Recycling which have been undergoing consultation.

The implications of these policy proposals for the Western Riverside Partners and the potential changes required to the current collection, management and disposal services for local authority collected waste (LACW) are set out below.

Simpler Recycling

The Environment Act 2021 sets out the materials that are required to be collected by all WCAs:

- **Glass bottles and containers** – including drinks bottles, condiment bottles, jars
- **Paper and card** – including newspaper, cardboard packaging, writing paper (but excluding disposable paper cups as these items are largely consumed 'on-the-go' or away from home)
- **Metal packaging** – steel and aluminium tins and cans
- **Plastic bottles** – including clear drinks containers, high-density polyethylene (HDPE; e.g. milk containers), detergent, shampoo and cleaning products
- **Food waste** – to be collected from all households by March 2026

The UK Government has proposed that some additional material streams are included in the dry recyclable waste streams, such as plastic pots, tubs and trays, food and drink cartons which are already collected by the Councils, and items which are currently not, such as textiles, batteries, plastic film and waste electricals.

In November 2023, Defra recognised that co-mingled collections are an acceptable collection methodology in line with the Environment Act (2021)'s legislative requirements. This is how the Partner Authorities collect and manage dry mixed recyclable materials from residents and businesses.

Under the new requirements:

- Co-mingled collection of dry recyclables is allowed (households and businesses).
- By 31st March 2026, all local authorities in England must collect the same recyclable waste streams for recycling or composting from households. The recyclable waste streams include paper and card, plastic, glass, metal, food waste, and garden waste.
- All non-household municipal premises in England (such as businesses, schools and hospitals), must make arrangements to have the same set of recyclable materials (with the exception of garden waste) collected for recycling or composting.
- Weekly food waste collections must be in place by 31st March 2026 from all households (with anaerobic digestion the preferred treatment option).
- Weekly food waste collections from all appropriate businesses must be in place by 31st March 2025, although not necessarily collected by Council-run collection services.
- Recyclable plastic film to be collected by 31st March 2027 (households and businesses).
- Cartons for food, drink and other liquids to be collected by 31st March 2026 (households and businesses).
- Garden waste collections must be offered by all councils (by 31st March 2026) – but can still be charged for.

At the time of writing this strategy (April 2024), Defra are currently seeking views on statutory guidance including service standards for collection arrangements and frequency. The consultation states that Defra *“will consider whether a recommended minimum service standard of alternate weekly collection for residual waste (alongside weekly food waste collection) might be appropriate, subject to an assessment of affordability and value for money”*. This proposal is subject to consultation with local authorities and will be confirmed in the statutory guidance. Defra have confirmed that a consultation on Statutory Guidance will be issued in the near future.

Extended Producer Responsibility

Extended Producer Responsibility (EPR) is a policy approach, designed to shift the responsibility for managing and financing the handling of post-consumer waste from local authorities (and therefore taxpayers) to producers. The current EPR proposals are focused on packaging, although in future it is expected that this policy approach may also be implemented to other waste types. The packaging EPR framework aims to encourage packaging producers to take greater responsibility for the environmental impact of their products throughout their lifecycle, including the end-of-life stage. EPR will work on the ‘polluter pays’ principle and is likely to be implemented through fiscal incentives.

Under the packaging EPR system, producers are required to take specific actions to minimise the environmental impact of their products, such as reducing waste, increasing the recyclability of packaging, and promoting eco-design principles. This includes placing the financial responsibility for the collection, processing, and disposal of the products once they become waste.

EPR is a policy approach through which producers are responsible for a product throughout its lifecycle, including post-use. The EPR scheme for packaging is designed to incentivise producers in designing products which make it easier for them to be reused, repaired or recycled, moving waste up the hierarchy.

The UK Government’s response to the Extended Producer Responsibility consultation was published in March 2022. The response confirmed the original consultation proposal that *“Payments to local authorities for the cost of managing packaging waste generated by households, both packaging waste that is collected for recycling and packaging waste disposed of in residual waste, will be made under the packaging Extended Producer Responsibility scheme”*. The amount of money available to Local Authorities to deliver efficient and effective recycling services will be confirmed in November 2024

EPR is set to be implemented from October 2025. Local authorities are likely to begin to see a reduction in overall volumes of packaging waste as well as a change in formats of packaging that are easier to reuse and/or recycle, helping to reduce waste and boost participation in recycling from residents.

Deposit Return Scheme

The Deposit Return Scheme (DRS) proposal is a system designed to encourage the return and recycling of beverage containers, such as bottles and cans. The proposed scheme involves charging a small deposit fee on each container at the point of purchase, which is refunded to the consumer when they return the empty container to a designated collection point.

The main objective of DRS is to reduce litter, increase recycling rates, and promote a circular economy by incentivising consumers to return their containers for closed loop recycling.

The scheme aims to create a financial incentive for individuals to participate in recycling efforts and ensure that containers are not discarded in the environment. The scheme aims to ensure that 85% fewer drinks containers are discarded as litter after three years following launch.

In January 2023, Defra published its response to the latest round of consultations on the DRS. Defra confirmed the ability for local authorities and waste operators to redeem deposits on items collected through kerbside collection systems, separated and returned to the scheme. Following announcements in late April 2024 the scheme for England, Wales and Northern Ireland will be delayed until 2027.

With high levels of participation for DRS, the amount of drinks cans and plastic bottles entering kerbside collections and street litter bins should fall significantly. Along with overall reduced volumes of packaging through EPR, this has the potential to impact the volume of material required for collection and processing, which in turn may impact on fleet efficiency and contractual arrangements through the waste transfer stations (WTS) and the materials recovery facility (MRF). It is therefore important to factor these potential changes into any future strategy.

Circular Economy Package 2020

In 2020, the UK approved its own Circular Economy Package (CEP), implementing many of the measures adopted by the European Commission to deliver circular economy led improvement measures in waste management across the EU. Key proposals were transposed into UK law through amending existing waste management legislation, particularly the Waste Framework Directive, the Landfill Directive, the Packaging and Packaging Waste Directive and the various pieces of legislation pertaining to End-of-Life Vehicles (ELV), and batteries collection, treatment and disposal.

The CEP recommitments the UK to mandatory recycling targets, transposed into law through the Waste Framework Directive. These include:

- 55% municipal re-use and recycling target by 2025;
- 60% municipal re-use and recycling target by 2030; and
- 65% municipal re-use and recycling by 2035

The CEP introduces *“a revised legislative framework, identifying steps for the reduction of waste and establishing an ambitious and credible long-term path for waste management and recycling”*. This includes strengthened provisions on waste prevention, specific food waste prevention (Articles 9 & 29), and preparing for re-use (Article 11(1)), again legislated through the Waste Framework Directive.

Environmental Improvement Plan 2023

The 25 Year Environment Plan was adopted in 2018, setting out the UK Government’s 10 environmental goals, focussing on biodiversity, clear air, clean water, protecting wildlife, reducing Environmental Hazards, minimising waste and combatting climate change. The Environmental Improvement Plan was released in February 2023, to review the goals of the 25-Year Environment Plan 2018 and set out further plans for delivering those goals.

The plan outlines a number of interim, non-statutory targets that underpin the waste reduction target to halve residual waste produced per person by 2042. This includes the following interim targets by 31 January 2028:

- Reducing total residual waste (excluding major mineral waste) to 437 kg/capita per year maximum
- Reducing municipal residual waste to 333 kg/capita per year maximum
- Reducing municipal food waste to 64 kg/capita per year maximum
- Reducing municipal plastic waste to 42 kg/capita per year maximum
- Reducing municipal paper and card waste to 74 kg/capita per year maximum
- Reducing municipal metal waste to 10 kg/capita per year maximum
- Reducing municipal glass waste to 7 kg/capita per year maximum

Carbon reduction targets

In 2019, the UK Government became the first major economy in the world to set a legally binding target to achieve Net Zero Greenhouse Gas (GHG) emissions from across the UK economy by 2050. Through the Climate Change Act, the UK Government is committed by law to reducing GHG emissions by at least 100% of 1990 levels (net zero) by 2050.

In 2019, the Councils each declared the ambitious target of achieving net zero emissions by 2030. Lambeth Council was the first London Borough to declare a climate emergency in response to the threat of global warming.

In July 2023, the UK Government published their intention to include energy from waste (EfW) facilities in the UK Emissions Trading Scheme (ETS) from 2028. This was in response to the Climate Change Committee's 2021 progress report which stressed that the Government needs to address emissions from EfW. The inclusion of EfW in the UK ETS will take effect from 1st January 2028 and it is anticipated that it will support the UK Government's target to halve residual waste arisings per capita by 2042 (from 2019 levels).

The UK Government is currently exploring new ways to monitor the performance of resources and waste management. This could include a move away from weight-based performance metrics (such as tonnage-based recycling rates) and towards impact-based targets and reporting, focusing initially on carbon and natural capital accounting (i.e. value of available natural resources). The benefit of this is to remove an incentive for the recycling of heavier materials over those that may offer greater environmental benefits through recycling. It is important therefore for the Partner Authorities to work together to develop suitable measuring and monitoring frameworks for the Strategy so that the impacts of resources and waste management can be appropriately reported at a local level.

REGIONAL POLICY

The Mayor of London is required by the Greater London Authority (GLA) Act 2007 to produce a municipal waste management strategy for London. Since 2018 this requirement has been fulfilled through the London Environment Strategy (LES)¹, the first integrated environment strategy for London.

The LES is based on four main objectives for waste:

- To reduce waste and the use of single-use packaging;
- To ensure valuable resources are kept in use for as long as possible through reuse or recycling;

¹ [London Environment Strategy | London City Hall](#)

- To maximise the availability of recycling facilities and reuse services to ensure there is enough infrastructure in London to support the shift towards a circular economy;
- To make the most of those materials that can't be reused or recycled, by using them to generate low carbon energy.

Within the LES, the Mayor has set targets for the consistent collection of certain material streams, landfilling and recycling of municipal waste and reduction in food waste. These have been set at a London-wide level and the Mayor has chosen not to set individual waste management targets for individual boroughs, instead expecting each of them to provide consistent collection services to residents and continually improve performance to contribute to London-wide targets.

The LES sets the ambition for London to be a zero-waste city, sending no biodegradable or recyclable waste to landfill by 2026 and achieving a 65% municipal waste recycling rate by 2030. As an interim target the Mayor expects waste authorities to collectively achieve a LACW (i.e. all waste collected by local authorities) recycling target of 50% by 2025. Authorities should also make a fair and proportionate contribution to the collective target of 45% household waste recycling rate by 2025 and 50% household waste recycling rate by 2030.

The LES also sets out that by 2020 all London boroughs should collect the six main dry recyclables (glass, cans, paper, card, plastic bottles and mixed rigid plastics (tubs, pots and trays)) from all households. A separately collected weekly food waste collection service should also be provided, including from flats where practical and cost effective. It is noted that more support and funding is needed to increase recycling performance in flats.

With regard to food waste reduction, the Mayor has set a target to reduce food waste by 20% per person by 2025 in line with the Courtauld Commitment and by 50% by 2030, in line with the United Nations Sustainable Development Goal (SDG) 12.3².

The LES also has a strong focus on the reduction in single use plastic waste and the Mayor has installed drinking fountains and supported other initiatives to reduce single use water bottles across the city.

Each London borough is expected to demonstrate, through their Waste Reduction and Recycling Plans (RRPs)³, their actions for cutting waste and boosting recycling and contributing to London's overall performance over a four-year period. The RRP's are used to drive and promote local activity and are individually approved by the Mayor. The current RRP's focus on a two-year period from April 2023 to the end of March 2025, with authorities expected to continue to work on their identified RRP actions until a new RRP is approved.

The GLA has developed the emissions performance standard (EPS) to assess the GHG emissions associated with the collection, treatment, energy generation, and final disposal of LACW. Meeting the EPS is best achieved by:

- reducing waste and increasing reuse
- maximising recycling rates, targeting materials with high embodied carbon (plastics, metals, and textiles)
- generating low carbon energy from organic waste (for example anaerobic digestion of food waste)

² UN Sustainable Development Goals, [Goal 12: Ensure sustainable consumption and production patterns](#)

³ [Waste Reduction and Recycling Plans \(RRPs\) - London Datastore](#)

- using waste derived fuels (as a transition fuel) and other low CO₂ transport options
- making sure only truly non-recyclable waste is going for energy generation; and
- avoiding landfill

Boroughs are asked to report this on progress within their RRP updates but no specific targets are set within the LES for GHG reduction associated with waste management. In addition, a minimum carbon emissions performance standard has been set to help decarbonise London's energy supply through incineration of non-recyclable waste.

In 2022, the GLA released a report *Analysis of a Net Zero 2030 Target for Greater London*⁴ to reflect the growing national ambitions for tackling climate change. In the report, the Mayor commits to a net zero target for London for 2030, bringing forward the original deadline of 2050 set by the *Zero Carbon London: A 1.5°C Compatible Plan*⁵ in 2018.

AFFORDABILITY

Partner Authorities recognise the importance of delivering the waste collection and treatment services in the most cost-effective way. The key to providing an affordable service is through the prevention of waste altogether. This reduces the cost of collecting waste and the processing and treatment fees paid by the Western Riverside Partners to its contractors. Alternatively, diverting more materials for repair and reuse will provide economic benefit.

Without changing current operations or behaviours, the increase in households will lead to **more waste** produced in the future, which will continue to drive up costs. It is therefore imperative that Western Riverside Partners, residents and businesses implement the principles of the waste hierarchy to reduce pressure on future council budgets and therefore its taxpayers.

⁴ Element Energy (for GLA), 2022, [Analysis of a Net Zero 2030 Target for Greater London](#)

⁵ GLA, 2018, [Zero Carbon London: A 1.5°C Compatible Plan](#)

CURRENT CONTEXT IN WESTERN RIVERSIDE PARTNERSHIP AREA

LOCAL AREA AND DEMOGRAPHICS

Demographics and the nature of the local area are important factors in understanding the current context for resource and waste management, and to help define future strategic aims and what may be possible. This is because data and research consistently demonstrate trends in waste management performance which are linked to key attributes such as how urbanised or rural an area is, or the demographics of a population. For example, areas that are very densely populated often have fewer gardens, meaning lower amounts of garden waste collected which can then result in lower recycling rates as garden waste collected for compost counts towards recycling figures (and generally weighs more than other recyclables like paper and plastic, which means it accounts for a larger proportion of the weight of the waste).

Understanding the specific context of the area enables the Western Riverside Partners to set realistic but ambitious targets and ambitions for improving their waste and resources management services within their own specific limitations.

The Western Riverside Area i.e. the London Boroughs of Hammersmith & Fulham, Lambeth and Wandsworth and the Royal Borough of Kensington and Chelsea have a combined population of 975,000⁶, with 496,000 households covering an area of 35 square miles, making it one of the highest population density areas in England with around 29,000 people per square mile. Of these households, 75% reside in flats, maisonettes or apartments and it is therefore unsurprising that the Partner Authorities are among the most densely populated boroughs in London.

The area consists of a diverse mix of cultures and backgrounds, with some extremely affluent areas intertwined with areas of high poverty and social housing.

Further details on deprivation, occupancy rates for bedrooms and household composition, economic activity, ethnicity and household tenure across the Western Riverside Partners and in comparison to London can be found in Appendix 2

PRACTICAL BARRIERS AND LIMITATIONS

A number of studies have identified common barriers to recycling, many of which are applicable to the Western Riverside area. Within the WRAP (The Waste and Resources Action Programme) Barriers to Recycling at Home⁷ study the following universal barriers were identified:

Situational barriers – including not having adequate containers, a lack of space for storage, unreliable collections, unable to get to bring sites;

- Lack of space for storage within a property is a common challenge for those residents living in flats or in Houses of Multiple Occupancy (HMOs)

Behaviour – for example household disorganisation, being too busy with other preoccupations, difficulties in establishing routines for sorting waste and remembering to put it out on collection day;

- Examples of behavioural barriers include putting things in the recycling even if the resident is unsure it can be recycled, which can cause contamination of the recycling

⁶ [ONS 2022](#)

⁷ [Barriers to recycling at home | WRAP](#)

Lack of knowledge – such as knowing what materials to put in which container, and understanding the basics of how the scheme works; and

- High levels of transience (residents moving often), combined with a lack of information provided to tenants about services, can limit recycling

Attitudes and perceptions – such as not accepting there is an environmental or other benefit, resistant to householder sorting, and not getting a personal motivational reward from recycling.

- Ease of throwing everything into one bin combined with not having anywhere to store recycling can limit recycling

WRAP's Recycling Tracker⁸ (Spring 2023) identifies that age profiles and home ownership affects recycling rates. Residents between 18-35 record lower rates of recycling, and home owners tend to recycle more than people who rent their homes.

ReLondon has produced a report about recycling in flats⁹, which noted that people who live in these types of property recycle much less than those who live in houses.

However, despite the barriers identified, the Western Riverside Partners aspire to improve recycling rates in the future with the support of the community and businesses.

The Partner Authorities have identified measures that they will adopt to reduce waste, maximise recycling and reduce their environmental impact within their RRP.

Key collaboration areas such as the standardisation of the waste collection system and the management of food and garden waste have been considered for the Partner Authorities.

As the Partner Authorities currently provide different collection schemes and as each Partner Authority has its own unique make-up of properties leading to differing constraints, it is noted that changes towards standardisation in current collection schemes are not practicable in some areas. For example, in households with a high level of deprivation, more challenging behaviour is typical with regard to recycling as sorting waste is not a high priority compared to putting food on the table.

Due to space limitations in parts of each of the Boroughs, particularly in areas with narrow streets and flat housing types, there is a lack of space for larger household and/or communal containers to be stored, which leads to a preference for more frequent collections to avoid the presence of overfilled containers and/or side waste on the residential streets. Likewise, these constrained properties are less likely to have the space needed to store food waste containers – either a smaller internal container or the larger external caddy – and they are less likely to have a need for garden waste collection or space to store a garden waste container or sacks.

In addition, typically poor performance observed in flats means recycling performance in the Western Riverside area is likely to be lower when compared to areas with more street-level houses. However, there will be a need to provide food waste collections and garden waste collections under the Simpler Recycling initiative – this will mean that food waste collections will need to be rolled out or expanded in to all properties (including flats) and garden waste collections will need to be introduced in Hammersmith & Fulham and Wandsworth.

⁸ [Recycling Tracker survey: Spring 2023 | WRAP](#)

⁹ [Report - Making recycling work for people in flats - ReLondon](#)

The nature of Inner London Boroughs, means that there are many narrow streets with heavy traffic to contend with. This makes it a priority to use services in these areas that will not cause further congestion. In some cases, this might limit the size of collection vehicle that is able to access certain areas.

While the Western Riverside Partners are keen to encourage behaviour change through initiatives such as reuse projects, it is noted that the current Smugglers Way and Cringle Dock WTS facilities are very much constrained in terms of space for these, both being bordered by the River Thames to the north, a road to the south and other occupied residential developments to the east and west.

Likewise, finding additional space will be extremely challenging due to the high population densities and lack of available land, unless there are opportunities to work with businesses/initiatives that already exist within the area.

All of the potential barriers and limitations set out in this section have been considered as part of this Strategy and have informed the ambitious, but realistic targets developed for the Western Riverside Partners.

CURRENT SERVICES

The Western Riverside Partners are responsible for collecting around 370,000 tonnes of municipal waste per annum (2022/23) through household and commercial collections and receipt of items at the Household Waste and Recycling Centre (HWRC) at Smugglers Way Waste Transfer Station (WTS) in Wandsworth. A second WTS is situated at Cringle Street in Battersea. Lambeth Council also has a dedicated Reuse and Recycling Centre for its residents at Vale Street¹⁰.

Under current contractual arrangements, in place until 2032, all co-mingled dry recycling collected is handled through the Materials Recycling Facility (MRF) located at Smugglers Way Waste Transfer Station (WTS). Any non-recyclable waste is processed at the Riverside Resource Recovery Limited (RRRL) Energy-from-Waste (EfW) Facility in Belvedere. The waste is compacted into containers and transported to the site from the transfer stations by the river on barges. This provides a low emission method of transporting waste which helps to reduce traffic congestion and air pollution.

Figure 4: A barge transporting waste from WRWA to the EfW



¹⁰ [Reuse and recycling centres | Lambeth Council](#)

Collections

In the financial year **2022/23**, approximately 287,000 tonnes of household waste was collected at the kerbside. Of this, around 65,000 tonnes (or 23%) were sent for recycling or composting through the various dry recycling, garden waste and trial food waste collection schemes.

Each Partner Authority provides its own collection system. The table below provides a summary of the standard household collection schemes for residual waste, dry recycling, food waste and garden waste in each of the Councils in 2022/23.

Table 1: 2022/23 Household Waste Collection Configurations of WRWA Partner Authorities

Authority	Residual waste		Dry recycling		Food waste		Garden waste	
	Scheme	Frequency	Scheme	Frequency	Scheme	Frequency	Scheme	Frequency
Hammersmith & Fulham	Sack collections	Weekly	Co-mingled	Weekly	Prototype scheme (~6000 properties)	Weekly	N/A	N/A
Kensington and Chelsea	Sack collections	Twice-weekly	Co-mingled	Twice-weekly	Prototype scheme (~6000 properties)	Weekly	Chargeable (£75.90/yr)	Fortnightly
Lambeth	Wheeled bin collections	Weekly	Co-mingled	Weekly	Co-collected with Garden Waste	Weekly	Chargeable (£75.80/yr)	Weekly
Wandsworth	Sack collections	Weekly	Co-mingled	Weekly	Prototype scheme (~2000 properties)	Weekly	N/A	N/A

Several schemes have changed this year (2024), including Lambeth moving to an alternate weekly collection of residual waste.

In 2022/23 only Kensington and Chelsea and Lambeth provided a garden waste service on a charged basis, although in July 2024 Hammersmith & Fulham will also be starting a garden waste collection service.

Waste Composition

A waste composition analysis was conducted on the collected residual waste sacks/bins in 2022, illustrating the typical make-up of waste thrown away by residents across the area (Table 2).

Disposing of residual waste cost more than recycling so it's important to understand what's in the residual waste bin that could be recycled.

The analysis found that food waste comprises nearly 40% of the bin. Of the remaining items, approximately 25% comprised of items which could have been recycled either through the dry recycling and garden waste collection schemes from home, or through the HWRC (6% paper and card, 4% plastics, 4% glass, 4% textiles, 1% WEEE and 6% garden waste). 6% of the residual waste stream is currently made up of plastic films, which are not currently accepted through the dry recycling collection scheme, and 30% made up of other general waste such as nappies, tissues and smaller fractions.

Table 2: Average Waste Composition across the Western Riverside Partners

Category	Average composition across boroughs
Paper & card	5.9%
Dense plastic	3.7%
Plastic films	6.2%
Glass	3.5%
Metal	0.6%

Category	Average composition across boroughs
Textiles	4.0%
WEEE	0.6%
Garden waste	5.7%
Food waste	39.4%
Other (residual) waste	30.3%

CURRENT INITIATIVES

Alongside the delivery of collection treatment and disposal services the Western Riverside Partners deliver a wide range of initiatives to reduce waste, facilitate reuse, encourage repair, boost recycling and support the transition to a more circular economy. Initiatives are delivered locally by individual Councils or collectively as partners.

Supporting the Circular Economy

The circular economy is a system where materials never become waste and nature is regenerated. In a circular economy, products and materials are kept in circulation through processes like maintenance, reuse, refurbishment, remanufacture, recycling, and composting.

The four Partner Authorities each produce RRP, to support the Mayor of London's strategies. These explain how they will prevent waste, increase reuse and improve recycling, supporting the transition to a more circular economy. The actions included within the RRP will contribute to the goals and targets in the London Environment Strategy.

Examples of initiatives to prevent waste include:

- Home composting schemes – to promote reducing waste at source by offering subsidised home composting bins to residents through the 'Get Composting' scheme.
- Real nappies schemes – providing residents with free and discounted reusable nappy vouchers to promote the use of reusable nappies.
- Library of Things – a place where you can borrow useful household items for DIY, such as tools, cleaning equipment, gardening implements, events equipment, entertainment and more for a small hire fee per day.
- Contributing to London Councils One World Living (OWL) programme¹¹ – a collaborative scheme for local authorities within London to change residents' attitudes around sustainability, with a goal to reducing London's consumption emissions by two thirds by 2030. The programme focusses food, textiles, electricals and plastics.
- Developing Circular Economy Strategies to support the Councils, residents and businesses adopt and embed circular activities.

Residents are also encouraged to donate good quality items for reuse. Local outlets and organisations including Emmaus¹², Traid¹³ and British Heart Foundation¹⁴ are signposted on the Partner Authorities' websites as well as online platforms such as Freegle and Gumtree. Residents can also bring items to the HWRC located at Smugglers Way and deposit them in the reuse space where they can be accessed by the ReWork reuse project.

¹¹ [One World Living | London Councils](#)

¹² [Donate goods - Emmaus UK | recycle your unwanted furniture](#)

¹³ [Book a Free Clothes Collection to Donate to Charity Retailer TRAIID](#)

¹⁴ [Book a free furniture and electrical goods collection near me - BHF](#)

The ReWork reuse project



The 'ReWork' reuse project¹⁵ was established at Smugglers Way Transfer Station in 2011, following a successful funding application submitted to the London Waste and Recycling Board (LWARB) and in partnership with Cory Riverside Energy. A workshop is based on site that is used to refurbish and test reusable large electrical appliances, bicycles and other household goods.

The project provides affordable items for people who need them and back-to-work opportunities for people who are long-term unemployed – delivering social value. It encourages the reuse of most easily reusable, repairable or recyclable bulky items which should be in good condition or in a repairable state.

It's operated by Groundwork London and with the support of WRWA and Cory, delivers three aims:

- Refurbishing and reusing unwanted domestics items, particularly white goods.
- Providing training and paid work experience to disabled and long term unemployed local people. There are now fifteen full-time members of staff in post and six trainees on waged work experience.
- Providing high quality affordable large electrical appliances to low-income families.

Reusable items are distributed through a wide variety of London charities and it is this access to a large number of varied outlets that is one of the major strengths of the scheme and what sets it apart from others.

In 2022/23, 4,500 electrical items were refurbished in the workshop including washing machines, fridges, cookers, microwaves and other household electrical goods. These appliances that would have been scrapped, recycled or sent to landfill, are returned to full working order and given a second life.

Education programme

The Western Riverside Partners place great importance on education, and deliver a range of behaviour change activities encouraging residents to recycle more and waste less. Education specific activities are delivered on site at the Smugglers Way Visitors Education Centre or as part of a schools outreach programme, which include:

- Free class trips for Key Stage 1 and above

¹⁵ [Reuse Workshop - WRWA](#)

Pupils and staff groups from the Western Riverside Partners are able to visit the Waste Education Centre to see what happens to their waste and recycling and learn the importance of the 3 R's – Reduce, Reuse and Recycle. Visitors can observe the unloading of collection lorries, see the cranes which lift containers of waste onto barges on the Thames, watch the machine sorting of recyclables and meet the composting worms.

- Adult group tours

Open to residents and businesses of the Western Riverside area, tours of the Smugglers Way site are provided with regular free daytime tours running throughout the year on request.

Online resources are also available including:

- Food waste reduction in schools - A series of resources are available online to support schools with tackling food waste, including ideas for engaging children in reducing their food waste and support with setting up 'cook-to-order' systems.
- Home learning - WRWA's website provides worksheets for Key Stage 1 and 2 to learn about reducing, reusing and recycling their waste.

Supporting Education

The education officers have responsibility for using the Visitors Education Centre to host and conduct educational talks and tours for schools, colleges, community groups, residents' associations and other interested parties based in the Western Riverside area, with particular emphasis on the three R's and the importance of recycling correctly. Their responsibilities also include the promotion of these education services and outreach work in schools within the area.

By the end of the 2022/23 school year 114 class visits had been hosted at Smugglers Way and 31 in-school workshops had been provided. In addition to their work with schools, the Team also worked with local residents, community groups and universities and the Team have continued to run regular visits to site. In 2022/23, there were 24 on-site adult tours and three off-site visits.



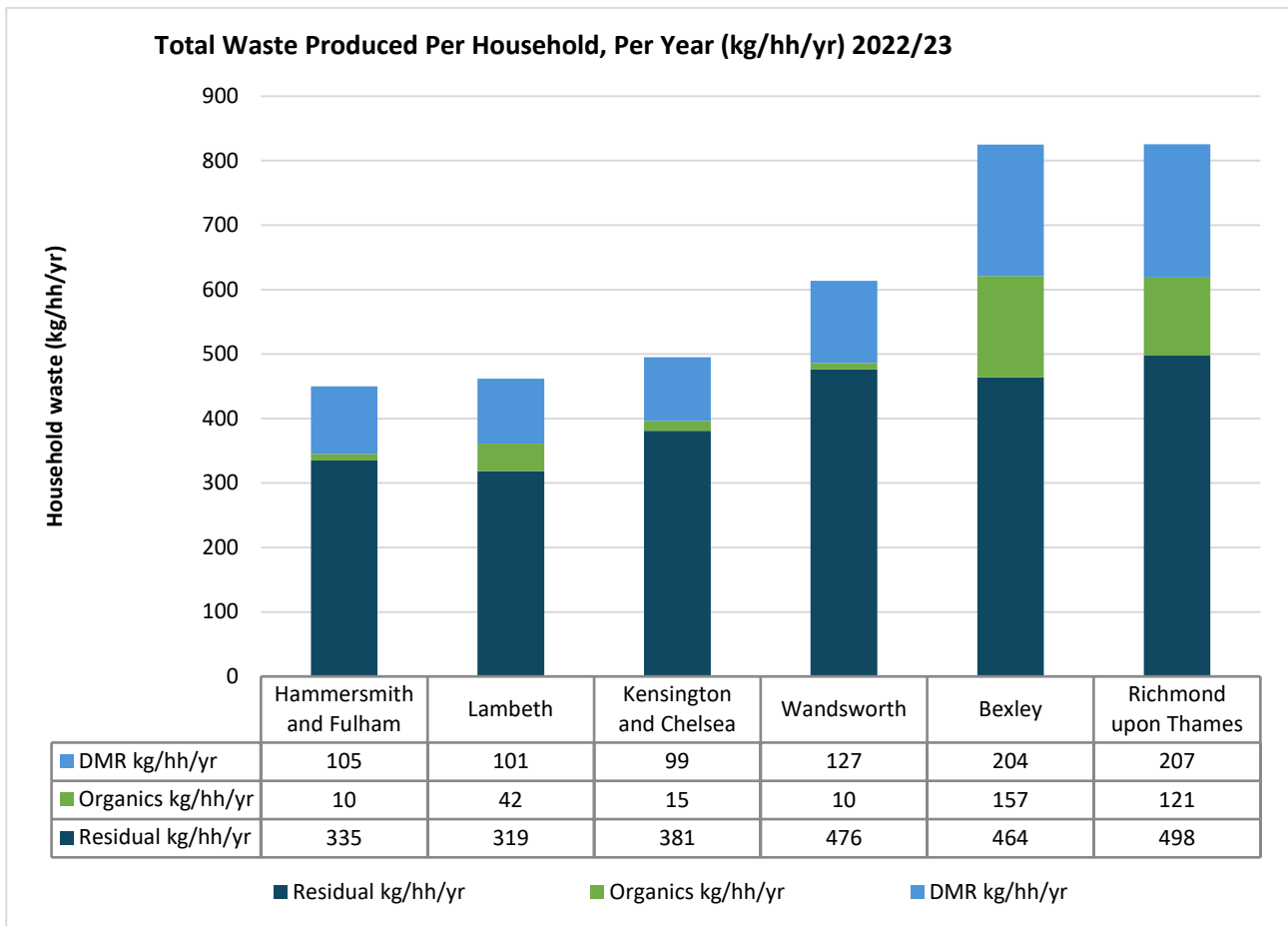
CURRENT PERFORMANCE

Leading the way

The Western Riverside Partners are leading the way on reducing residual waste. There has been a steady decline in residual waste collected per household, falling from 462.9 kg/hh/yr in 2018/19 to 408.5 kg/hh/yr in 2022/23. This is amongst the **lowest level of waste generation** of all local authorities in England and in terms of the waste hierarchy is the best possible approach to managing waste.

Figure 5 below, shows the lower levels of residual waste arisings compared to two outer London Boroughs where gardens are more plentiful and garden waste is collected.

Figure 5: Total Waste Produced Per Household, Per Year (kg/hh/yr)



The Western Riverside Waste Authority had a household recycling rate of 24.3% in 2022/23, placing it collectively in 334th place out of 343 English local authorities. The collective recycling rate is significantly below England’s average of 43.3% and the lowest among the London joint waste disposal authorities; West London Waste Authority (36.1%), East London Waste Authority (31.0%) and North London Waste Authority (30.6%) for the same year.

In the past five years, recycling rates across England have declined slightly, including in London, but the Western Riverside Partners remain comparable with other London local authorities (Figure 6) for dry mixed recycling, featuring in the top 50% overall and amongst the best inner London boroughs. Performance improvements could be made on organics in terms of food waste, but as previously discussed garden waste contributions are reliant on households having gardens and 75% of households in the areas are flatted properties.

Figure 6: 2022/23 Recycling Rates for dry recycling and organics, London Authorities

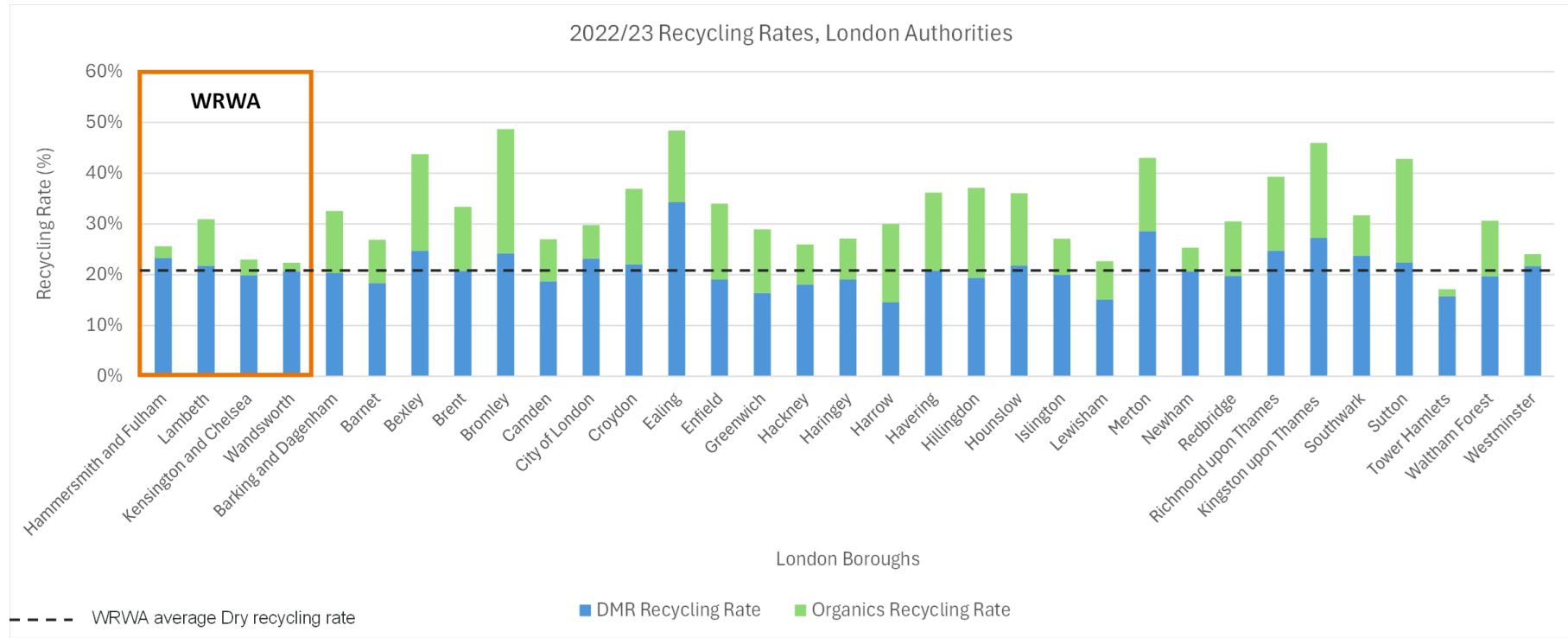
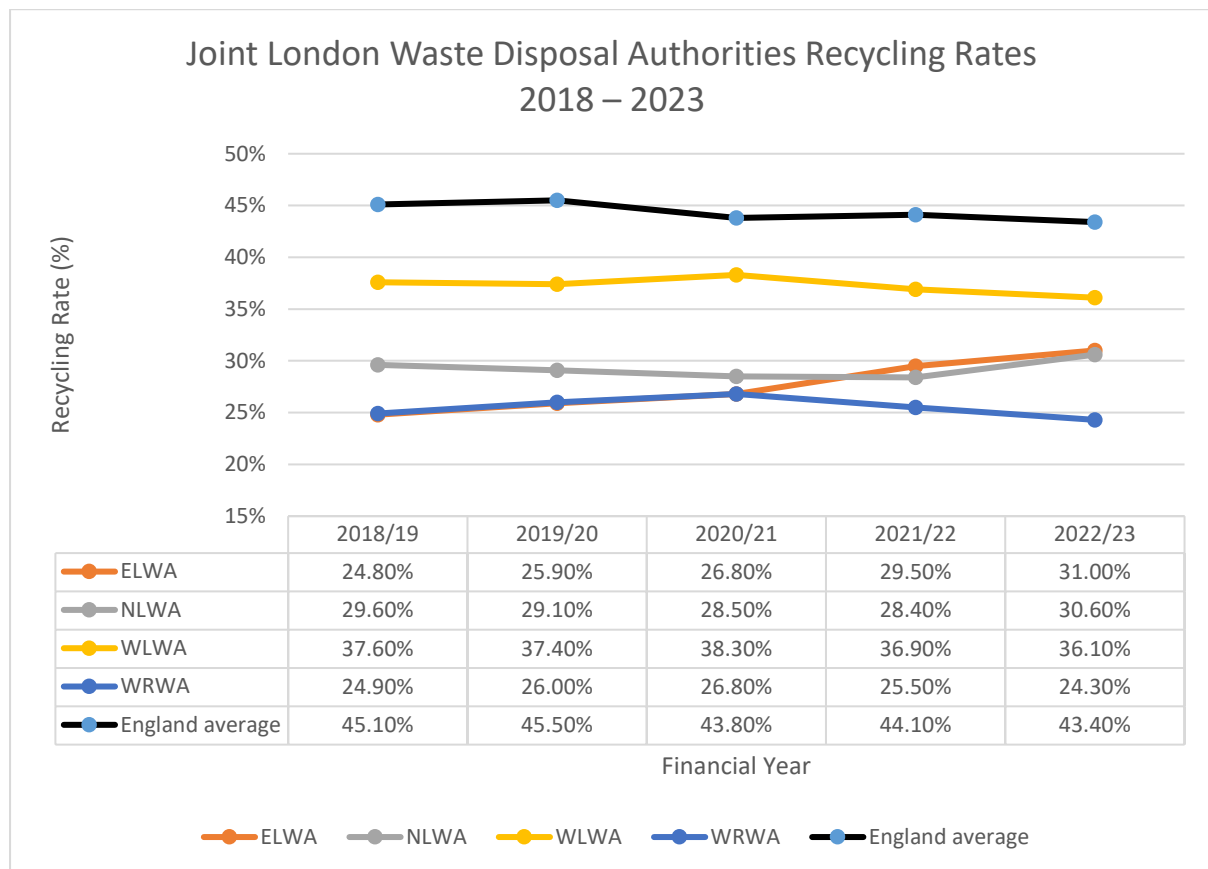


Figure 7 shows the recycling rate for the Western Riverside Partners over the last five years, compared with the same data for the other London joint waste disposal authorities.

Figure 7. WRWA and other joint London waste disposal authority recycling rates 2018 – 2023¹⁶.



Recycling capture rates

Based on waste collections in 2022/23, the capture rates for each recyclable material are presented below (Table 3). The capture rate represents how much of the recyclable material has been captured in the recycling bin and how much remains in the residual bin.

The Western Riverside Partners have high recycling capture rates for recyclable card and cardboard of 78%. Recyclable glass also has a high capture rate of 66%. These materials are closely followed by recyclable steel, aluminium and paper which have capture rates of between 57% and 60%.

As previously mentioned, only one Partner Authority out of the four has a food collection service for all street-level properties (although others are conducting trials), this reflects the opportunity to increase the food waste capture rate from 7%. Similarly, for garden waste, only two of the four Partner Authorities offer a garden waste collection service, which is reflected in the capture rate of 15%. For textiles as well, although each of the Partner Authorities have bring banks for clothes (and shoes) these aren't captured at the kerbside. Residents are advised to check their Local Authority's website for the latest updates on what can be recycled.

¹⁶ <https://www.letsrecycle.com/councils/league-tables/>

Table 3: Material Capture Rates

Material	Capture rate (%)	Remaining in residual (%)
Recyclable paper	57%	43%
Recyclable card & cardboard	78%	22%
Liquid cartons	36%	64%
Plastic bottles	47%	53%
PTTs	35%	65%
Recyclable glass	66%	34%
Steel	60%	40%
Aluminium	60%	40%
Textiles	7%	93%
WEEE	17%	83%
Garden waste	15%	85%
Food waste	7%	93%

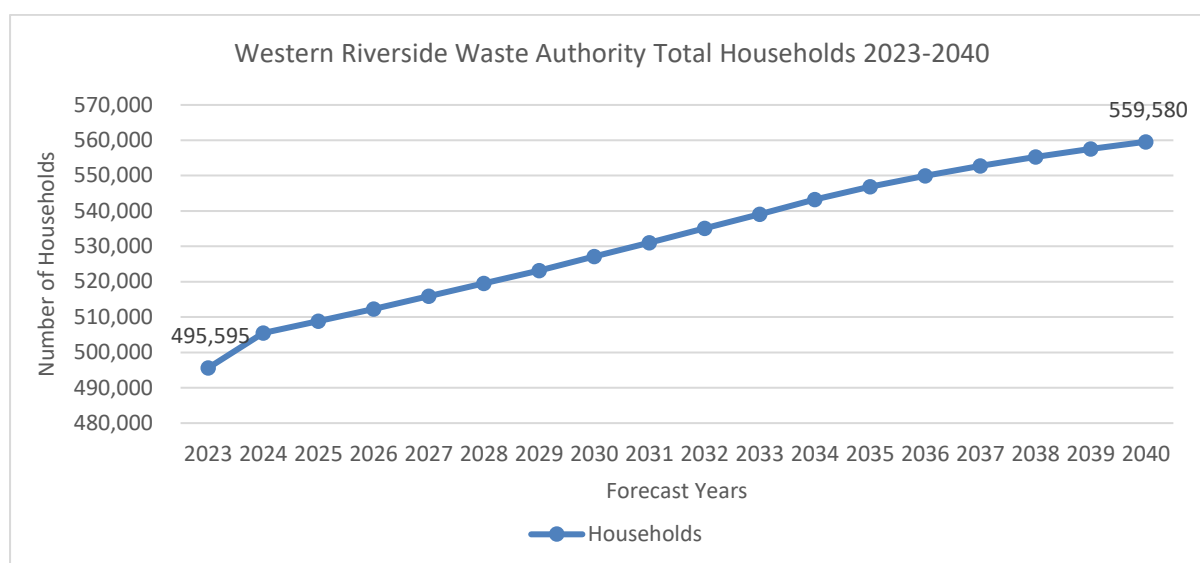
PREPARING FOR THE FUTURE

In order to prepare for the future, there is a need for this Strategy to consider how key factors may change over time, including population growth and the amount of waste which is produced within the Western Riverside area. This section looks at future projections to help understand the challenges that will be faced, and to inform the development of the Strategy so that it takes into consideration these key factors.

Household growth

The graph below shows the projected total number of households for the Partner Authorities for 2023 to 2040.

Figure 8. Projected total number of households for WRWA 2023-2040

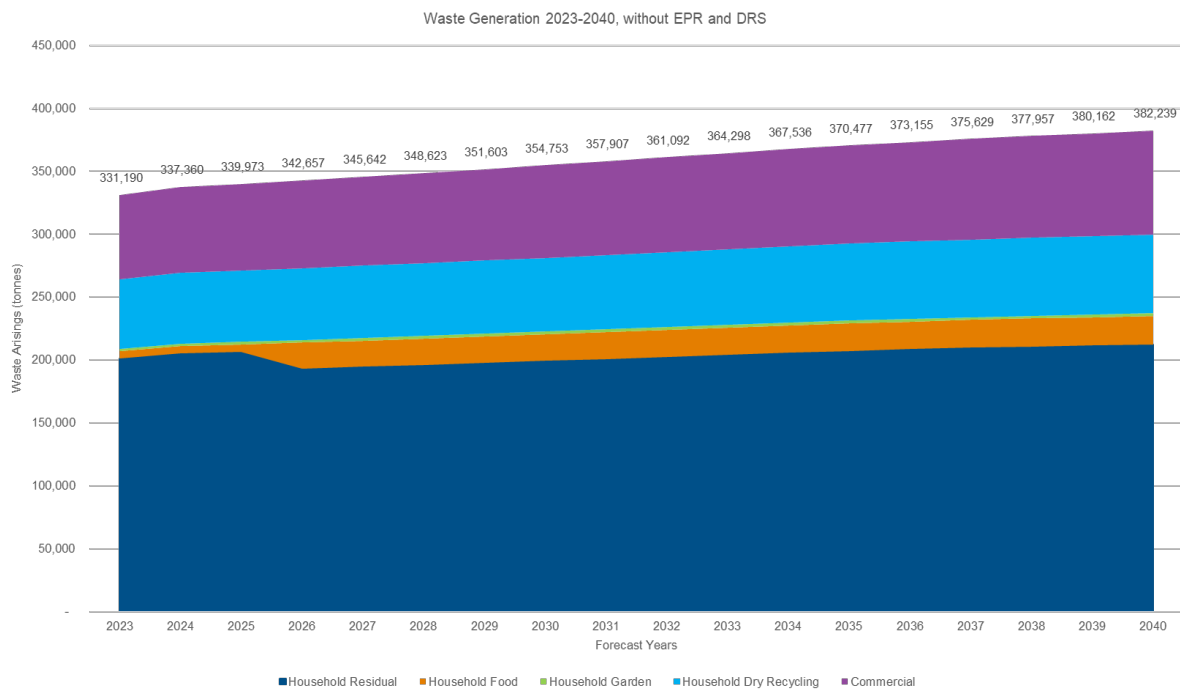


The total number of households is expected to increase by 13% from 495,595 households in 2023 to 559,580 households in 2040.

Waste arisings

It is reasonable to expect that the population within the Western Riverside area will increase along with this projected increase in the number of households, which means there will be more people producing waste. Figure 9 shows the projected waste arisings, assuming that the amount of waste generated per household remains the same – i.e. that there is no change in waste generation as a result of policy changes such as Simpler Recycling, EPR and DRS. The graph below also takes into account the rollout of food waste borough-wide in 2026 in accordance with policy requirements.

Figure 9. Waste generation 2023-2040, without EPR and DRS



Key forecast headlines

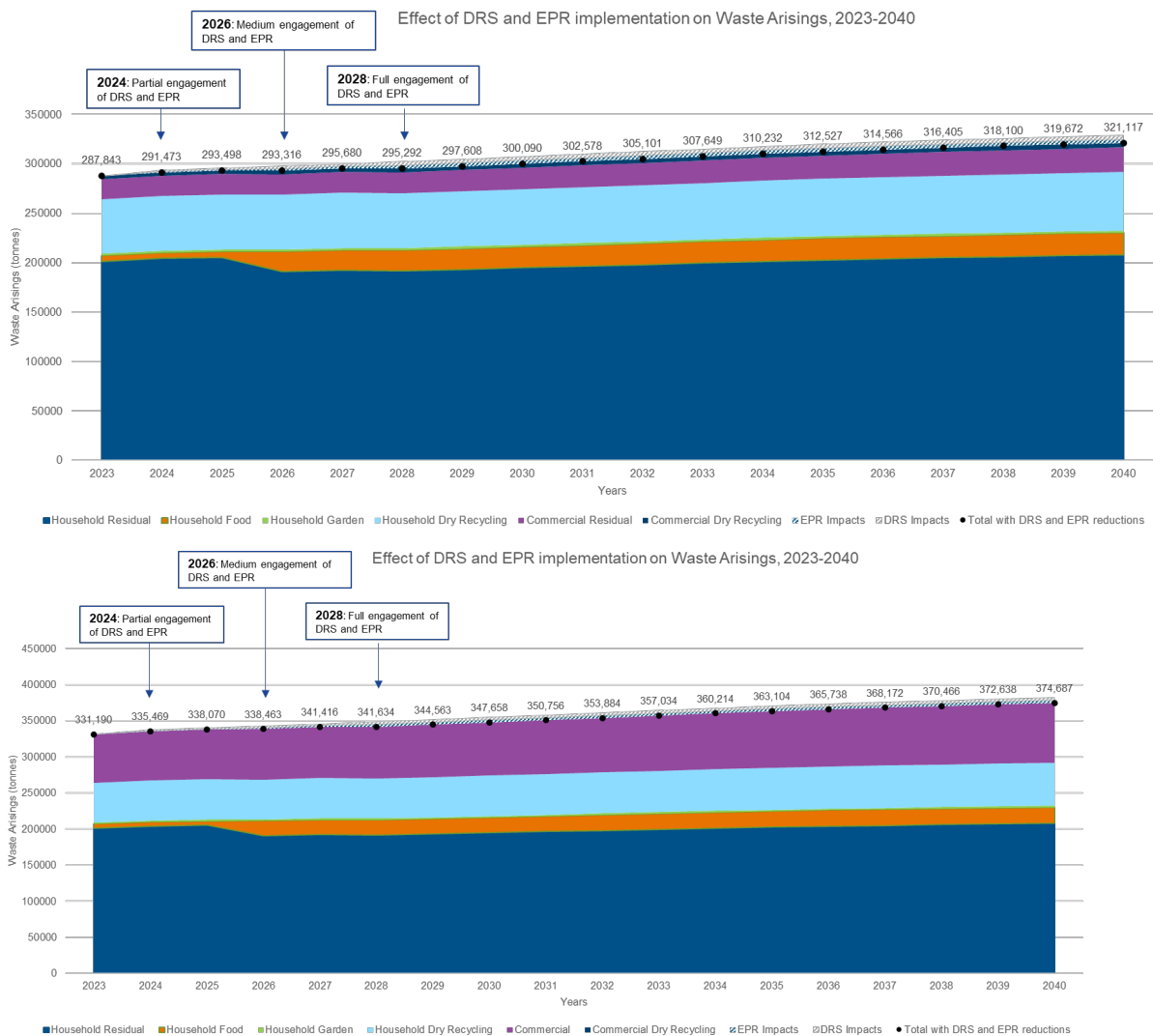
The above graph shows that, without changes to policy, it is likely that there will be an increase in waste arisings as a result of population growth.

The increase in the number of households and associated increase in waste arisings as well as the roll out of new collections such as food waste, will result in increased requirements for waste collections and processing. As a result, more vehicles and staff will be required to collect waste within the Western Riverside area, which will result in additional costs for waste collections and may place pressure on depots for vehicle parking.

There will also be a requirement for additional capacity for handling and processing this waste, which would place additional demands on existing infrastructure including the Smugglers Way and Cringle Dock waste transfer stations, the HWRC, and other processing infrastructure such as residual waste processing at the EfW and dry recycling processing at the MRF.

Figure 10 provides a forecast of municipal waste arisings taking into account projected impacts of policy changes.

Figure 10. Projected impact of EPR and DRS on Waste Generation 2023-2040



The graph shows that the combined effects of DRS and EPR could lead to an estimated 2.2% reduction in household residual waste and 4.7% reduction in household dry recycling waste in 2040. Some waste streams including household food and garden waste will not be affected by the EPR and DRS policies.

Overall, there could be an average reduction of 2.5% in total household waste generated in 2040 if EPR and DRS are implemented.

Costs associated with waste management

A significant proportion of the costs for managing waste are associated with residual waste treatment. For 2022/23 the combined collection and treatment costs for the Western Riverside Partners totalled £61 million, and approximately 52% of this was for residual waste treatment. The balance of costs consisted of waste collections and the processing of recyclables.

The cost (£/tonne) of residual waste processing is likely to increase significantly in coming years. From 2028, the UK Emissions Trading Scheme (UK ETS) will apply to waste incineration, meaning that there will be a 'cost of carbon' which will need to be taken into account for residual waste processing. The intention of the UK ETS applying to waste incineration is to financially incentivise the reduction of residual waste arising (particularly plastic waste) and to promote decarbonisation of the energy from waste sector through initiatives such as Carbon Capture and Storage. As such, it will be important for the Western Riverside Partners to reduce residual waste arisings in order to mitigate the potential cost increases. Early estimates by the Environmental Services Association put the price of carbon to be between £40 - £150/tonne, which would mean significant additional costs for the Western Riverside Partners. In the context of increasing households / population, this will mean reducing the amount of residual waste generated in each household which can be achieved either by reducing overall waste arisings through waste prevention and reuse initiatives and by increasing the proportion of material which is recycled. Implementing circular economy principles, introducing new recycling services, expanding existing recycling services, and undertaking communications with residents and business are ways in which this could be achieved.

Funding for waste management services

The packaging EPR initiative has a core theme to implement the 'polluter pays' principle, which will mean passing the cost of dealing with packaging waste on to the producers of the packaging material. At present, local authorities pick up the cost of dealing with this packaging waste through waste management services. Whilst the details of the mechanics for the EPR cost system are currently being worked up by Government, it is understood that the intention will be to provide EPR payments to local authorities to help pay for the costs of managing the packaging waste. This should mean that the Western Riverside Partners will be financially compensated for managing these wastes, although the value of these payments is not yet clear.

Based on this knowledge, the Western Riverside Partners will aim to reduce the cost of residual waste treatment by encouraging residents and businesses to reduce waste, repair and reuse items and recycle more, which will have the benefit of reducing both collection and disposal costs.

VISION, THEMES AND ACTION

Vision setting is a key step in the development of the Strategy. The vision sets the level of ambition and the collective priorities of the Western Riverside Partners to drive change while ensuring that these changes can be realistically achieved.

Officers and Elected Members from the Western Riverside Partners collectively developed a vision and selected 9 strategic themes reflecting the high ambitions of the WRWA Partners. In general Officers and Elected Members believe that current performance is good in terms of waste reduction and performing in line with that of similar authorities and partnerships within London for recycling, but that additional efforts need to be made so that it can become a leading example of good waste management practices of all similar authorities in the UK.

The Western Riverside Partners recognise that more can be done to minimise waste arisings, maximise reuse opportunities and divert more recyclables from residual waste into recycling. Unavoidable waste will be converted into heat and power through EfW treatment in preference to other disposal options.

A collective draft vision statement for the Strategy has been agreed:

“The Western Riverside partners will work together with our residents and businesses to prioritise waste prevention, reduce our carbon emissions and environmental impacts, and provide customer focused waste and recycling services that maximise value from the materials we manage.”

ACTIONS TO MEET PRIORITIES

To achieve the Vision of this Strategy, the Western Riverside Partners, residents and businesses will need to work together to drive change.

Through engagement with Officers and Elected Members, a set of strategic themes and actions, aligned to aspirations have been identified to help achieve the Vision, focusing on key areas including waste prevention, enhanced customer service and a reduction in environmental impact.

The actions have been grouped under four areas, which will have dedicated action plans within which the individual actions can sit, and progress can be monitored. The action plans will be developed following adoption of the Strategy. Actions under ‘Delivering Best Value and preparing for the future’ will be monitored as part of the WRWA annual review process.

- Transitioning to a circular economy
- Achieving Net Zero
- Collaborating and Communicating to amplify our impact
- Delivering Best Value and preparing for the future

Actions will also cross-reference to existing actions outlined in the boroughs Waste Reduction and Recycling Plans (RRPs).

Each of the actions link to one (or more) of the nine strategic themes:

1. Customer Service
2. Low Carbon
3. Financial Considerations
4. Waste Prevention
5. Flexibility
6. Deliverability
7. Increased Recycling
8. Meeting Government Changes
9. Collaboration

TRANSITIONING TO A MORE CIRCULAR ECONOMY

Waste prevention, reuse, repair and recycling all form part of the circular economy, with reducing the amount of waste produced providing the greatest environmental and cost benefits. Through making considered choices when purchasing items, waste can be reduced. This includes buying items with longer lifespans, choosing items which can be easily repaired, avoiding food leftovers and using refillable containers.

Donating items for reuse and buying reused items also provides environmental and cost savings with the additional benefits of social value including job creation and skills development.

For those items that can't easily be prevented or reused then recycling is the next best option and there are opportunities to increase recycling levels across the Western Riverside Partners. Studies on the composition of the residual waste generated in the area show that nearly a quarter of sack/bin collections contain waste that could be recycled or composted through services that are currently provided to residents. Further participation from our residents to capture these valuable materials and ensure that the right items are being placed in the right container, reducing contamination.

Actions to support the transition to a more circular economy	Linked themes
Develop a circular economy action plan, which will allow the Western Riverside Partners to investigate and plan for all identified waste prevention, reuse, repair and recycling actions.	4
Develop a social value policy and investigate options for measuring social value across the range of activities the Western Riverside Partners deliver	
Continue to promote existing waste prevention activities and promote / signpost new activities across a range of areas including (but not limited to) real nappy schemes, sanitary wear, textiles repair, repair cafes, give and take days, swishing events for clothes, toy libraries, home and community composting.	4
Support the Mayor's target to reduce food waste by 50% by 2030, through promotion of food waste reduction initiatives and support of local and national food waste reduction campaigns.	4
Maximise and promote opportunities to reuse items in good cosmetic condition, encouraging residents to book a reuse collection	4

Actions to support the transition to a more circular economy	Linked themes
service for items that are in good condition, rather than Bulky Waste collection service for disposal of items they no longer need or want.	
Seek opportunities to adjust Bulky Waste collection services to enable more reuse of bulky household items.	4
Investigate opportunities to set up and operate one or more 'reuse hubs / shops' located in the Western Riverside area to provide more sites for repair and reuse where residents can 'bring and buy' a range of household goods delivering cost savings and social value.	4
Engage with Partner Authority planning teams to identify opportunities where circular economy can be embedded into planning policy	
Expand food waste collection services to non-domestic premises by 2025 by 31 st March 2025 and all households by 31 st March 2026 in line with the Environment Act 2021. Explore the provision of food waste collections for businesses.	7, 8
<p>Explore opportunities to expand household collections to include:</p> <ul style="list-style-type: none"> • Aluminium foil, food trays and aerosols • A wider range of packaging and containers • Textiles, small WEEE and batteries • Recyclable plastic film (required by March 2027) <p>Where economic to do so and where relevant markets exist for recycling.</p>	7, 8
Identify opportunities to extract more recyclable material from bulky waste, street cleansing waste and fly tipped materials and investigate options for recycling other materials such as mattresses.	7
Identify opportunities to increase recycling rates in flats, utilising ReLondon's Toolkit - Flats Recycling Package, or other suitable approaches.	7
<p>Meet a minimum performance of 35% LACW by 2030, with stretch targets of 38% by 2030 and 50% by 2040.</p> <p>Meet a minimum performance of 30% HHW recycling by 2030, with stretch targets of 33% by 2030 and 45% by 2040</p>	7
Work towards the Government target for reducing municipal residual waste to 333 kg/capita per year by 2042, as outlined in the Environmental Improvement Plan 2023.	7, 8
Identify options for a garden waste collection service for those areas that have gardens but don't currently have access to a service.	7, 9

ACHIEVING NET ZERO

The reduction of carbon emissions is crucial to mitigating the risks and impacts of global warming. Reuse and recycling of items removes the need to produce further products from precious raw materials, while preserving the energy embedded in them during production. Reducing the environmental impact of collecting and treating WRWA’s waste is important in reaching net zero goals. By adopting circular economy principles, maximising resources and ensuring no waste is sent to landfill, the environmental impacts of the waste service can be reduced.

Actions to achieve Net Zero	Linked themes
Identify key areas of focus to reduce emissions through the development of a Net Zero action plan.	2
Quantify the GHG emissions across the whole service in a clear, transparent and accountable way.	2
Contribute towards the Mayor’s net zero plan for London for 2030 by reducing waste emissions, adopting the principles of the waste hierarchy.	2, 4, 7
Continue to send all truly non-recyclable waste to EfW, with no waste sent to landfill and incorporate the assessment of carbon emissions performance into the procurement criteria for any new waste disposal contract, ensuring best available technology is available for reduction in air pollution emissions. This supports the Mayor’s ambition for a zero-waste London, sending no biodegradable or recyclable waste to landfill by 2026.	2, 8
Continue to reprocess the by-products of the EfW process, for example by extracting metals from incinerator bottom ash and using the ash for construction aggregate.	2, 7
Reduce the environmental impact of our waste collection and treatment activities by adopting strategies to minimise emissions from waste service operations, transport, transfer and treatment, including supporting the development of carbon capture and storage for managing emissions from EfW and ULEZ and LEZ compliant fleet.	2, 3
Explore options to transition to low carbon fuels and electricity sources where infrastructure allows.	2, 6

COLLABORATING AND COMMUNICATING TO AMPLIFY IMPACT

The key to success is through knowledge sharing, participation and engagement, which can only be achieved through collaborative efforts.

It is important that partnership arrangements with community organisations, housing associations, local authorities, and other key stakeholders are developed to enhance work on waste prevention, reuse and recycling. It's also important that the waste and recycling services the Western Riverside Partners deliver are customer-focused, cost-effective, effectively communicated and reliable so that residents and businesses have the confidence that their individual actions are impactful within the local and wider environment.

Action to amplify impact through collaboration and communication	Linked themes
Develop a collaboration and joint communications plan to amplify the impact of the Western Riverside Partners activity.	1, 9
Review how the Western Riverside Partners work together and ensure structures are fit for purpose to deliver the strategy and work effectively	
Provide easy-to-use and clearly defined services, that respond to local resident needs, and encourage residential participation. Consider co-production approach, working with residents and other service users in the development of new service offerings.	1
Monitor customer satisfaction with our services including: <ul style="list-style-type: none"> customer surveys at our HWRC feedback from our customer call centres Ensure customer service and feedback is an integral part of new service design to support service optimisation	1
Undertake education activities including school visits to the education centre and behaviour change to support residents to: <ul style="list-style-type: none"> reduce their waste increase the capture of materials that can otherwise be recycled or composted from the residual waste stream. Studies on the content of the residual waste bins/sacks shows that paper and card, garden waste and textiles are areas of particular focus. 	7, 4
Ensure effective signposting to charities that reuse household goods, such as the British Heart Foundation, Emmaus, ReWork for furniture and electrical and electronic equipment and TRAIID textiles.	4
Work collaboratively with other authorities to maximise our efforts in moving the world to a more circular economy	9, 4
Investigate ways to work closely with ReLondon, e.g. through communications campaigns which play an active engagement role to promote resident behaviour change and increase participation in reuse, recycling and the circular economy.	9

Action to amplify impact through collaboration and communication	Linked themes
Support national and regional campaigns on waste prevention, and develop local campaigns to support projects and services.	9, 7, 4
Maximise social value benefits through waste and resource management, by encouraging upskilling and the creation of new job opportunities within the sector. This includes the provision of opportunities for long-term unemployed through the reuse and repair projects and outreach work.	9, 4
Engage residents, community groups, and local business in the development and implementation of the strategy and action plans, primarily through the public consultation process and then through the ongoing reviews.	1

DELIVERING BEST VALUE AND PREPARING FOR THE FUTURE

It is of utmost importance that the Western Riverside Partners deliver value for money for customers through services delivered. The Western Riverside Partners are required to ensure that business is conducted so that public money is safeguarded and properly accounted for and used economically, efficiently and effectively to achieve best value.

Budgets are monitored and regular reports are presented to Members four times per year. An annual review demonstrating performance is also published.

In order to deliver best value, future changes that may affect services and infrastructure must be understood and where possible planned for so that flexibility and resilience can be built-in to operations. Changing consumer habits and behaviours, forthcoming regulations, even climate change will influence the types of materials collected, the way in which they're collected, treated and processed as well as the future service costs. The Western Riverside Partners want to ensure that they are compliant with any forthcoming regulations but are also strategically poised to capitalise on the benefits and mitigate challenges brought by policy shifts.

Actions to Deliver Best Value and Prepare for the Future	Linked themes
<p>Undertake annual progress monitoring through the lifespan of the Strategy to measure progress against strategy priorities and ensure WRWA remains on track with achieving its goals.</p> <p>A full review will be undertaken every 5 years to ensure the Strategy remains flexible and appropriate to current circumstances.</p>	1
<p>Review progress against the action plans every four months to ensure the Western Riverside Partners are delivering on the actions which support the strategy.</p>	
<p>Continue to provide financial incentives for the Western Riverside Partners to reduce overall costs of treatment and disposal by moving waste up the waste hierarchy and maximising diversion of recycling and food waste from residual waste</p>	3
<p>Maximise the value from the existing waste treatment contract through increased capture of re-useable and recyclable material.</p>	3
<p>Ensure future contractual arrangements are comprehensive, competitive and affordable across their lifespan.</p>	3
<p>Demonstrate to residents and businesses the economic value in preventing/minimising waste, repairing items and buying reused through signposting to local resources including the reuse workshop located at Smugglers Way</p>	3, 2, 4
<p>Seek to maximise the value of existing assets through intensification of use and redevelopment, where viable.</p>	3
<p>Review existing assets to understand potential requirements for futureproofing e.g. through changes to waste composition driven by consumer habits and regulatory changes (EPR and ETS)</p>	3

Actions to Deliver Best Value and Prepare for the Future	Linked themes
Pursue a progressive and innovative approach to waste management where waste prevention is prioritised and recycling maximised.	5
Ensure services and infrastructure / assets meet all future needs including regulatory changes and increases in housing and population	6
Seek opportunities to work more closely with neighbouring Waste Disposal Authorities (beyond regular scheduled meetings) to enhance resilience and provide flexibility	5, 9
Explore opportunities to expand the existing reuse workshop located at Smugglers Way (ReWork) space to increase the items that can be reused and the amount of goods that can be repaired	5
Undertake a review of HWRC provision at Smugglers Way, including site layout and signage and a review of information provided on the Authority's website to ensure it maximises recycling on site.	7, 1, 4

MONITORING PROGRESS

This Strategy sets out the framework for a long-term approach to managing resources and waste across the Western Riverside area from 2025 to 2040 and once adopted will supersede the WRWA Joint Waste Management Policy.

In order to assess whether the aims and priorities of this Strategy are being met and to ensure it remains appropriate to evolving national and regional policy (including the London Environment Strategy), it is important to establish clear measures which can be monitored and reported on.

Working together, the Western Riverside Partners will carry out annual reviews (subject to resources and individual council activities) to monitor performance and ensure the approach continues to be relevant, appropriate and effective. This includes monitoring specific contributions to the Mayor of London's targets in any future update of the LES. Results of the annual review will be published on the Western Riverside Partners websites.

Once the Strategy has been adopted, actions within the following areas will be further developed:

1. Transitioning to a circular economy
2. Achieving Net Zero
3. Collaborating and Communicating to amplify our impact
4. Delivering Best Value and preparing for the future

Three action plans will be created covering areas 1-3 and actions relating to 'Delivering Best Value and preparing for the future' will be incorporated into the WRWA annual monitoring and review process.

Actions within the plans will incorporate those listed within the Strategy, they will also cross-reference to existing actions outlined in the Partner Authorities Waste Reduction and Recycling Plans (RRPs).

Each action will have a defined owner and timeframe for delivery.

Review cycle

- Strategy adopted
 - Action plans developed
 - Formal review cycle for the strategy set
- Every 4 months
 - Progress against actions reviewed
- Annually
 - Actions reviewed to ensure that they remain fit for purpose
 - Plans updated to incorporate new actions to support delivery of the Strategy
 - Annual review of progress against the strategy published on the WRWA website
- Every five years OR more frequently where a substantial change occurs
 - Strategy review

PERFORMANCE INDICATORS

This section identifies the performance indicators that will be used to monitor progress against the aims and objectives of the Strategy.

The Western Riverside Partners continually monitor their performance, through daily collation of waste tonnage data to establish trends for each type of recycling or waste received. This information is reported on a quarterly basis to the Government (via Waste Data Flow), while the performance of each Council is reported as part of the RRP requirements set out by the Mayor of London.

The following weight-based key measures are currently reported to the GLA and the UK Government:

Metric	Meaning	Link to Action (s)
<p>Total residual (non-recycled) waste per household (kgs/household)</p> <p>Total annual household waste per person (kgs/capita):</p>	<p>This is the amount of residual household waste that residents dispose of, either through their kerbside collections, at the HWRC or through street litter bins. A positive performance is indicated by a reduction in these figures.</p>	<p>These measures will allow monitoring against the Environmental Improvement Plan's target for reducing municipal residual waste to 333 kg/capita per year.</p>
<p>Total annual household avoidable (edible) food waste per person (kgs/capita):</p>	<p>This is based on estimated avoidable food waste produced which was once edible (e.g. slices of bread, apples, meat). Each Borough is expected to estimate this figure based on either their own composition data or through WRAP¹⁷'s food waste guidance. A positive performance is indicated by a reduction in these figures</p>	<p>These measures will allow monitoring against the Mayor's target to reduce food waste by 50% by 2030.</p>
<p>Annual household waste recycling rate and annual LACW recycling rate (% by weight):</p>	<p>In addition to continuing to use the existing measure of household waste reused, recycled or composted, an expanded metric which covers all LACW (i.e. including household and commercial waste collected by the authority). Use of these metrics is in line with the LES, which has set reuse, recycling and composting targets for both LACW and household waste.</p>	<p>This Strategy has set a minimum performance of 35% LACW by 2030, with stretch targets of 38% by 2030 and 50% by 2040, and a minimum performance of 30% HHW recycling by 2030, with stretch targets of 33% by 2030 and 45% by 2040</p>

¹⁷ WRAP is a climate action NGO working with businesses, individuals and communities to achieve a circular economy, by helping them reduce waste, develop sustainable products and use resources in an efficient way.

Metric	Meaning	Link to Action (s)
Proportion (%) of properties receiving the Mayor's minimum level of service for household recycling:	This is disaggregated by property type (i.e. kerbside, flats, flats above shops) and concerns the six main dry recycling materials (glass, cans, paper, card, plastic bottles and mixed rigid plastics (pots, tubs and trays)) and separate food waste collections.	These measures will allow monitoring against the Environment Act 2021, in which a core set of dry recyclables, and food waste must be collected from all households by 31st March 2026.
Proportion (%) of waste fleet heavy vehicles that are ULEZ compliant	To align with the Mayor's ambition that all new vehicles under 3.5 tonnes are zero emissions capable by 2025, all heavy vehicles are fossil-free from 2030, and for zero emission fleets by 2050.	These measures will help to reduce the environmental impact of waste collection and treatment activities through the adoption of strategies to minimise emissions from waste service operations, transport, transfer and treatment
Performance of LACW activities against the Mayor's EPS (tonnes of CO2eq per tonne of waste managed):	GLA has provided an online calculator whereby boroughs can upload waste tonnage data to determine the emissions performance of their waste management service.	This measure and the preceding one demonstrate the contribution of waste collection and treatment activities towards the Mayor's net zero plan for London for 2030.

CAN WE GO FURTHER FASTER?

The short answer is we aspire to!

We know that Mayor of London has a target to recycle 50% of London's household waste and the Western Riverside Partners are ready to make their contribution towards achieving that. We are already doing well in certain areas such as by reducing levels of total residual waste per household / head, with the Partners generating amongst the lowest level of residual waste in the Country. We also use low emission tugs and barges to transport our residual waste by river, removing large vehicles from London's congested roads, so we're working hard to reduce our carbon emissions. There's always more we can do though.

Extensive research and analysis has helped us identify how the Western Riverside Partners can increase our environmental performance in the future and make a meaningful contribution to UK and Mayoral targets.

Two of our priority areas are recycling and reuse.

In terms of recycling rates we've developed targets that will stretch us, but are not unrealistic. We've looked at different approaches, benchmarked performance with similar local authorities and have forecast what we could achieve if we were able to increase recycling levels.

Over the period to 2030, we'll be focussing on increasing access to food waste services, expanding the range of materials that can be recycled and supporting residents to recycle more and recycle the right things (reducing contamination). We'll be counting on our residents and business to play their part.

Reuse is a fantastic way of making our stuff last for longer (as well as providing significant social value) and we'll be building on and expanding our successful reuse activities across the Partnership area. We'll be looking at how we can divert more good quality items for reuse and repair and away from disposal.

We'll be reviewing and adding to our action plans regularly and will monitor best practice so we can identify additional ways of improving our performance and supporting our residents and businesses.

There's lots to do and we'll be keeping you up to date with progress.

GLOSSARY

Term	Acronym	Description
Anaerobic digestion	AD	The process by which organic matter is broken down, in the absence of oxygen. The biogas created by the process can be used as a fuel to generate renewable energy i.e. electricity and heat, and as a bio-fertiliser for farmland.
Circular economy	CE	A system where resources are maximised and kept in the system as long as possible through processes such as reuse, repair, recovery and recycling.
Commercial waste	CW	Commercial (or business) waste is any waste that comes from a commercial activity including waste that comes from retail, construction, demolition, industry, agriculture,
Constituent Councils	CCs	The Councils that make up Western Riverside Waste Authority, namely London Borough of Hammersmith & Fulham, Royal Borough of Kensington and Chelsea, London Borough of Lambeth and London Borough of Wandsworth.
Deposit return scheme	DRS	A recycling scheme in which consumers pay a small deposit upon purchase of drinks containers, which is refunded upon receipt of the empty container at designated return points.
Energy from Waste	EfW	Energy from waste facilities generate renewable energy in the form of electricity or heat through incineration of residual waste.
Extended producer responsibility	EPR	A policy in which producers are responsible for the products they create throughout its lifecycle. The scheme aims to create a more circular economy and increase recycling by making individual businesses responsible for the full net cost of managing packaging waste, with higher modulated fees applied to items which are harder to recycle.
UK Emissions Trading Scheme	ETS	Waste Management is a regulated sector under the UK ETS. A cap is set on the total amount of GHGs that can be emitted by the waste sector. The ETS covers the burning of fossil material by all EfW (e.g. plastic).
Greenhouse Gas	GHG	Greenhouse gases (such as carbon dioxide and methane) absorb solar radiation and trap heat in the atmosphere, creating a 'greenhouse effect' which results in global warming. It is common for

Term	Acronym	Description
		the measurement of different greenhouse gas emissions to be standardised into 'carbon equivalent' emissions, allowing for easier comparisons of the many types of activity that produce these emissions.
Household Waste	HHW	All waste collected by Waste Collection Authorities under section 45(1) of the Environmental Protection Act 1990, plus all waste arising from Civic Amenity sites (HWRCs) and waste collected by third parties for which collection or disposal credits are paid under Section 52 of the Environmental Protection Act 1990. Household waste includes waste from collection rounds of domestic properties (including separate rounds for the collection of recyclables), schools, public buildings, street cleansing and litter collection, beach cleansing, bulky household waste collections, hazardous household waste collections, household clinical waste collections, garden waste collections, Civic Amenity/Household Waste and Recycling Centre wastes, drop-off/'bring' systems, clearance of fly-tipped wastes, weekend skip services and any other household waste collected by the waste authorities. Household waste accounts for approximately four fifths of London's municipal waste.
Household Waste and Recycling Centre	HWRC	A facility where the public can dispose of household waste and recycling, including garden waste, electrical, textiles and bulky waste. While some sites accept commercial waste, the Smugglers Way HWRC is for resident use only.
Local Authority Collected Waste	LACW	All waste collected by the local authority, including household waste and household-like waste from businesses and non-municipal fractions such as construction and demolition waste.
Materials Recycling Facility	MRF	A MRF is a processing plant for recyclables. It uses a combination of mechanical and technical equipment to separate co-mingled recyclables into single stream materials.
Municipal waste	MSW	Household waste and waste similar in nature produced by businesses and composition to household waste which is managed by a waste collection or waste disposal authority.

Term	Acronym	Description
		Sometimes also referred to as Municipal Solid Waste.
Natural capital accounting	NCA	A tool to define the value of natural assets, such as soil productivity, access to clean water and recreational green space, and what it could provide for future generations.
Waste Collection Authority	WCA	A local authority responsible for collecting waste from households and certain commercial premises where required (e.g. the Constituent Councils).
Waste Disposal Authority	WDA	A local authority responsible for the treatment and disposal of waste collected by Waste Collection Authorities (e.g. WRWA).

APPENDIX ONE – DEMOGRAPHIC INFORMATION

According to the 2021 census¹⁸, between 50% and 58.4% of households are not deprived in any dimension, with 27.9% to 31.7% deprived in one dimension, as set out in Table 4. The dimensions of deprivation used to classify households are indicators based on four selected household characteristics: education; employment; health; and housing. Further details of each of these dimensions are provided on the ONS Census Dictionary¹⁹.

Table 4. Levels of deprivation in the Councils and London. Source: 2021 Census

Category	Hammersmith & Fulham	Lambeth	Wandsworth	Kensington and Chelsea	London
Not deprived in any dimension	51.4%	50.0%	58.4%	52.6%	48.1%
Deprived in one dimension	31.1%	31.7%	27.9%	30.3%	32.9%
Deprived in two dimensions	13.0%	13.8%	10.5%	12.1%	14.4%
Deprived in three dimensions	4.1%	4.1%	3.0%	4.4%	4.3%
Deprived in all four dimensions	0.5%	0.4%	0.3%	0.6%	0.4%

Table 5 sets out the occupancy rating (according to bedrooms) and the composition of households (according to the relationships between members) in the Partner Authorities and London.

Whether a household's accommodation is overcrowded, ideally occupied or under-occupied is calculated by comparing the number of bedrooms the household requires to the number of available bedrooms. A negative occupancy rating implies a household has fewer bedrooms than required (overcrowded) while a positive occupancy rating implies a household has more bedrooms than required (underoccupied).

¹⁸ <https://www.datawand.info/census-2021/>

¹⁹

<https://www.ons.gov.uk/census/census2021dictionary/variablesbytopic/demographyvariablescensus2021/householddeprivation>

Table 5. Occupancy rating for bedrooms and household composition in the Partner Authorities and London. Source: 2021 Census

Category	Hammersmith & Fulham	Lambeth	Wandsworth	Kensington and Chelsea	London
Overcrowded households	9.1%	10.6%	7.6%	8.1%	11.1%
Ideally occupied households	48.2%	47.4%	42.8%	46.8%	40.0%
Underoccupied households	42.7%	42.0%	49.7%	45.1%	48.9%
One person household	36.1%	32.0%	29.9%	43.7%	29.3%
Single family household	47.6%	47.6%	54.1%	44.1%	58.0%
Other household types	16.4%	20.4%	16.0%	12.2%	16.0%

Table 6 displays the levels of economic activity within the Partner Authorities and London. Economically active means people aged 16 years and over who, between 15 March and 21 March 2021, were:

- in employment (an employee or self-employed)
- unemployed, but looking for work and could start within two weeks
- unemployed, but waiting to start a job that had been offered and accepted

Economic inactivity includes those who were: retired; students; looking after home or family; long-term sick or disabled; and others aged 16 or over who did not have a job between 15 and 21 March 2021 and had not looked for work between 22 February to 21 March or could not start work within 2 weeks.

Note that due to the year of the census, there are pandemic-related quality considerations for this variable.

Table 6. Economic activity in the Partner Authorities and London (% of people aged 16 or over). Source: 2021 Census

Category	Hammersmith & Fulham	Lambeth	Wandsworth	Kensington and Chelsea	London
Economically active: in employment (including full-time students)	63.4%	68.0%	69.6%	56.4%	61.4%
Economically active: Unemployed (including full-time students)	5.0%	5.3%	4.0%	4.6%	4.8%
Economically inactive	31.6%	26.7%	26.4%	39.0%	33.8%

Table 7 provides the stated ethnic group of residents within the Partner Authorities and London identified as part of the 2021 Census.

Table 7. Ethnicity in the Partner Authorities and London. Source: 2021 Census

Category	Hammersmith & Fulham	Lambeth	Wandsworth	Kensington and Chelsea	London
Asian, Asian British or Asian Welsh	10.5%	7.3%	11.7%	11.9%	20.7%
Black, Black British, Black Welsh, Caribbean or African	12.3%	24.0%	10.1%	7.9%	13.5%
Mixed or Multiple ethnic groups	6.7%	8.1%	6.3%	6.6%	5.7%
White	63.2%	55.0%	67.8%	63.7%	53.8%
Other ethnic group	7.3%	5.7%	4.1%	9.9%	6.3%

Table 8 shows the tenure of households in each Partner Authority as well as for London overall according to the 2021 census data. All Partner Authorities except Wandsworth have a higher proportion of social rented housing than London as a whole. Despite having the highest proportion of social housing, Kensington and Chelsea also has the highest

proportion of properties that are owned outright (19.9%), although this is still slightly lower than the figure for London (20.7%).

Table 8 Household tenure in Partner Authorities and London. Source: 2021 Census

Category	Hammersmith & Fulham	Lambeth	Wandsworth	Kensington and Chelsea	London
Social rented	29.8%	33.6%	19.3%	27.6%	23.1%
Private rented or lives rent free	36.6%	31.6%	36.4%	39.8%	30.1%
Owns with a mortgage or loan or shared ownership	18.2%	22.8%	26.5%	12.8%	26.0%
Owns outright	15.4%	12.0%	17.8%	19.9%	20.7%

Equality Impact Assessment

Joint Resources and Waste Strategy



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Further contact information

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Tel: 0208 871 2788

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www.wrwa.gov.uk/strategy

INTRODUCTION

This document provides an assessment of equalities impacts in relation to the Joint Resources and Waste Strategy for the London Borough of Hammersmith & Fulham, the London Borough of Lambeth, the Royal Borough of Kensington and Chelsea, the London Borough of Wandsworth and Western Riverside Waste Authority – collectively referred to as the Western Riverside Partners.

The Western Riverside Partners work together to reuse, collect, sort, recycle, treat and dispose of waste in the area. Together the Partners want to reduce their environmental footprint by:

- Producing less waste.
- Moving to a Circular Economy by keeping materials and things in use for as long as possible through repairing, sharing and reuse.
- Making it easier for our residents and businesses to recycle more.

Our Vision:

“The Western Riverside partners will work together with our residents and businesses to prioritise waste prevention, reduce our carbon emissions and environmental impacts, and provide customer focused waste and recycling services that maximise value from the materials we manage.”

To achieve the vision the Western Riverside Partners developed a Strategy aimed at reviewing the current policy situation and defining a collective ambition for waste management services spanning from 2025 to 2040. This involved extensive analysis of the current baseline position for collection services across the area, developing future options for collection, treatment, and disposal, and assessing the whole system cost of these options. Collaboration with the Partner Authorities through a series of workshops for officers, directors, and elected members facilitated the integration of multiple perspectives and expert inputs, ensuring that the draft Strategy was robust and inclusive. A public consultation on the draft strategy which included a survey, focus groups and raising awareness via social media, emails and word of mouth was conducted between Monday 4th September and Monday 14th October. Feedback from the consultation has been used to update the draft strategy and this Equality Impact Assessment.

EQUALITY IMPACT ASSESSMENT

The Equality Impact Assessment (EqIA) is a critical component of policy-making in the UK, ensuring that decisions consider their potential impact on individuals with protected characteristics as defined by the Equality Act 2010 which include:

- Age
- Disability
- Gender Reassignment
- Marriage and Civil Partnership
- Pregnancy and Maternity
- Race
- Religion or Belief

- Sex
- Sexual Orientation

The duty of 'due regard' requires decision-makers to actively consider equality implications before and during policy development and to remain mindful of these considerations when making decisions. This proactive approach helps to eliminate discrimination, promote equality of opportunity, and foster good relations between different groups.

This EqIA examines the Strategy, evaluating its potential impacts on various protected groups and ensuring that the strategy promotes inclusive and equitable outcomes for all stakeholders.

The Western Riverside Partners wished to hear and proactively consider any comments in relation to how any aspect of the issues presented within the draft strategy may impact on any sections of the community as listed above. Feedback from the public consultation was used to inform this full Equality Impact Assessment and the final version of the Strategy.

It should be noted that although the Strategy sets out that within the proposed Action Plans there will be a need to deliver service improvement and changes these will be designed according to local needs and will be subject to individual EqIA conducted by the relevant Partner Authority.

SUMMARY OF EVIDENCE

To ensure 'due regard' is given to the Public Sector Equality Duty (PSED), the following evidence has been considered:

- Final Joint Resources and Waste Strategy (updated post consultation)
- Consultation findings
- The Social Value Model and related government guidance
- The Equality Act 2010
- Feedback from stakeholder engagement sessions with Technical Officers and Elected Members
- Data on local demographics and waste management needs

This evidence-based approach helps identify how the Strategy might affect different groups and develop strategies to mitigate any negative impacts.

WHO IS AFFECTED BY THE JOINT RESOURCES AND WASTE STRATEGY?

The Strategy will affect all residents within the Partner Authorities' area, any businesses that use the waste and recycling services of the Partner Authorities and any staff involved in the delivery of services.

CONSULTATION

A fully compliant consultation was undertaken in Autumn 2024. Equalities impacts and monitoring were included in the consultation. Following the consultation, feedback received

was included within a consultation report which is available on the WRWA website strategy page.

The WRWA Partners considered equalities for the development of the Strategy and delivery of the consultation in a number of ways including:

- Provision of paper copies of the Strategy and consultation for those without access to the internet. Access to paper copies of the consultation survey and strategy were available on request. Posters and leaflets advertising the consultation and providing a telephone contact number were available from local libraries and the Western Riverside Waste Authority.
- Focus groups were designed to be representative of the diverse communities in the area and took into consideration protected characteristics.
- Individuals requiring a different form of support in order to participate in the consultation were encouraged to email, telephone or write to Western Riverside Waste Authority.
- The consultation was published widely via a number of social media platforms but also via email to housing associations, business improvement districts and community groups.

IMPACT ON PROTECTED CHARACTERISTICS

This section evaluates the implications of the final Strategy (post consultation) on protected characteristics, ensuring inclusivity and accessibility across diverse demographic groups.

Table 1: Initial assessment of the implications of the Draft Joint Strategy on protected characteristics

Protected Characteristic	Negative Impact	Positive Impact	No Impact	Unsure of Impact	Comments
Age			X		<p>The Strategy acknowledges the importance of waste management services being accessible to all age groups. Initiatives include enhancing accessibility to recycling facilities and tailored educational programs for schools and youth groups.</p> <p>Potential challenges for older adults due to mobility issues are addressed through targeted communication strategies, and accessible services such as assisted collections.</p>
Disability			X		<p>The Strategy aims to make waste management services accessible to individuals with disabilities. Measures include providing large print and easy-to-read materials and ensuring physical facilities are accessible. Consultation with disability advocacy groups helps develop tailored solutions, such as assisted waste collection services.</p>
Gender reassignment			X		<p>Although not directly addressed, the strategy remains neutral and inclusive. Communication and engagement activities use inclusive language, avoiding discrimination based on gender identity. Stakeholder feedback is encouraged to address any specific issues related to this group.</p>
Marriage and civil partnership			X		<p>While no specific provisions exist, the Strategy ensures equal access to waste management services regardless of marital status.</p> <p>No adverse impacts are anticipated for this characteristic.</p>

Protected Characteristic	Negative Impact	Positive Impact	No Impact	Unsure of Impact	Comments
Pregnancy and maternity			X		Support services for pregnant women and new mothers are recognised. Flexible waste collection schedules and additional support for households with newborns such as 'real nappies' are included. Information and resources will be accessible to support effective household waste management.
Race			X		The Strategy aims to include all racial and ethnic groups within the WRWA area. Language barriers are addressed through document translation (where individual Councils take this approach). Outreach programs engage ethnic minority communities to address their specific needs and concerns.
Religion or belief			X		Sensitivity to diverse religious practices is maintained. Waste management schedules avoid disadvantaging any religious group. Special provisions are made for religious festivals generating increased waste.
Sex			X		No differential impacts based on sex are anticipated. Equal opportunities for all genders accessing waste management services are ensured. Gender-sensitive communication strategies will be employed.
Sexual Orientation			X		All sexual orientations are included without discrimination. Feedback from LGBTQ+ communities is encouraged to identify specific needs or issues.

STRATEGIES FOR MITIGATION AND INCLUSION

Inclusive Communication

To ensure that all stakeholders are adequately informed and can participate in the Strategy and action plans, the WRWA Partners will implement a range of communication methods. This includes producing materials in accessible formats (large print, easy-read, audio where required) and translating key documents into multiple languages (where required). Additionally, the use of social media and local community networks will help reach a broader audience.

Targeted Engagement

Recognising that different groups may have unique needs, the WRWA Partners will conduct targeted engagement activities during the implementation of the strategy and action plans to ensure the strategy addresses the needs of all community members.

Flexible Service Provision

The Strategy proposes flexible waste management services to accommodate the diverse needs of the community. This includes options such as assisted waste collection for individuals with mobility issues, additional support for new mothers, and consideration of religious practices in scheduling waste collection. As mentioned previously individual actions arising from the Strategy will undergo their own specific EqIA.

Monitoring and Review

The impact of the Strategy on protected characteristics will be continuously monitored. Regular reviews and updates will be conducted to ensure that the strategy remains inclusive and effective. Stakeholder feedback will be a critical component of this process, and adjustments will be made as necessary to address any emerging issues.

CONCLUSIONS

The EQIA for the Strategy demonstrates a commitment to inclusivity and equality. By proactively considering the impacts on various protected groups and implementing targeted strategies to mitigate any negative effects, the Strategy aims to promote equitable access to waste management services for all community members. Continuous monitoring and stakeholder engagement will ensure that the Strategy evolves to meet the changing needs of the community, fostering a more inclusive and sustainable waste management system.

Agenda Item 8

LONDON BOROUGH OF HAMMERSMITH & FULHAM

Report to: Cabinet

Date: 13/01/2025

Subject: Tree Strategy adoption

Report of: Councillor Sharon Holder, Cabinet Member for Public Realm

Report author: Ian Hawthorn, Assistant Director Highways

Responsible Director: Bram Kainth, Executive Director of Place

SUMMARY

This report outlines the development of the first tree strategy for Hammersmith & Fulham, detailing the outcome of consultation and reasons for adoption.

RECOMMENDATIONS

1. To agree the formal adoption of the H&F Tree Strategy and associated action plan.
-

Wards Affected: All

Our Values	Summary of how this report aligns to the H&F Corporate Plan and the H&F Values
Building shared prosperity	Promoting tree planting, community engagement and better urban forest management. All of which are evidenced to increase sustainability, improve aesthetics and to boost the economy and in-turn build prosperity within the borough and public realm.
Creating a compassionate and inclusive council	Developing active citizenship with residents and stakeholders, improving communication, and promoting an environmentally aware community that supports the council's ambition of being the greenest borough.
Doing things with local residents, not to them	Outlining active and strategic engagement with our residents that improves their quality of life such as educational events, walks, tree planting days and annual residents' surveys to foster the relationship between council and the community.
Being ruthlessly financially efficient	Identifying methods of acquiring external funding and cost saving strategies such as a consistent and effective funding application process, the development of our tree donation program, working with external partners to reduce the cost of planting and improving internal procedures to ensure less trees are lost, less money is

Our Values	Summary of how this report aligns to the H&F Corporate Plan and the H&F Values
	spent on their replacement and more trees are planted through for the benefits of all
Taking pride in H&F	By increasing canopy cover and environmental awareness, the strategy provides the environment required for residents to be proud of their borough. We demonstrate high aspirations by outlining the means to increase our canopy cover to meet target for England proposed by the EIP, ahead of the timeline they have proposed. We provide the platform for residents to play active roles in achieving said targets, fostering pride and shared equity in their borough.
Rising to the challenge of the climate and ecological emergency	The tree strategy, guided by emerging policy, internal strategies and several external partners outlines a shift towards ambitious, strategic and proactive tree management with the primary vision of becoming the greenest borough. These targets paired with internal policies, such as prioritising native tree planting and proactive tree planting, aligns with the Climate and Ecology Strategy and the Environmental Improvement Plan 2023. This supports the credibility of our targets and ensures the most current policy is adhered to, to combat the climate and ecological emergency as effectively as possible.

Financial Impact

The proposed tree strategy sets out our plans to work with residents and partners to preserve, increase and improve our trees. The strategy is supported by an action plan to deliver these aims and includes 40 actions requiring an estimated additional investment of £1.027m over the next decade (approximately £0.600m of this investment will be required in the first 5 years with the remaining £0.427m being required over a longer period of time). This funding will be secured (by way of external grants, developer contributions and S106 funding) and will be included in the revenue and capital financial plans of the Council.

Kellie Gooch, Head of Finance (Place), 25 November 2024

Verified by James Newman, Assistant Director – Finance (Deputy s151), 25 November 2024

Legal Implications

The Council has duties under the Town and Country Planning Act 1990 in relation to trees which include the powers to require provisions for the preservation and planting of trees when granting planning permissions and the making of tree preservation orders. It also has duties under the Highways Act 1980 to maintain highways within its area which includes the duty to maintain trees within the boundaries of highways. The planting and maintenance of trees also plays a key role in enhancing and preserving the urban environment.

The tree strategy will assist and enable the Council in undertaking these functions.

Background Papers Used in Preparing This Report

None

DETAILED ANALYSIS

Background to the development of the tree strategy

1. The H&F tree strategy provides a roadmap for how the council can improve its tree management, increase canopy cover, and improve the service for residents, achieving shared targets and improving the quality of life of the constituent, which is supported by the annual 2024 report on health in cities by Professor Chris Whitty, which emphasises the important role of trees in cities.
2. The tree strategy development was led by highways, however it is a borough wide strategy that covers all council owned land and is being supported by the relevant Parks and Housing teams, along with the Climate Change Team and Planning Team and a range of external partners.
3. The strategy was developed using guidance from the newly published Tree and Woodland Strategy Toolkit (TAWS), developed by The Tree Council and commissioned by DEFRA. The Tree Council have helped to guide the strategy directly reviewing the strategy.
4. The tree strategy is from 2024 to 2030, which aligns with the Environmental Improvement Plan 2023 (EIP), along with the councils Climate and Ecology Strategy. This period of six years will allow us to research our current tree stock, implement the action plan and achieve our targets. This will pave the way for new, greater targets that will be guided by the 2030 review of EIP, as well as the learnings through the monitoring and evaluation of the strategy.

Vision and objectives of the tree strategy

5. The vision for the tree strategy is to contribute to becoming the greenest borough.
6. To meet the vision there are three key objectives, to increase canopy cover from 14% to 16.5%, to preserve and improve current tree stock and to work closer with residents and businesses.
7. To determine how to meet these three objectives, the objectives are supported by twelve key areas for development, and its these twelve areas that form the action plan for the tree strategy. The areas are, opportunity mapping, legacy planting, funding, private land increasing biodiversity, developing policy, development opportunities, training, communication, community projects, education and community engagement.

Delivery of the tree strategy

8. The strategy is supported by an action plan, with 40 actions designed to deliver the three objectives to meet the vision.
9. The actions are set to a time frame, with a department lead, and are costed. We use an action plan framework already used effectively internally. By specifying these details, it ensures the targets are specific, measurable, achievable, realistic, and timely (SMART).
10. The tree strategy will be available in an accessible format when adopted. The tree strategy and action plan are currently being formatted into accessible versions and will be completed by December 2024.

Reasons for Decision

11. Recommendation that Hammersmith & Fulham adopt the tree strategy to ensure the council rises to its ambition of being the greenest borough but meets its duties regarding tree management and ensures that we work with communities and stakeholders to grow our tree cover.

Equality Implications

12. An Equalities Impact Assessment (EIA) has been carried out, in relation to the Tree Strategy, and it shows neutral impacts of the planning guidance on that share protected characteristics.
13. The EIA assists the Council in demonstrating compliance with its public sector equality duty under Section 149 of the Equality Act 2010.

Yvonne Okiyo, Strategic Lead EDI, 2 December 2024

Risk Management Implications

14. There are no significant risks identified for this initiative.

Jules Binney, Risk and Assurance Manager, 22 November 2024

Climate and Ecological Emergency Implications

15. The council declared a climate and ecological emergency in 2019. Additionally, as a public body, the council must act to conserve and enhance biodiversity as part of the strengthened Biodiversity Duty (Environment Act 2021). The tree strategy will help the council to create a climate resilient borough by increasing canopy cover, sequestering carbon and improving air quality. Green corridors will be developed through street tree planting and wildlife will be supported through the planting of native tree species where appropriate.

Phoebe Shaw Stewart, Ecology Lead, 14 November 2024

Consultation

16. A public consultation was conducted between 7/5/24 to the 7/6/24 on H&F's 'have your say' engagement platform. Of the 228 responses, 202 (88.6%) supported the vision of the strategy and 186 (81.6%) supported the three main objectives.
17. From the consultation, when asked "Is there anything else you would like to see in the tree strategy that you think is missing?" 22 of 166 responses stated that there should be more tree planting and 6 stated that targets should be more ambitious. Through an internal review of tree planting capacity and consultation with key actors, it was agreed that the targets for tree planting were achievable. It is outlined that this tree strategy (2024-2030) is the precursor that builds the systems and processes for more ambitious targets relating to tree planting in the future.

LIST OF APPENDICES

Appendix 1 – Tree Strategy

Appendix 2 – Tree Strategy Action Plan

Appendix 3 - H&F Equality Impact Analysis Tool

Tree Strategy 2024- 2030

APPENDIX 1

London Borough of Hammersmith & Fulham

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1.0 Foreword

To be added after the tree strategy has been formally adopted and approved by the council in 2024.

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2.0 Introduction

The benefits of trees, woodlands, and green spaces are extensive. They combat the effects of climate change, increase biodiversity, provide habitats, boost the local economy, improve air quality, regulate temperature, preserve heritage

and historical value, and improve the health and well-being of local communities¹.

The broad range of benefits provided by trees offer nature-based solutions to the adversity of urban life. They boost local

natural capital and contribute to the wider climate change agenda, whilst ultimately, improving the lives of our residents

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Water Attenuation



Climate Resilience



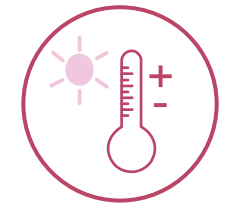
Water Quality



Aesthetics



Resource Efficiency



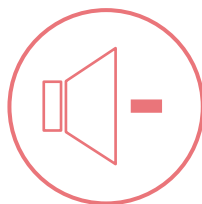
Temperature Regulation



Well-being and Amenity



Biodiversity



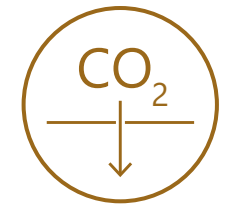
Noise Reduction



Air Quality



Economic Benefits



Carbon Sequestration and Storage

Figure 1. Benefits of trees

2.1 Introduction

Hammersmith & Fulham council (H&F) is responsible for over 27,000 trees located in parks, housing estates, tenanted properties, cemeteries, council owned schools and on the public highway. As the Local Planning Authority, the council also maintains authority over the statutory protection of trees and has a key influence of the planting of new trees in development on private land and the planting of new trees in development. There are estimated to be 45,000 trees on privately owned sites. To ensure that we manage and protect these trees to the highest standard, a strategic approach to tree management should be adopted. This view is supported by DEFRA's [England Tree Action Plan](#), the Mayor and the Forestry Commission's [London Tree and Woodland Framework and Supplementary Planning Guidance](#), the

Government's [25 Year Environmental Plan \(EIP\)](#), Biodiversity Net Gain legislation, and the Tree Councils' [Tree and Woodland Strategy Toolkit](#).

This vision for this strategy is informed by policies, evidence and data, and outlines a road map on how we aim to achieve it by 2030. This 5-year timeframe aligns with emerging policy and strategies such as the EIP 5-year review process, [H&F Climate and Ecology Strategy 2030](#), and the Local Nature Recovery Strategy that is expected to be published in 2025. This allows us to adapt our actions and targets based on shared goals, whilst ensuring they remain specific, measurable, achievable, relevant and time-bound, or SMART.

As our first tree strategy, we are focusing on developing a robust foundation of research and evidence whilst developing procedures that pave the way for a future of strategic tree management. Where this strategy sets aims for the future, it is designed to work alongside our tree policies²; documents that outline how we routinely manage our urban forest. This strategy demonstrates our commitment to our biodiversity duty, as outlined in the [Environment Act \(2021\)](#), and to pledges made in the [2022 Hammersmith and Fulham Labour Manifesto](#). Furthermore, it demonstrates our commitment to plant more trees, create more greenspaces, and continue to green the grey with the right tree, in the right place, at the right time in the right way.

3.0 Our Urban Forest

In preparation for this strategy, a borough-wide I-Tree Canopy survey was carried out. This concluded that the borough has a lower-than-average canopy cover of 14%, compared to the London average of 21%³. H&F commissioned a mapping project by Gentian, as well as a review of our own data. This research revealed that there are more than 27,000 council maintained and owned trees, and more than 45,000 privately owned trees. These trees contribute to recreational and environmental benefits, and have an estimated total value of £326 million, including a carbon storage value of £10 million and a temperature regulation value of £12 million⁴. The I-Tree Canopy survey concluded that canopy cover provided by our urban forest sequesters 1.62/5.94Kt of C/CO₂ annually and stores a total 40.66/149.07Kt of C/CO₂, with an annual value of £371,561 and a total value of £9,331,303. This is equivalent to the carbon emissions generated when powering more than 7000 homes for a year.

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H&F maintained trees are managed using an asset management system which ensures that all inspections of, and works to, H&F maintained and owned trees are recorded. H&F recently

integrated carbon storage and the Capital Asset Valuation of Amenity Trees (CAVAT) value into this system. This demonstrates our commitment to Policy G7 section C of the London Plan (2021) and in time, will give us a monetary value for individual trees that will support our efforts to protect our urban forest.

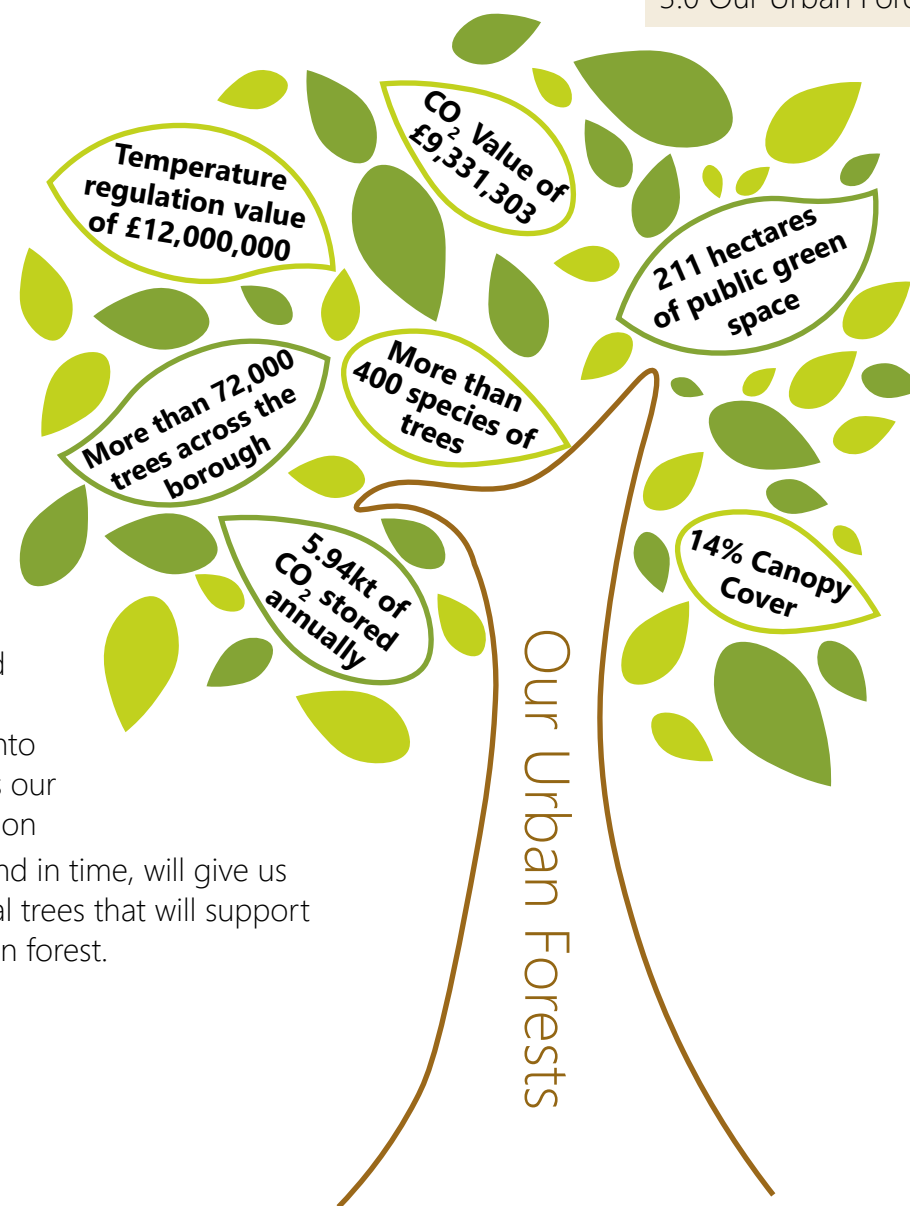
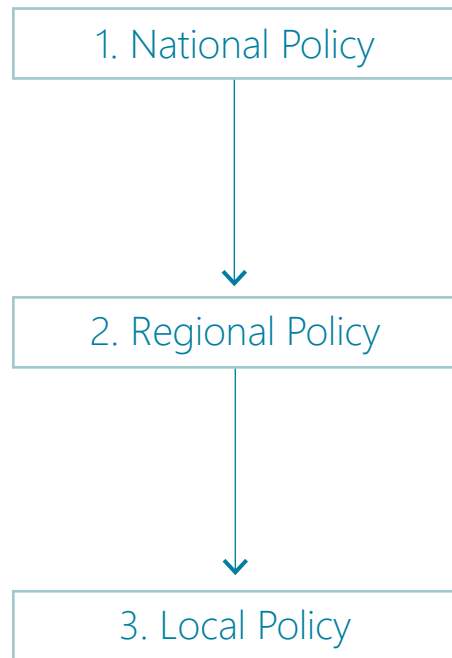


Figure 2. The value of H&F's Urban Forest

4.0 Our Policies and Strategies

The way in which H&F manages its tree assets, or those afforded statutory protection, is governed by national and local policy. This section outlines the policy drivers that inform this strategy.

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1. National Policy

- The National Planning Policy Framework⁴ (Department for Communities and Local Government, 2023) sets out the Government’s planning policies for England and how these are expected to be applied.
- The framework is a guideline for the preparation of local and neighbourhood plans and is a material consideration in planning decisions.
- Under the title ‘Achieving sustainable development’ and ‘Meeting the challenge of climate change, flooding and coastal change’ the document outlines the role for trees in meeting these challenges.

- Greening and trees are part of several policies in the London Plan such as policy G1 Green Infrastructure, policy G5 Urban G7 Trees & Woodlands and policy G8 Public Realm which highlights the importance of protecting London’s urban forests and woodlands.

2. Regional Policy

- The London Plan⁵ (GLA, 2021) produced by the Greater London Authority promotes economic development and wealth creation, social development, and improvements to the environment.

3. Local Policy

- The Hammersmith and Fulham Local Plan⁶ is used to help shape the future of the borough and to determine individual planning applications and deliver development.
- Local Plan Policy OS5 is specific to greening the borough. In relation to trees it seeks to prevent removal of existing trees and provision of new trees on development sites; adding to the greening of streets and the public realm; and making Tree Preservation Orders where justified in the interests of amenity.

4.1 Other Policies and Strategies

In addition to key policy drivers, the council has several strategies that whilst they are not focused directly on trees, have shared targets and themes. These include the Climate and Ecological Strategy, Air Quality Action Plan, and the Parks and Open Spaces Strategy.

H&F 2030 Climate and Ecology Strategy⁸

- The strategy sets out plans to tackle the combined threat of the climate and ecological emergency. Trees are essential to delivering on two of the strategy's five challenges, Ecology and Adapting to Climate Change.
- Key shared objectives include better understanding our biodiversity, improving our greenspaces and 'greening the grey'.
- Further guidance is offered in the Climate Change SPD¹¹.

H&F Air Quality Action Plan (AQAP)⁹

- The AQAP requires arboricultural and greening policies which are promoted in the Local Plan and Supplementary Planning Documents (SPDs);
- These include the council to phase tree pruning on certain roads; for the council to increase tree, hedge and grass planting on council-owned land; and for the council to seek ways of maintaining mature tree cover when planning for new development.

H&F Parks and Open Space Strategy¹⁰

- This strategy promotes the importance of improving and enhancing green spaces.
- Six of the visions relate to trees, protect existing open space; providing open spaces, play spaces and access to local biodiversity; creating safe, attractive and accessible spaces for all; improving the standard of management and maintenance; actively involving the community in their local open spaces; and increasing participation in open spaces.

4.2 Tree Policies

The tree strategy sets out aims for the strategic management of our urban forest in the future, our tree policies outline why and how H&F council practices routine tree management. These include policies for tree management on highways, parks, and housing sites, as well as information on the management of trees on private land.

All our tree management and operations are governed by guiding legislation and standards including the [Highways Act \(1980\)](#), [Town and Country Planning Act \(1990\)](#), [Wildlife Act \(1981\)](#) and British Standards, BS3998:2010, BS3998:2012, and BS8545:2014 and informed by the Common Sense Risk Management of Trees by the [National Tree Safety Group](#).

Our core policies include:

1. Tree replacement

We commit to replacing any council owned trees that we remove assuming the location is viable, based on the principle of planting the right tree in the right place.

2. Tree inspection

We inspect all our trees every three years, in-line with our cyclical inspection regime.

3. Tree pruning and pollards

We prune our pollarded trees every three years, in-line with London Tree Officers Association Risk Limitation Strategy (LTOA).

Please refer to our full [Tree Policy](#) and our FAQ for more details on routine tree management policies.

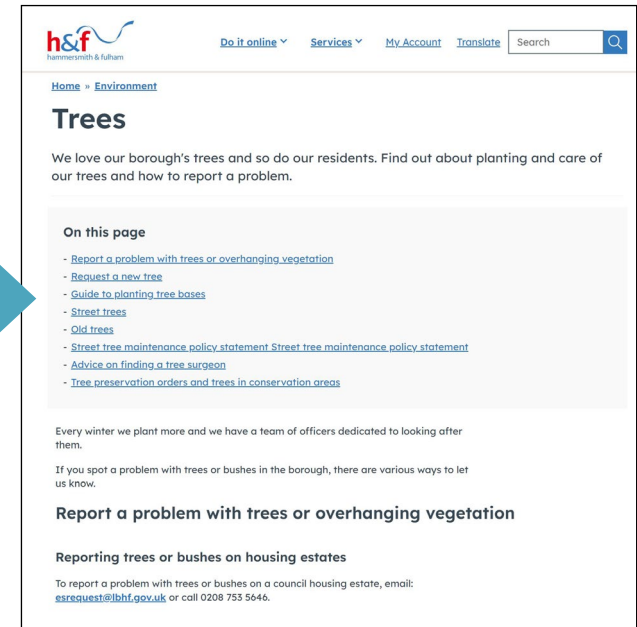
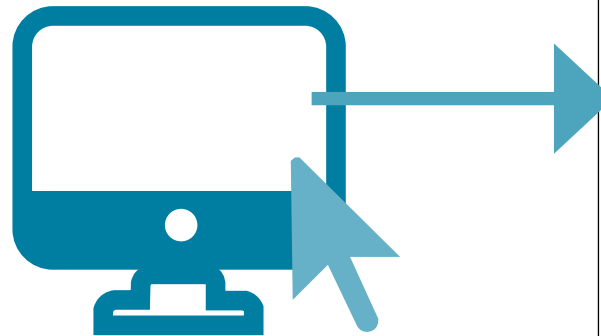


Figure 3. H&F tree policies available on the Council website

5.0 The Vision

5.1 Vision

At H&F we see a future that is green and sustainable. Our vision is to work closely with our stakeholders to improve the green infrastructure in our borough, preserving and expanding our urban forest for the benefit of all, and to contribute to becoming the greenest borough.

This is a long term goal, however, the development of a tree strategy provides a road map to achieve specific objectives on a 5 year timeline designed to improve the lives of our communities whilst paving the way for a greener future.

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Objective 1



Increasing canopy cover

Objective 2



Preserving and improving our trees

Objective 3



Working with residents and stakeholders

5.2 The Vision Explained



Figure 4. Vision to action plan diagram.

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[The Natural Capital Account](#) (NCA) reported that in 2017 that LBHF had some of the least publicly accessible greenspaces in London. Similarly, an I-Tree Canopy study concluded the canopy cover in LBHF is below the London average. The vision for this strategy will drive us to address this and deliver our obligations under the [Environment Act](#) (2021) to uphold our biodiversity duty, the [Natural Environment and Rural Communities Act](#) (2006) (s40: duty to conserve biodiversity) and to target aims outlined in The Environmental Improvement Plan 2023; ‘to leave

our environment in a better condition than when inherited it’, the first revision of the Governments 25-year Environment Plan.

The need for planned and integrated green infrastructure management is outlined in Chapter 8 of the London Plan 2021 and The Preparing Borough Tree and Woodland Strategies SPG. This planned approach is also outlined in the [UN’s Sustainable Development Goals](#) 11, 13 and 15, demonstrating the global agenda and how strategic management at a local level can be

the most effective way to contribute to regional and national environmental targets, and to rise to the challenge of the climate and ecological emergency.

6.0 Delivering the Vision

From a service review and research into how to meet our vision for trees in H&F, three objectives have been identified. In this chapter the three objectives are discussed in detail.

6.1 Objective 1



Increasing canopy cover from 14% - 16.5% by 2030

The Environment Improvement Plan 2030, upheld by the Environment Act (2021), sets targets to achieve England-wide canopy cover average of 16.5% by 2050. However, to achieve our vision, we have set the aim to increase our canopy cover from 14% to 16.5% by 2030, to align closer with the London average tree canopy cover of 21% (18% inner London – 21% outer London) and the long-term aim to achieve 23% by 2050.

Through data analysis, we know we must plant at least 195 new trees per year over the next 5 years to reach our target. To achieve this, we have identified four key areas to focus on. We must map opportunities for planting new trees, we must maximise our use of external funding opportunities and we need to plant whips, hedge rows and 'tiny forests' to contribute to future canopy cover gains.



a. Opportunity mapping



b. Funding



c. Legacy planting



d. Private land

6.1.1 Opportunity Mapping

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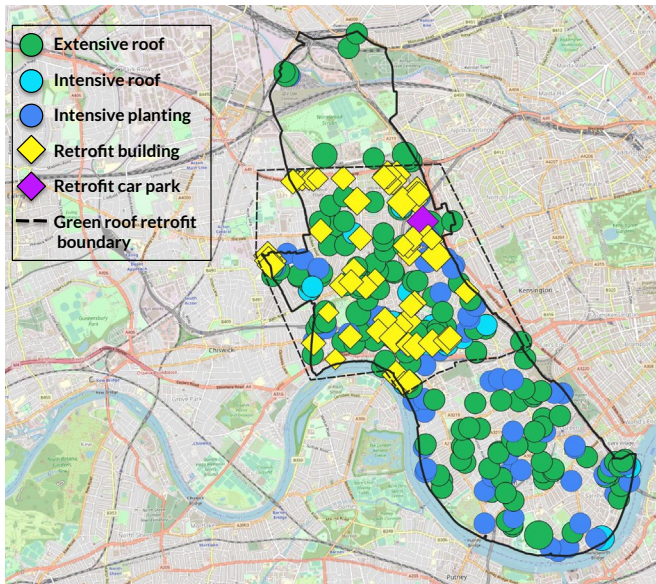


Figure 5. Greenroof opportunity mapping by Gentian

Research base

In 2022, Gentian conducted an opportunity mapping exercise for green roof and retrofitting opportunities in H&F. We want to build on this to map opportunities for tree planting. Using the Woodland Trust's Tree Equity UK map to ensure areas are prioritised equitably.

[Tree Equity Score](#)



Increasing canopy cover from 14% - 16.5% by 2030



a. Opportunity mapping



b. Funding



c. Legacy planting



d. Private land

There is limited space for large scale tree planting in an urban setting, therefore we need to identify all the constraints and opportunities to plant trees and to programme these into proactive planting schemes. This will ensure that areas such as soft verges or parks that are suitable for planting are done so proactively, vacant tree pits are utilised and land-use changes (i.e. build-outs, planters etc.) are considered when no easy wins are present.

Undertake borough-wide opportunity mapping

Develop a process to identify planting opportunities and record them in order of viability with a view to plant them. This includes locating vacant pits and grass verges and land use changes such as highway build-outs. Prioritise these in terms of maximising benefits and environmental equality, whilst ensuring pavements and paths are fully accessible.

Develop a borough wide trial tree pit programme

Develop a programme for systematically and proactively assessing streets for new trees through trial pits and encouraging residents to plant in open tree pits.

Implement an annual tree planting quota of at least 195 standard trees

Implement the target of planting at least 195 standards per year to achieve a 2.5% canopy cover increase by 2030.

6.1.2 Funding

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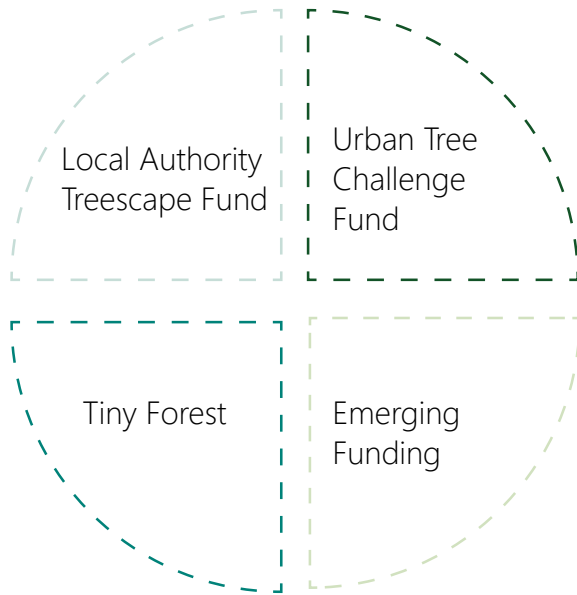


Figure 6. Examples of available funding.

Research base

Multiple funding opportunities have been made available to local authorities from central government.

Although these are subject to change, H&F has already been successful in multiple funding bids, including planting three Tiny Forests and planting multiple using UTCF funding.



Increasing canopy cover from 14% - 16.5% by 2030

- a. Opportunity mapping
- b. Funding**
- c. Legacy planting
- d. Private land



Securing funding is required to achieve the objectives of the strategy. In the current financial climate this will be difficult, however through being proactive in securing external funding, improving the way we work with residents and businesses, and joint working between council departments, residents, and local businesses, we can increase the funding available to help us realise our vision.



Tree donation programme

Establish a tree donation programme to subsidise and support planting through community donations and involvement. This may include third party organizations such as Trees for Streets, Woodland Trust or may be developed internally.

External funding working group

Formalise a working group dedicated to maximising external funding acquisition to best make use grants and external support. Funding sources will include government grants, social value, biodiversity net gain credits and donations from corporate groups such as the Climate Alliance. It will also include funding through the planning process such as S106/CIL.

Develop collaboration with local businesses through the Climate Alliance

Offering donation opportunities for local businesses to help deliver shared green targets.

6.1.3 Legacy Planting



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Figure 7. Legacy Planting.

Research base

London’s first ever Tiny Forest was planted in White City in partnership with Earth Watch Europe. The forest consists of 600 trees and shrubs and will join a future collective of more than 3000 Tiny forests around the world.

[Tiny Forest in Hammersmith Park](#)



Increasing canopy cover from 14% - 16.5% by 2030



a. Opportunity mapping



b. Funding



c. Legacy planting



d. Private land



Whilst we aim to increase our canopy cover over the next 5 years through the planting of standard sized trees, we recognise that any saplings, whips, and tiny forests we plant today will contribute to canopy cover in the future.

Whilst delivering on planting to create a legacy of increasing canopy cover, we must also ensure survival rates are high.



Plant 5 tiny forests

Ensure we plant at least 1 tiny forest per year until 2030 to realise long-term canopy cover increases.

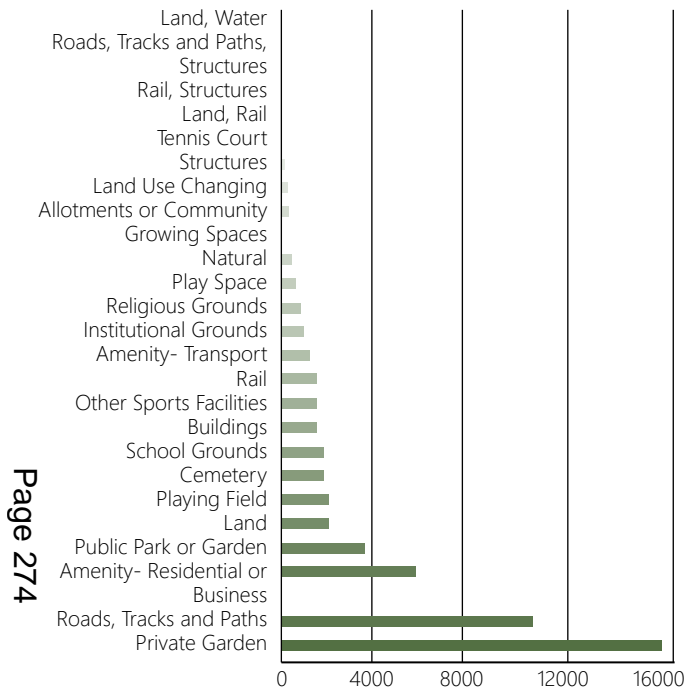
Develop a whip management plan

Ensure tiny forests, tree give-aways and other whip planting projects are mapped so they can be managed, and their survival rates improved.

Create new green corridors and hedgerows

Plant 100 additional whips per year to build connectivity through green corridors and contribute to long-term canopy cover and biodiversity.

6.1.4 Private Land



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Figure 8. Tree count per land use bar graph.

Research base

In 2023, Gentian, a software platform carried out several assessments for H&F to provide insights on existing green infrastructure. These included:

- A survey of green roofs and retrofit opportunities for green roofs.
- Tree count analysis of the borough.
- Survey of green space on private land.



Increasing canopy cover from 14% - 16.5% by 2030



a. Opportunity mapping



b. Funding



c. Legacy planting



d. Private land



A significant proportion of our urban forest is on private land. This includes but is not limited to the corridors created by transport links, privately owned green space, brownfield sites and residential gardens. Similarly, we share boundaries with neighbouring boroughs and third parties. We see this as an opportunity to collaborate with such organizations, authorities, and landowners to achieve shared biodiversity recovery objectives.



Develop working relationships with private landowners

Develop a plan to improve collaboration with private landowners such as Transport for London (TfL), National Rail (NR), local businesses, landowners and adjacent Local Authorities (LA) to achieve strategy objectives on private land.

Annual tree/whip giveaway

Maintain and promote our annual tree giveaway, pairing it with educational workshops to encourage planting on private land and increasing awareness.

I-Tree Eco report

Expand on ecosystem service data to include borough wide data to inform strategy targets.

6.2 Objective 2



Preserving and improving our trees

Whilst we aim to add to our urban forest, we must also ensure we preserve our existing urban forest, so that it can be resilient to invasive species, adapt to the changing climatic condition, and regeneration of our borough.

In addition, we must ensure that we plant the correct species that not only improve local biodiversity but can survive in the adverse urban conditions that we experience, such as extreme heat, drought, and flooding.

To do this, we must adhere to the best management practice of our trees and update our policies and practices to reflect this. We must also ensure that those regenerating parts of borough also do this.



a. Increasing biodiversity



b. Development opportunities

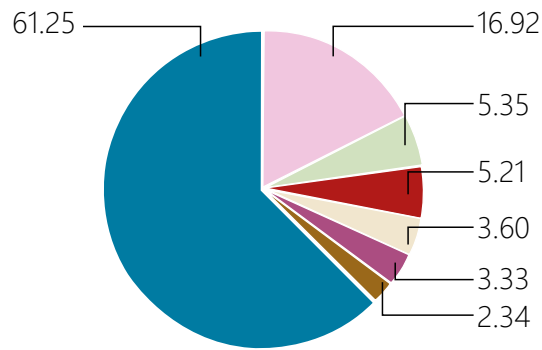


c. Developing policy



d. Training

6.2.1 Increasing Biodiversity



- London Plane
- Cherry
- Other
- Pear
- Lime
- Maple
- Rowan

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Figure 9. Percentage of species among H&F managed trees.

Research base

Assessment of H&F data determined the taxonomic diversity of council owned trees. It concluded that our urban forest is dominated by 12%, 24% and 40% of a particular species, genus and family, exceeding recommendations outlined in the 10% rule of 10%, 20% and 30% taxonomic diversity.

[Trees for urban planting](#)



Preserving and improving our trees



a. Increasing biodiversity



b. Development opportunities



c. Developing policy



d. Training

We recognise the significance of trees in achieving the goals shared by the Climate and Ecology Strategy, the Air Quality Plan and wider biodiversity targets. Through strategic, collaborative and an operational approach, we can protect, preserve, and improve our tree stock to improve local biodiversity and wildlife, and build climate resilience as part of our biodiversity duty.

Develop a replacement tree standard

We aim to develop a tree replacement standard that moves away from like-for-like replacement and towards maximum compensation for trees lost through development. This will align closer to with the requirements of Biodiversity Net Gain.

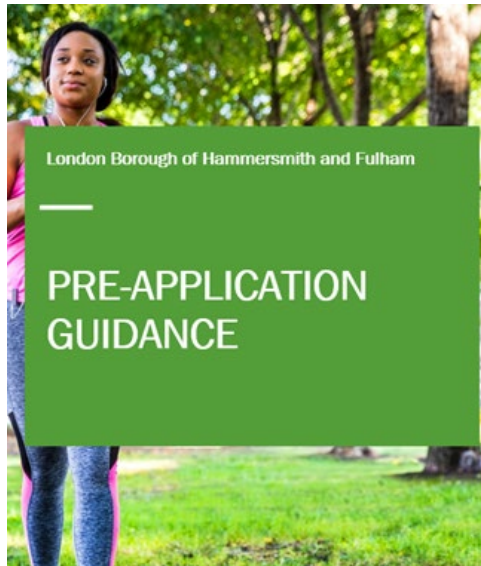
Develop mapping for biosecurity and monitor annually

We aim to develop our mapping of biosecurity hazards and pair this with internal and external educational sessions to increase awareness of potential hazards.

Develop a species selection matrix

This decision-making matrix will inform species selection that best considers climate resilience and biodiversity, with help from tools such as the Forest Research's climate-matching tool. We will also look to establish greater age and species diversity by monitoring these metrics and adjusting practices accordingly.

6.2.2 Development Opportunities



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Figure 10. Front cover of the pre application guidance for developers.

Research base

Biodiversity Net Gain mandates at least 10% net gain of biodiversity on new developments that meet site criteria. Further guidance on this and UGF can be found in the LBHF Climate Change SPD.

[Biodiversity net gain- guidance for developers](#)
[H&F Climate change SPD](#)



Preserving and improving our trees



a. Increasing biodiversity



b. Development opportunities



c. Developing policy



d. Training

With emerging policies such as Biodiversity Net Gain, we recognise that it's important that our green infrastructure is improved and not degraded by development. Planning policy is our primary tool to protect and preserve privately owned trees. By developing internal procedures, we hope to improve our ability to protect trees and influence tree management in a way that best supports our objectives.

Develop trees in planning procedures

We will aim to review all major planning applications and applications that would have an adverse impact on trees with amenity value in order to maximise tree retention and new tree planting opportunities.

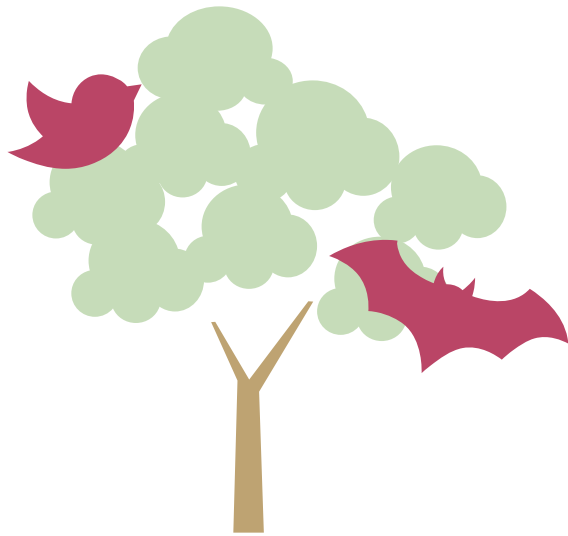
Requirement for on-going maintenance plans and use planning tools to improve green infrastructure on developments.

We will explore ways to require on-going maintenance plans for trees as part of planning applications and use planning mechanisms such as Biodiversity Net Gain (BNG) and the Urban Greening Factor (UGF) to maximise urban greening.

Improve and define pre-application guidance on arboricultural matters

Design pre-application guidance in the form of best management practice FAQ's, toolkits, and drop-in sessions and assist in mapping opportunities for new tree planting on major development schemes and regeneration sites.

6.2.3 Developing Policy



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Figure 11. Produce a veteran tree policy in line with NPPF

Research base

The NPPF suggests that all development plans should protect and enhance biodiversity and that veteran trees should be protected and planning applications that present any significant degradation should be refused.

[NPPF 15 Conserving and enhancing the natural environment](#)



Preserving and improving our trees



a. Increasing biodiversity



b. Development opportunities



c. Developing policy



d. Training

By developing policies in-line with current legislation, such as the protection of veteran trees in the NPPF, we aim to establish policies to inform management that protects our veteran trees, improves carbon storage in the borough and moves towards greater tree retention.

Annual Policy review

Update, review and revise all internal policies annually to ensure best alignment with broader agenda.

Produce a waste management policy for tree waste

Develop a strategy that utilises, minimises, and recycles waste arising from arboricultural operations.

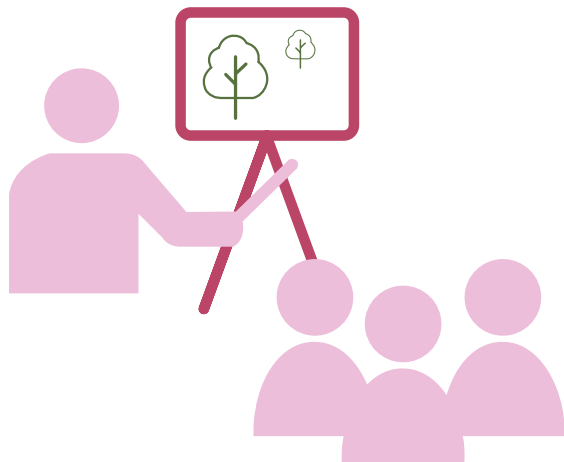
Produce a Veteran Tree Policy

Develop a policy that improves the management of our ancient and/or veteran trees in line with the NPPF.

Replacement tree policy

Inspect all our replacement planting to ensure the tree planting and tree pits exceed standards, using permeable materials or open tree pits for community planting. We will consider all technical solutions when planting and aim to get planting right the first time, with right tree and right place, ensuring survival and reducing future issues with footway accessibility around mature trees and roots.

6.2.4 Training



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Figure 12. Training programme for wider officers and contractors.

Research base

We want to ensure that all our technical officers are trained in-line with current industry standards such as BS3998:2010, BS5837; 2010 and BS8545:2014.

[Standardisation Guidance](#)



Preserving and improving our trees



a. Increasing biodiversity



b. Development opportunities



c. Developing policy



d. Training



Continuous training of arboricultural officers is essential in ensuring best practice in tree management. In addition to arboricultural officers, providing basic arboricultural training to officers who inspect our streets, parks and housing estates and council contractors that work around our trees will ensure that more issues are identified and raised with the arboricultural officers.



Quarterly training meeting with arboricultural team and a strategy focus group

Meeting to discuss current training needs and evaluating key performance indicators of the tree strategy to ensure the strategy is realised.

Training programme for wider officers

Basic training provided inter-departmentally by the arboricultural team. Topics such as basic tree inspections, pest and diseases and good management practices.

Training for contractors

Basic arboricultural training for council contractors working in our streets, parks, and housing estates. Internal procedural training for arboricultural contractors pairing this with increase ecological literacy training.

6.3 Objective 3



Working with residents and partners

Residents, communities, and businesses are key stakeholders in meeting our vision. The urban forest not only provides environmental benefits, but also significant economic and social benefits, therefore we believe it's vital that we continue to foster partnerships with all our stakeholders, and that we build new relationships can benefit our urban forest.

We see communication with all stakeholders as a key element of this strategy. To ensure we deliver on all three objectives we must be more transparent and accountable, informing residents and communities of what we are doing and why. Through improved communication and education on trees, we want to create a service to our communities that raises the importance of our trees and environment.



a. Improving communication



b. Education

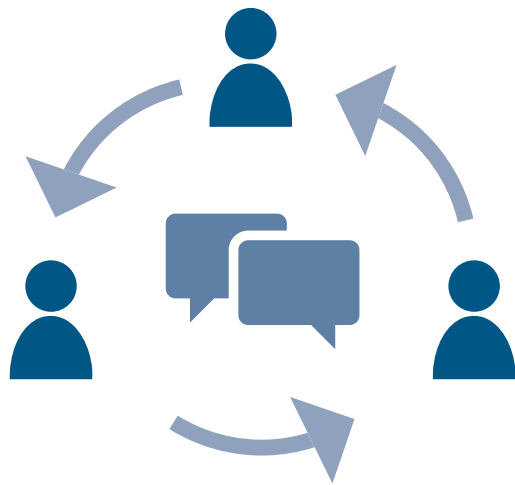


c. Community projects



d. Community engagement

6.3.1 Improving Communication



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Figure 13. Improving communications



Working with residents and partners



a. Improving communication



b. Education



c. Community projects



d. Community engagement

By improving our communications, we hope to keep our residents and stakeholders better informed of our service performance, management updates and key events. We also hope to open lines of communication so we can better understand the needs of our residents and deliver a better service that ultimately improves the quality of life of our residents.

Website information

Update website with Frequently Asked Questions (FAQ) page, report on strategy progress, showcase events and projects, and information on our current and planned works.

Annual resident survey

Conduct an annual survey to collect feedback on our progress.

Guidance for private landowners

Produce a best management practice guide including rights, responsibilities, and legal information for private landowners.

Improve online GIS mapping on statutory protections

Update records to online system to include all TPO's (Tree Preservation Order) and Conservation Areas.

Research base

We want to build on existing GIS tools such as the GLAs ward prioritisation map, and our own data to offer greater accessibility to information for resident and to inform our objectives.

[Tree canopy cover prioritisation tool](#)

6.3.2 Education

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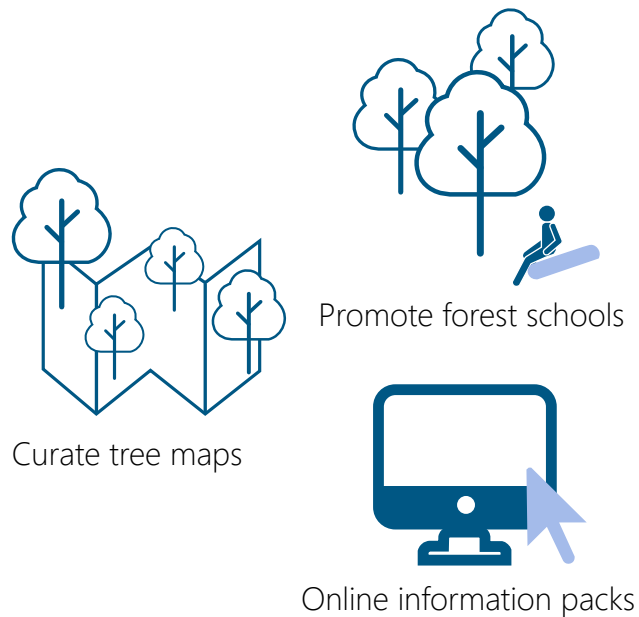


Figure 14. Diagram of education interventions.

Research base

We currently have two magnificent trees on the 'Great Trees of London' list published by Trees for Cities. We want to celebrate these and others by producing curated maps.

[Trees for cities](#)



Working with residents and partners



a. Improving communication



b. Education



c. Community projects



d. Community engagement

We hope that by providing and supporting educational opportunities, we can teach our communities about the wide range of benefits provided by trees and can embed environmentalism into our neighbourhoods. We believe that through increasing awareness we can maximise the benefits and services trees offer to the community and ultimately result in a healthier urban forest.

Promote forest schools

Allocate resources to improving accessibility to forest schools such as active promotion and a formalised booking system.

Curated tree maps

Design public facing mapping that show cases our trees and their benefits, educating stakeholders on the benefits they offer.

Online information packs, events, and resources.

Online information packs on a variety of tree related subjects, resources and events including on-line Q&A sessions.

6.3.3 Community Projects

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Figure 15. H&F local climate and ecological project.

Research base

The Tree Council support a network of Tree Wardens nationwide. We want to create a Tree Warden Network in H&F.

[Become a tree warden](#)



Working with residents and partners



a. Improving communication



b. Education



c. Community projects



d. Community engagement

We recognise the value of citizen led projects. We want to support existing community schemes and aid the design and delivery of new projects. By allocating resources to this we hope to offer stakeholders the tools they need to be successful and maximise the potential benefits to all.

Tree Watering Project

Work with communities to provide support for tree watering and promote tree 'adoption'.

Establish Tree champion/warden scheme

Formalise a warden scheme with support from the Tree Council.

Tenants and resident association project design sessions

Facilitate design of community tree projects and allocate a resource for this.

Support independent community groups

Support the existing work of community groups such as the Tree Keepers of the Tiny Forest projects and engage closer with groups such as Friends of Groups, Resident and Tenant Associations, embedding coproduction in tree works and projects.

6.3.4 Community Engagement

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Figure 16. Local primary school children helping with the Tiny Forests project.

Research base

An I-Tree Eco study provides depth of understanding in terms of the ecosystem services our urban forest provides. It offers the opportunity for residents to collect data and play an active role in research and development.

[i-Tree Eco](#)



Working with residents and partners



a. Improving communication



b. Education



c. Community projects



d. Community engagement



We want to offer events, opportunities, and direct points of contact to engage the community. We want to improve accessibility and ensure environmental equity. This provides a chance for all involved to communicate closely, share our urban green space, and learn from each other. We want to conduct annual surveys to hear more voices and to action more of the views of our residents.



Annual meet and greet

Offering opportunities to meet and greet relevant council officers so we can listen and learn directly from our stakeholders.

Tree and Ecology walk and talks

Offering seasonal walk and talks to explore our urban forest with relevant council officers

Citizen led tree surveys

We want to invite residents to take part in our next I-Tree Eco study and offer other opportunities to get involved in researching our urban forest.

Annual stakeholder survey to inform our development

Conducting annual surveys to listen to and action the opinions of our residents and inform our Key Performance Indicators (KPI).

7.0 Action Plan

Our action plan outlines how we intend to put into place the actions proposed that move us towards our vision. The action plan follows a framework of action, cost, benefit, timescale, responsibility, and review. By doing this we systemize our means of achieving specific and measurable outcomes whilst remaining realistic and accountable. The action plan can be seen in Appendix 1.



Figure 17. Action Plan process

8.0 Review, Development and Monitoring

We commit to reviewing our progress annually with regular check-ins with key stakeholders. To aid this we have developed Key Performance Indicators to evaluate our performance. We also recognise that with emerging policies such as the Local Nature Recovery Strategy (LNRS) and our Climate Adaptation Strategy, we will need to continue development to ensure our targets are appropriate.

Our KPI for objective 1 is a measure of our canopy cover. We currently have 14% canopy cover. Through the course of the delivery of this strategy we aim to achieve 16.5%, based on targets set out in the Environmental Improvement Plan 2025.

Our KPI for objective 2 is a measure of taxonomic diversity based on Santamours 10% rule that no urban forest should consist of more than 10%

of a single species, more than 20% of a single genus and more than 30% of one family. (Trees for Urban Planting: Diversity Uniformity and Common Sense).

Our KPI for objective 3 is a survey of community perspectives on engagement. We currently hold no data on this. Through the course of the delivery of the strategy we aim to have at least 60-70% positive feedback in results.

8.1 Performance Monitoring Levels

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Key Performance Indicator	Performance Level				Priority	Annual assessment
	Poor	Moderate	Good	Optimal		
1. Canopy Cover (%)	<13.5%	13.5- 16.5%	16.5- 18%	18%>	Medium	0.5% increase
2. Urban Forest Health Species, Genus, Family diversity (%)	> 20%/ 30% / 40%	> 10%/ 20%/ 30%	10%/ 20%/ 30%	<10%/ 20%/ 30%	High	Diversity improvement identified through diversity assessment
3. Community and Stakeholder Engagement Community survey (Positive feedback %)	0% (No data held)	50%- 60%	60%- 70%	70%>	High	Community engagement and perception survey designed by Forest Research and adapted for H&F

Table 1. Performance monitoring levels

9.0 Terms and Abbreviations

Terms

Term	Description
Canopy cover	A measure of the percent of an area that is covered by trees.
Capital Asset Valuation for Amenity Trees (CAVAT)	a method of assessment that produces a monetary value for individual trees based on their amenity value.
Climate and Ecology Strategy	Document outlining the Councils plans to address the Climate and Ecology Emergency.
Climate Adaption Strategy	Document in progress outlining the councils plan to adapt the effects of climate change.
Ecosystem services	The direct or indirect benefits that ecosystems offer humans.
Family	A principal taxonomic category that ranks above genus and below order.
Genus	A principle taxonomic category that ranks above the species and below family.
Species	A principle taxonomic category that ranks below family.
H&F Local Plan	The Council’s plan for the future development of the area. In law this is described as the development plan documents adopted under the Planning and Compulsory Purchase Act 2004. A local plan can consist of either strategic or non-strategic policies, or a combination of the two.
London Plan	A document outlining the Mayor of London’s plan for the future development of London.
Nature-based solutions	Actions to protect, sustainably manage, and restore natural and modified ecosystems that address societal challenges effectively and adaptively, simultaneously providing human wellbeing and biodiversity benefits.

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Term	Description
Pollard	Pollarding is the heavy pruning of a tree at a certain height above ground level, removing all the of the crown but sometimes leaving some framework branches, typically in species resilient to this way of management.
Sapling	A young tree implied to be self-sown, often referring to young trees smaller than a seedling.
Standard tree	A tree with a single stem with clear trunk at least 1.8m (6ft) is referred to as a Standard.
Taxonomic diversity	Variety of family, genus, and species of trees
Tiny forest	A dense, fast-growing native forest based on an established forest management method.
Tree Policy	Document outlining how the Council deliver routine management method.
Tree Strategy	Document outlining the Councils aims for their treescape and how they intend to achieve them.
Veteran or ancient tree	A tree which, because of its age, size and condition, is of exceptional biodiversity, cultural or heritage value. All ancient trees are veteran trees. Not all veteran trees are old enough to be ancient, but are old relative to other trees of the same species. Very few trees of any species reach the ancient life-stage.
Whip	Young tree for out-planting consisting of a centre leader with few or no side branches, perhaps 1.0m tall.

Abbreviations

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Abbreviation	Term	Description
EIP	Environmental Improvement Plan	The Environmental Improvement Plan (EIP) 2023 for England is the first revision of the 25 Year Environment Plan. It builds on the vision with a new plan setting out how the Government will work with landowners, communities, and businesses to deliver goals for improving the environment, matched with interim targets to measure progress.
NPPF	National Planning Policy Framework	The revised National Planning Policy Framework sets out government’s planning policies for England and how these are expected to be applied.
AQAP	Air Quality Action Plan	H&F’s plan that outlines urgent actions to improve air quality, protect local nature and help local people live healthier lives.
NCA	Natural Capital Account	A document published by the Mayor of London outlining the economic value of health benefits that Londoners get from the capital’s public parks and green spaces.
LNRS	Local Nature Recovery Strategy	Document in development by Natural England. It will identify, map and prioritise local actions to create bigger, better and more connected natural places that benefit people, wildlife and the economy.
BNG	Biodiversity Net Gain	A mandated process to increase the overall biodiversity value of a project or development.
GIS	Geographic Information System	A system for storing and manipulating geographical information on computer.
UGF	Urban Greening Factor	A planning tool to improve the provision of green Infrastructure, particularly in urban areas.
SPD	Supplementary Planning Document	Detailed advice or guidance in relation to policies in an adopted Local Plan.
TPO	Tree Preservation Order	A Tree Preservation Order is an order made by a local planning authority in England to protect specific trees, groups of trees or woodlands in the interests of amenity.

Objective	Sub category	Action			Priority Ranking	Cost (value in £)					Timing			Owner			Review	
		What?	How?	Where?		Investigation / Feasibility	Capital	Other	Benefit	Potential Funding Source	Timeframe	Start Date	Approx. Duration	Lead Dep't H&F	Primary Support	Other Stakeholders	Frequency	Next Review Date
Increasing canopy cover	Opportunity mapping	Undertake borough-wide opportunity mapping	Mapping planting opportunities by officers and compiled in GIS	Borough Wide	High	60,000	20,000		Planting projects ready to deliver when funding is available.	H&F	Medium	Jan-25	2 years	HIGHWAYS	PARKS		6 months	Jul-25
Increasing canopy cover	Opportunity mapping	Develop a borough wide trial tree pit programme	Investigation of planting opportunities for trees by excavating areas and land-use changes. Viable sites to be planted.	Borough Wide	Medium	5,000	100,000		Increase canopy cover, shading, aesthetic value on streets.	H&F, S106,	Medium	Sep-25	5 years	HIGHWAYS	ALL	Residents and businesses	Annually	Sep-26
Increasing canopy cover	Opportunity mapping	Implement an annual tree planting quota of at least 195 standard trees	Planting of 195 new trees per annum (based on 2.5% increase)	Borough Wide	High	20,000	480,000		Sustainable urban drainage, urban cooling, CO2 sequestration	H&F, external grants, S106	Medium	Apr-25	5years	HIGHWAYS	ALL	Residents and businesses	Annually	Apr-26
Increasing canopy cover	Funding	Tree donation programme	Create a borough wide tree donation website. Application are directed to the relevant departments handling the application with a finance system in place to manage donations.	Borough wide	Medium	5,000	10,000		Increases tree canopy cover	Residents and partners, H&F	Medium	Jan-26	5 years	PARKS	HIGHWAYS	Consult with Resident groups	6 months	Jul-26
Increasing canopy cover	Funding	Establish and external funding working group	Coordinate departments to maximise funding opportunities through successful external grant applications, bids and resourcing.	Across all departments involved in the tree strategy & finance	High	40,000			Increasing income to deliver more projects and free up capital resources, plus added benefits of developing partnership working	H&F to fund a fundraising officer (should end up paying for itself)	medium-long	Jul-25	permanent officer position, cost annual cost	CCU	ALL		Annually	Jul-26
Increasing canopy cover	Funding	Develop collaboration with local businesses through the Climate Alliance	Create opportunities for local businesses to support tree planting and greenspace projects.	Borough wide	Medium	20,000			Increasing income to deliver more projects and free up capital resources, plus added benefits of developing partnership working	H&F	medium-long	Apr-25	permanent officer position 0.4 FTE	CCU	ALL		Annually	Apr-26
Increasing canopy cover	Legacy planting	Plant one tiny forest per year	Parks team to look into potential future sites with climate change team	Borough Wide	Medium	10,000			Increase biodiversity & canopy cover	UTCf, LATf, Woodland Trust, Lottery Funding	Medium	Jul-25	6 years	PARKS	HOUSING AND CCU	Consult with resident groups/councillors	Annually	Jul-26
Increasing canopy cover	Legacy planting	Develop a whip management plan	Tree survey of new woodland areas, 10 yrs after TF maintenance. Mapping areas on Confirm to aid in management	Borough Wide	Medium	BAU			Improved mapping and asset knowledge	H&F	Medium	Apr-25	2 years	PARKS	HIGHWAYS		Annually	Jan-26
Increasing canopy cover	Legacy planting	Plant 100 whips per year to create new green corridors and hedgerows (in addition to tiny forests)	Officers in all departments to apply for funding and monitor works, support from parks	Borough wide	Medium	BAU	10,000		Increases tree canopy cover and species diversity	Forestry Comission, UTCf/LF/WT, LATf, H&F	Medium	Nov-25	5 years	PARKS	HOUSING	Resident groups/Councillors	Annually	Nov-26
Increasing canopy cover	Private land	Develop working relationships with private landowners	Encourage planting and collaboration on land owned and maintained by Transport for London (TfL) and Network Rail (NR) etc.	Borough wide	Low / medium	BAU			Increases tree canopy cover and species diversity		Long	Nov-25	5 years	HIGHWAYS	PARKS	TfL, Network Rail, Housing providers		Nov-26

APPENDIX 2

Increasing canopy cover	Private land	Annual tree/whip giveaway	Source saplings (from Wormwood Scrubs, Woodland Trust, Nursery stock etc.) and organise giveaway events annually	Borough wide	Low / medium	5,000	1,000		Engagement with residents and ability to directly influence an increase in tree planting in private spaces - whips more likely to survive due to high level of care provided	Climate change drawdown fund or free tree sources	Long	Sep-25	5 years	CCU	PARKS	Local businesses and partner organisation who might supply free trees	Annually	Apr-26
Increasing canopy cover	Private land	Collect data and map borough wide ecosystems services (e.g I-Tree Eco)	Gnetian survey data supplemented by H&F data	Borough Wide	High	5000	2,000		Greater understanding of current tree stock to map potential for further planting	H&F	Short	Sep-25	1 year	HIGHWAYS	CCU		Annually	Sep-26
Preserving and improving tree stock	Increasing biodiversity	Develop a replacement tree standard	Gather evidence on current tree planting practices and use to inform policy	Borough Wide	High	10,000			Well evidenced reasoning for planting programme to understand benefits of planting particular species in particular locations	H&F	Long	Apr-25	2 years	HIGHWAYS	ALL		Annually	Mar-26
Preserving and improving tree stock	Increasing biodiversity	Develop mapping for biosecurity and monitor annually	Update tree inspection programme to include identification of biosecurity concerns. Create heat maps of biosecurity concerns over time	Borough Wide	High		15,000		Early identification of concerns that could affect tree stock.	H&F	Long	Apr-25	5 years	HIGHWAYS	ALL		Annually	Mar-26
Preserving and improving tree stock	Increasing biodiversity	Develop tool to inform species selection of all trees to be planted, ensuring that native or nativar species are considered.	Develop a planting matrix that ensures species selection is justified at all locations, even replacement trees. This will ensure that where appropriate native and nativars are selected.	Borough Wide	High	BAU	BAU		Increase the amount of native trees and improve local biodiversity	H&F	Long	Sep-25	1 year	HIGHWAYS	CCU and PARKS		Annually after each planting cycle	Apr-25
Preserving and improving tree stock	Development opportunities	Develop trees in planning procedures	Internal procedure for reviewing S211 notices, TPO applications	Borough wide	High	BAU			Ensures that notices are dealt with and that proposed works are assessed to minimise tree damage and loss	H&F	Short	Sep-24	1 year	PLANNING	HIGHWAYS	Parks and Housing	Annual	Sep-26
Preserving and improving tree stock	Development opportunities	Develop on-going maintenance plans and use planning tools to improve green infrastructure on developments.	Through the planning process and policy	Borough wide	Medium	BAU			Ensures that new development benefits the local environment in the long term.	H&F	Medium	Jan-25	2 years	PLANNING	ALL		Annual	Jan-26
Preserving and improving tree stock	Development opportunities	Improve and define pre-application guidance for arboriculture	Encourage developers to seek pre-application arboricultural advice. Update webpages to advise developers on local policy and guidance on arboricultural assessments and requirements that must be considered	Borough wide	Medium	BAU			Ensuring that new new developments aim to achieve maximum canopy cover and that existing trees are protected.	H&F	Medium	Jan-25	2 years	PLANNING	ALL		Annually	Jan-26
Preserving and improving tree stock	Developing policy	Check and revise all internal policies	Ensure all policy is adhering to new legislation and guidance	Borough Wide	High	BAU			Ensures that LBHF are compliant with good practice and legislation	H&F	Long	Sep-25	5 years	HIGHWAYS	ALL		Annually	Sep-26

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Preserving and improving tree stock	Developing policy	Produce a waste management strategy for tree waste	Internally develop and deliver a waste strategy for parks, housing & highways tree waste, in collaboration with the tree contractor.	Borough wide	Low	BAU			Increase sustainability and reducing our carbon footprint.	H&F	Medium	Jan-25	1 year	PARKS	HIGHWAYS	Resident groups/Councilors	Annually	Jan-26
Preserving and improving tree stock	Developing policy	Produce a Veteran Tree Policy	Research and map all veteran trees in the borough. Use veteran tree forum for support & guidance.	Borough wide	Low	BAU			Maintain cultural, historical and nature conservation value	H&F	Long	Jan-25	2 years	PARKS	ALL	Planning department/Local resident groups	Annually	Jan-26
Preserving and improving tree stock	Developing policy	Replacement tree inspection policy	Develop process to inspect replacement trees ensuring improved establishment and survival rates	Borough wide	Low	BAU			Increase efficiency	H&F	Long	Jan-25	1 year	HIGHWAYS	ALL		2yrs	Jan-27
Preserving and improving tree stock	Training and development	Quarterly training meeting with Arboricultural Teams and Strategy Focus Group	Officers involved in arboriculture and green infrastructure across the council to meet quarterly to discuss practices and innovation.		Medium	BAU			Share knowledge and skills. Ensure that best practices are being followed	H&F	Long	Sep-25	5 years	HIGHWAYS	ALL		Annually	Sep-26
Preserving and improving tree stock	Training and development	Training programme for wider officers	Undertake basic arboriculture training for highway inspectors, parks officers and housing officers.		Medium	1,000	10,000		Increase wider knowledge of H&S aspects of trees	H&F	Medium	Apr-25	3 years	HIGHWAYS	ALL		Annually	Mar-26
Preserving and improving tree stock	Training and development	Training for contractors	Undertake basic arboriculture training for highway, parks, and housing contractors who work around trees.		Medium	1,000	10,000		Increase wider knowledge of H&S aspects of trees and ensure that best practices are used when working around trees	H&F	Medium	May-25	3 years	HIGHWAYS	PARKS	Contractors	Annually	May-26
Working with residents and partners	Improving communications	Update website, FAQ section, annual reporting	Review and update webpages ensuring that all information is clear and consistent. Submit annual tree statistics on the website. Write quarterly articles in Climate Connects on tree management		High	BAU			Improve the access to tree resources for residents	H&F	Short	Sep-25	1 year	HIGHWAYS	ALL	Communication team	Annually	Sep-26
Working with residents and partners	Improving communications	Annual resident survey on tree service	Compile and publish a survey for residents. Survey to focus on the service quality, resident involvement, and requests.	Borough wide	Medium	10,000			Highlight areas for service improvements and future projects	H&F	Long	Apr-25	5 years	HIGHWAYS	ALL	Communication team	Annually	Apr-26
Working with residents and partners	Improving communications	Guidance for private landowners	Update website for information private tree management. To include information on maintenance, emergencies, approved suppliers and trees in conservation areas.	Borough wide	High	BAU			Improve support for private tree management	H&F	Medium	Apr-25	3 years	HIGHWAYS	PLANNING	CCU, Communication	Annually	Apr-26
Working with residents and partners	Improving communications	Improve online GIS mapping on statutory protections	Map in GIS all TPOs and publish on the LBHF website, and establish a procedure for updating this.	Borough wide	Medium	5,000	10,000		Improve the access to TPO data and management of this information	H&F	Medium	Jul-25	2 years	PLANNING	HIGHWAYS		Annually	Jul-26

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Working with residents and partners	Education	Promote forest schools	Develop internally a booking facility on the H&F website to streamline the process of bookings for schools and groups.	Borough wide	Low	BAU	10,000		Raise awareness of the importance of woodland conservation, better management and understanding of the use of forest schools	H&F	Long	Dec-25	2 years	PARKS	CCU		Annually	Dec-26
Working with residents and partners	Education	Develop curated maps promoting heritage and culturally valuable and significant trees	Public access to a map of tree species data via resident eGIS access and design walking routes that pick up key species and trees	Borough wide	Low	15,000	10,000		Education in relation to tree species and identification of trees and increasing access to information, improving health and wellbeing	H&F	Long	Jan-26	2 years	PARKS	CCU		Annually	Dec-27
Working with residents and partners	Education	Online information packs, events and resources.	Develop officer led tree sessions with climate change team across park & housing sites.	Borough wide	Low	BAU			Increased community engagement & resident wellbeing	H&F	Long	Jan-25	1 year	PARKS	CCU	Community groups	2yrs	Jan-26
Working with residents and partners	Community Projects	Tree watering project	Work with comms to develop an engagement plan to encourage residents and those in the borough to identify vulnerable trees and protect them during droughts.	Borough Wide	High	10,000	2,000		Engagement with residents and increased survival rate for vulnerable trees	H&F	Long	Sep-25	5 years	HIGHWAYS	ALL	Contractors, friends groups, schools & community organisations	Annually	Sep-26
Working with residents and partners	Community Projects	Establish Tree champion/warden project	Develop an engagement plan to encourage residents and those in the borough to identify vulnerable trees and protect them during droughts	Borough Wide	High	10,000	2,000		Engagement with residents and increased survival rate for vulnerable trees	H&F	Long	Jan-25	5 years	HIGHWAYS	CCU	Council contractors, Friends groups, schools & community organisations	Annually	Jan-26
Working with residents and partners	Community Projects	TRA project design sessions	Facilitate design of community tree projects and allocate a resource for this	H&F Housing Estates	High	5,000	30,000	30,000	Increased community engagement & resident wellbeing, increased canopy cover	UCTF, LATF	Medium	Sep-25	3 years	HOUSING	CCU	TRAs	6 months	Feb-26
Working with residents and partners	Community Projects	Support independent community groups (e.g. Friends of groups)	Planting projects	Borough wide	Low	BAU	20,000		Increased community engagement & resident wellbeing	Internal, UCTF, LATF	Long	Jan-25	1 year	PARKS		Community groups	1yr	Jan-26
Working with residents and partners	Community Engagement	Annual meeting and engagement	Organise a collective panel of members to discuss scheduled tree works and ongoing tree planting. Upcoming or proposed project per group.	Borough wide	Low	BAU	2,000		Increased community engagement & resident wellbeing	H&F	Long	Jan-25	5 years	PARKS	CCU	Community groups	Annually	Jan-26
Working with residents and partners	Community engagement	Urban ecology walks	Organise two urban ecology walks in the borough with residents	Borough wide	Low	5,000	3,000		Increased community engagement & resident wellbeing	H&F	Long	Jan-25	5 years	CCU	Highways/Parks	Community groups	Annually	Jan-26
Working with residents and partners	Community Engagement	Annual Survey	Annual survey collecting data on social perceptions to inform our community engagement KPI	Borough wide	Medium	1,000	1,000		Increased community engagement & resident wellbeing	H&F	Long	Sep-25	5 years	HIGHWAYS	PARKS	Community groups	Annually	Sep-26
Working with residents and partners	Community Engagement	Citizen led surveys	We want to include residents in our next I-Tree Eco study and offer other opportunities to get involved in researching our urban forest.	Borough wide	Low	5,000	1,000		Increased community engagement & resident wellbeing	H&F	Long	Jan-25	5 years	HIGHWAYS	PARKS	Community groups	5 years	Jan-30

Appendix 3 - H&F Equality Impact Analysis Tool

Conducting an Equality Impact Analysis

An EIA is an improvement process which helps to determine whether our policies, practices, or new proposals will impact on, or affect different groups or communities. It enables officers to assess whether the impacts are positive, negative, or unlikely to have a significant impact on each of the protected characteristic groups.

The tool is informed by the [public sector equality duty](#) which came into force in April 2011. The duty highlights three areas in which public bodies must show compliance. It states that a public authority must, in the exercise of its functions, have due regard to the need to:

- 1. Eliminate discrimination, harassment, victimisation, and any other conduct that is prohibited under the Equality Act 2010**
- 2. Advance equality of opportunity between persons who share a relevant protected characteristic and persons who do not share it**
- 3. Foster good relations between persons who share a relevant protected characteristic and persons who do not share it**

Whilst working on your Equality Impact Assessment, you must analyse your proposal against these three tenets.

General points

1. In the case of matters such as service closures or reductions, considerable thought will need to be given to any potential equality impacts. Case law has established that due regard cannot be demonstrated after the decision has been taken. Your EIA should be considered at the outset and throughout the development of your proposal, it should demonstrably inform the decision, and be made available when the decision is recommended.
2. Wherever appropriate, the outcome of the EIA should be summarised in the Cabinet/Cabinet Member report and equalities issues dealt with and cross referenced as appropriate within the report.
3. Equalities duties are fertile ground for litigation and a failure to deal with them properly can result in considerable delay, expense, and reputational damage.
4. Where dealing with obvious equalities issues e.g. changing services to disabled people/children, take care not to lose sight of other less obvious issues for other protected groups.
5. If you already know that your decision is likely to be of high relevance to equality and/or be of high public interest, you should contact the Strategy & Communities team for support.

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Further advice and guidance can be accessed online and on the intranet:

<https://www.gov.uk/government/publications/public-sector-equality-duty>

<https://officesharedservice.sharepoint.com/sites/Governance/SitePages/Reports.aspx>

H&F Equality Impact Analysis Tool

Overall Information	Details of Full Equality Impact Analysis
Financial Year and Quarter	2024/25 / Q3
Name and details of policy, strategy, function, project, activity, or programme	Title of EIA: Tree Strategy. New strategy 2025-2030 Short summary: Tree strategy for the borough, aiming to increase canopy cover, protect trees and work closer with stakeholders in all tree works.
Lead Officer	Name: Jessica Bastock Position: Service Manager (healthy streets) Email: Telephone No:
Date of completion of final EIA	25 / 11 / 24

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Section 02	Scoping of Full EIA		
Plan for completion	Timing: Resources:		
Analyse the impact of the policy, strategy, function, project, activity, or programme	Analyse the impact of the policy on the protected characteristics (including where people / groups may appear in more than one protected characteristic). You should use this to determine whether the policy will have a positive, neutral, or negative impact on equality, giving due regard to relevance and proportionality.		
	Protected characteristic	Analysis	Impact: Positive, Negative, Neutral
	Age	Increased tree canopy cover can improve air quality and provide cooling effects, which are particularly beneficial for vulnerable groups such as the elderly (age), children (age).	P
	Disability	Increased tree canopy cover can improve air quality and provide cooling effects, which are particularly beneficial for vulnerable groups such as those with respiratory conditions	P

	(disability). Care must be taken to ensure that new green spaces are accessible to Disabled people, including considerations for pathways and seating.	
Gender reassignment	The tree strategy does not include any actions that would be deemed as negative or positive in relation to gender reassignment.	Neutral
Marriage and Civil Partnership	The tree strategy does not include any actions that would be deemed as negative or positive in relation marriage and civil partnership.	Neutral
Pregnancy and maternity	The tree strategy does not include any actions that would be deemed as negative or positive in relation to pregnancy and maternity.	Neutral
Race	The tree strategy does not include any actions that would be deemed as negative or positive in relation to race.	Neutral
Religion/belief (including non-belief)	The tree strategy does not include any actions that would be deemed as negative or positive in relation to religion or beliefs.	Neutral
Sex	The tree strategy does not include any actions that would be deemed as negative or positive in relation to sex.	Neutral
Sexual Orientation	The tree strategy does not include any actions that would be deemed as negative or positive in relation to sexual orientation.	Neutral
Care Experienced as a Protected Characteristic	The tree strategy does not include any actions that would be deemed as negative or positive in relation care experienced as a protected characteristic.	Neutral

Human Rights or Children's Rights

If your decision has the potential to affect Human Rights or Children's Rights, please contact your Equality Lead for advice

Will it affect Human Rights, as defined by the Human Rights Act 1998?

No

Will it affect Children's Rights, as defined by the UNCRC (1992)?

	No
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Section 03	Analysis of relevant data Examples of data can range from census data to customer satisfaction surveys. Data should involve specialist data and information and where possible, be disaggregated by different equality strands.
Documents and data reviewed	N/A
New research	

Section 04	Consultation
Consultation	N/A
Analysis of consultation outcomes	

Section 05	Analysis of impact and outcomes
Analysis	N/A

Section 06	Reducing any adverse impacts and recommendations
Outcome of Analysis	Conduct regular audits of green spaces to ensure they are accessible to all, including Disabled people

Section 07	Action Plan
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Action Plan	Note: You will only need to use this section if you have identified actions as a result of your analysis					
	Issue identified	Action (s) to be taken	When	Lead officer and department	Expected outcome	Date added to business/service plan
	Accessibility	Ensure audits are undertaken to ensure that these are know and mitigation is taken where needed.	Annually (as part of planned maintenance surveying).	Jessica Bastock (Place – Highways)	Identification of accessibility issues.	November 2024

Section 08	Agreement, publication and monitoring
Senior Managers' sign-off	Name: Ian Hawthorn Position: Assistant Director (Highways) Email: ian.hawthorn@lbhf.gov.uk Telephone No: Considered at relevant DMT:
Key Decision Report (if relevant)	Date of report to Cabinet/Cabinet Member: 16 / 12 / 24 Key equalities issues have been included: Yes/No
Equalities Advice (where involved)	Name: Position: Date advice / guidance given: Email: Telephone No:

NOTICE OF CONSIDERATION OF A KEY DECISION

In accordance with paragraph 9 of the Local Authorities (Executive Arrangements) (Meetings and Access to Information) (England) Regulations 2012, the Authority hereby gives notice of Key Decisions which the Cabinet, Cabinet Members or Chief Officers intend to consider. The list may change from the date of publication as further items may be entered.

NOTICE OF THE INTENTION TO CONDUCT BUSINESS IN PRIVATE

The Authority also hereby gives notice in accordance with paragraph 5 of the above Regulations that it may meet in private to consider Key Decisions going to a Cabinet meeting which may contain confidential or exempt information.

Reports relating to Cabinet key decisions which may be considered in private are indicated in the list of Cabinet Key Decisions below, with the reasons for the decision being made in private. Any person is able to make representations to the Cabinet if he/she believes the Cabinet decision should instead be made in the public at the Cabinet meeting. If you want to make such representations, please e-mail Katia Neale on katia.neale@lbhf.gov.uk. You will then be sent a response in reply to your representations. Both your representations and the Executive's response will be published on the Council's website at least 5 working days before the Cabinet meeting.

KEY DECISIONS PROPOSED TO BE MADE BY THE AUTHORITY FROM JANUARY UNTIL JUNE 2025

The following is a list of Key Decisions which the Authority proposes to take from January 2025. The list may change over the next few weeks.

KEY DECISIONS are those which are likely to result in one or more of the following:

- Any expenditure or savings which are significant (ie. in excess of £300,000) in relation to the Council's budget for the service function to which the decision relates;
- Anything affecting communities living or working in an area comprising two or more wards in the borough;
- Anything affecting the budget and policy framework set by the Council.

The Key Decisions List will be updated and published on the Council's website at least on a monthly basis.

NB: Key Decisions will generally be taken by the Executive at the Cabinet, by a Cabinet Member or by a Chief Officer.

*If you have any queries on this Key Decisions List, please contact
Katia Neale on 07776 672 956 or by e-mail to katia.neale@lbhf.gov.uk*

Access to Key Decision reports and other relevant documents

Key Decision reports and documents relevant to matters to be considered at the Authority by Cabinet only, will be available on the Council's website (www.lbhf.org.uk) a minimum of 5 working days before the Cabinet meeting. Further information, and other relevant documents as they become available, can be obtained from the contact officer shown in column 4 of the list below.

Decisions

All Key Decisions will be subject to a 3-day call-in before they can be implemented, unless called in by Councillors.

Making your Views Heard

You can comment on any of the items in this list by contacting the officer shown in column 4. You can also submit a deputation to the Cabinet related to Cabinet Key Decisions only. Full details of how to do this (and the date by which a deputation must be submitted) will be shown in the Cabinet agenda.

LONDON BOROUGH OF HAMMERSMITH & FULHAM CABINET

Leader of H&F	Councillor Stephen Cowan
Deputy Leader (with responsibility for Children and Education)	Councillor Alexandra Sanderson
Cabinet Member for Adult Social Care and Health	Councillor Bora Kwon
Cabinet Member for Social Inclusion and Community Safety	Councillor Rebecca Harvey
Cabinet Member for the Economy	Councillor Andrew Jones
Cabinet Member for Housing and Homelessness	Councillor Frances Umeh
Cabinet Member for Finance and Reform	Councillor Rowan Ree
Cabinet Member for Climate Change and Ecology	Councillor Wesley Harcourt
Cabinet Member for Public Realm	Councillor Sharon Holder
Cabinet Member for Enterprise and Skills	Councillor Zarar Qayyum

Key Decisions List No. 143 (published 3 January 2024)

KEY DECISIONS LIST – FROM JANUARY 2025

The list also includes decisions proposed to be made by future Cabinet meetings

Where column 3 shows a report as EXEMPT, the report for this proposed decision will be considered at the private Cabinet meeting. Anybody may make representations to the Cabinet to the effect that the report should be considered at the open Cabinet meeting (see above).

* All these decisions may be called in by Councillors; If a decision is called in, it will not be capable of implementation until a final decision is made.

Decision to be made by	Type of decision	Proposed Key Decision Most decisions are made in public unless indicated below, with the reasons for the decision being made in private.	Lead Executive Councillor(s), Wards Affected, and officer to contact for further information or relevant documents	Documents publication
CABINET MEMBER AND OFFICER DECISIONS				
Finance				
Deputy Leader (with responsibility for Children and Education)	Expenditure/ Income above £300K - Revenue up to £500k and Capital up to 1.5m	Short Term Lease for the School House at Hurlingham Academy The report requests approval for consent for Hurlingham Academy to enter into a short term lease of the School House (caretakers lodge).	Deputy Leader (with responsibility for Children and Education)	A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.
			Ward(s): Palace & Hurlingham	
			Contact officer: Daryle Mathurin Tel: 07816 661199 Daryle.Mathurin@lbhf.gov.uk	
Deputy Leader (with responsibility for Children and Education)	Expenditure/ Income - Revenue between £500,000 and £5m and Capital between £1.5m and £5m	Breakfast Support Provider to Address Food Poverty in Schools Deliver of expert advice and support to establish hunger focused breakfast provision in schools as well as food deliveries.	Deputy Leader (with responsibility for Children and Education)	A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet Member Decisions and Officer Decisions reports will be published at the start of the
			Ward(s): All Wards	
			Contact officer: Marcus Robinson Marcus.RobinsonCHS@lbhf.gov.uk	

Decision to be Made by (Cabinet or Council)	Type of decision	Proposed Key Decision Most decisions are made in public unless indicated below, with the reasons for the decision being made in private.	Lead Executive Councillor(s), Wards Affected, and officer to contact for further information or relevant documents	Documents to be submitted to Cabinet (other relevant documents may be submitted)
				3-day call-in.
Executive Director of Place	Expenditure/ Income above £300K - Revenue up to £500k and Capital up to 1.5m	<p>Refurbished Town Hall - Level 06 Fit-Out</p> <p>The Council is seeking to tender for works to fit-out the new bar and restaurant area on Level 06 of the refurbished Town Hall. Works are likely to include, floor and wall finishes, lighting, kitchen and bar counter.</p>	<p>Cabinet Member for the Economy</p> <hr/> <p>Ward(s): Hammersmith Broadway</p> <hr/> <p>Contact officer: Philippa Cartwright Philippa.Cartwright@lbhf.gov.uk</p>	A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.
Deputy Leader (with responsibility for Children and Education)	Expenditure/ Income - Revenue between £500,000 and £5m and Capital between £1.5m and £5m	<p>GLA funding for Primary School Universal Free School Meals</p> <p>The Mayor for London announced £130 million of one-off funding to ensure all school children at publicly funded primary schools in London can receive free school meals for the academic year beginning in September 2023.</p> <p>The funding allocation for Hammersmith & Fulham is funding for schools to implement the meal provision for children in Key Stage 2 who are not otherwise eligible for free school meals.</p>	<p>Deputy Leader (with responsibility for Children and Education)</p> <hr/> <p>Ward(s): All Wards</p> <hr/> <p>Contact officer: Marcus Robinson Marcus.RobinsonCHS@lbhf.gov.uk</p>	A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.
Cabinet Member for the Economy	Affects 2 or more wards	<p>Article 4 Direction</p> <p>Direction to remove permitted development rights for commercial premises to change use to residential in identified commercial</p>	<p>Cabinet Member for the Economy</p> <hr/> <p>Ward(s): All Wards</p>	A detailed report for all decisions going to Cabinet will be available at

Decision to be Made by (Cabinet or Council)	Type of decision	Proposed Key Decision Most decisions are made in public unless indicated below, with the reasons for the decision being made in private.	Lead Executive Councillor(s), Wards Affected, and officer to contact for further information or relevant documents	Documents to be submitted to Cabinet (other relevant documents may be submitted)
		areas within the borough.	Contact officer: David Gawthorpe David.Gawthorpe@lbhf.gov.uk	least five working days before the date of the meeting. Cabinet Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.
Cabinet Member for Finance and Reform	Expenditure/ Income above £300K - Revenue up to £500k and Capital up to 1.5m	Smart Building and Environmental Technologies 2023 The council has ambitions to invest in technology to support climate and environmental targets within offices. Facilities are needed to monitor and manage energy and power usage and operate technically efficient buildings whilst providing powerful utilization data.	Cabinet Member for Finance and Reform Ward(s): All Wards Contact officer: Ramanand Ladva Tel: 07493864847 Ramanand.Ladva@lbhf.gov.uk	A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.
Executive Director of Finance and Corporate Services	Expenditure/ Income above £300K - Revenue up to £500k and Capital up to 1.5m	Council Tax Single Person Discount Review In line with recommendations from DLUHC, the Council conducts a yearly review of the Single Persons Discount (SPD) which has been granted to residents previously under Section.11 Council Tax (Discount and Disregard) LGFA 1993. This review is to establish whether the resident is still eligible for the discount, which is a 25% reduction on the council tax charge.	Cabinet Member for Finance and Reform Ward(s): All Wards Contact officer: Jamie Mullins Tel: 020 8753 1650 Jamie.Mullins@lbhf.gov.uk	A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet Member Decisions and Officer Decisions reports will be published at

Decision to be Made by (Cabinet or Council)	Type of decision	Proposed Key Decision Most decisions are made in public unless indicated below, with the reasons for the decision being made in private.	Lead Executive Councillor(s), Wards Affected, and officer to contact for further information or relevant documents	Documents to be submitted to Cabinet (other relevant documents may be submitted)
				the start of the 3-day call-in.
Cabinet Member for the Economy	Expenditure/ Income - Revenue between £500,000 and £5m and Capital between £1.5m and £5m	<p>Instruction to H&F Developments Ltd to grant a lease on civic campus Block B Restaurant</p> <p>The Council's nominee company, H&F Housing Developments Ltd acts on the instruction of the Council in all matters related to the commercial leases on the civic campus</p>	<p>Cabinet Member for the Economy</p> <hr/> <p>Ward(s): Hammersmith Broadway</p> <hr/> <p>Contact officer: Philippa Cartwright</p> <p>Philippa.Cartwright@lbhf.gov.uk</p>	A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.
Executive Director of Place	Expenditure/ Income over £5m & policies or new income, reserves use, overspend over £300K	<p>Instruction to H&F Developments Ltd to grant cinema lease to successful operator</p> <p>The Council's nominee company, H&F Housing Developments Ltd, acts upon the instruction of the council in matters relating to commercial leases at the Civic Campus.</p> <p>PART OPEN PART PRIVATE Part of this report is exempt from disclosure on the grounds that it contains information relating to the financial or business affairs of a particular person (including the authority holding that information) under paragraph 3 of Schedule 12A of the Local Government Act 1972, and in all the circumstances of the case, the public interest in maintaining the exemption outweighs the public interest in disclosing the information.</p>	<p>Cabinet Member for the Economy</p> <hr/> <p>Ward(s): Hammersmith Broadway</p> <hr/> <p>Contact officer: Philippa Cartwright</p> <p>Philippa.Cartwright@lbhf.gov.uk</p>	A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.

Decision to be Made by (Cabinet or Council)	Type of decision	Proposed Key Decision Most decisions are made in public unless indicated below, with the reasons for the decision being made in private.	Lead Executive Councillor(s), Wards Affected, and officer to contact for further information or relevant documents	Documents to be submitted to Cabinet (other relevant documents may be submitted)
Executive Director of Place	Expenditure/ Income above £300K - Revenue up to £500k and Capital up to 1.5m	<p>Instruction to H&F Developments Ltd to grant a lease on civic campus Block C cafe</p> <p>The Council's nominee company, H&F Housing Developments Ltd acts on the instruction of the Council in all matters related to the commercial leases on the civic campus</p>	<p>Cabinet Member for the Economy</p> <hr/> <p>Ward(s): Hammersmith Broadway</p> <hr/> <p>Contact officer: Philippa Cartwright Philippa.Cartwright@lbhf.gov.uk</p>	A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.
Executive Director of Place	Expenditure/ Income above £300K - Revenue up to £500k and Capital up to 1.5m	<p>Instruction to H&F Developments Ltd to grant lease on civic campus Block C retail unit</p> <p>The Council's nominee company, H&F Housing Developments Ltd acts on the instruction of the Council in all matters related to the commercial leases on the civic campus</p>	<p>Cabinet Member for the Economy</p> <hr/> <p>Ward(s): Hammersmith Broadway</p> <hr/> <p>Contact officer: Philippa Cartwright Philippa.Cartwright@lbhf.gov.uk</p>	A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.
Executive Director of Place	Expenditure/ Income over £5m & policies or new income, reserves use, overspend over £300K	<p>Instruction to H&F Developments Ltd to grant lease on civic campus convenience store to successful operator</p> <p>The Council's nominee company, H&F Housing Developments Ltd acts on the instruction of the Council in all matters related to the commercial leases on the civic campus.</p>	<p>Cabinet Member for the Economy</p> <hr/> <p>Ward(s): Hammersmith Broadway</p> <hr/> <p>Contact officer: Philippa Cartwright Philippa.Cartwright@lbhf.gov.uk</p>	A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet

Decision to be Made by (Cabinet or Council)	Type of decision	Proposed Key Decision Most decisions are made in public unless indicated below, with the reasons for the decision being made in private.	Lead Executive Councillor(s), Wards Affected, and officer to contact for further information or relevant documents	Documents to be submitted to Cabinet (other relevant documents may be submitted)
		<p>PART OPEN PART PRIVATE</p> <p>Part of this report is exempt from disclosure on the grounds that it contains information relating to the financial or business affairs of a particular person (including the authority holding that information) under paragraph 3 of Schedule 12A of the Local Government Act 1972, and in all the circumstances of the case, the public interest in maintaining the exemption outweighs the public interest in disclosing the information.</p>		<p>Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.</p>
Executive Director of Place	Expenditure/Income over £5m & policies or new income, reserves use, overspend over £300K	<p>Instruction to H&F Developments Ltd to grant lease on civic campus Block B 1st floor office</p> <p>The Council's nominee company, H&F Housing Developments Ltd acts on the instruction of the Council in all matters related to the commercial leases on the civic campus.</p>	<p>Cabinet Member for the Economy</p> <hr/> <p>Ward(s): Hammersmith Broadway</p> <hr/> <p>Contact officer: Philippa Cartwright Philippa.Cartwright@lbhf.gov.uk</p>	<p>A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.</p>
Executive Director of Place	Expenditure/Income over £5m & policies or new income, reserves use, overspend over £300K	<p>Instruction to H&F Developments Ltd to grant lease on civic campus Block B 2nd floor office</p> <p>The Council's nominee company, H&F Housing Developments Ltd acts on the instruction of the Council in all matters related to the commercial leases on the civic campus.</p>	<p>Cabinet Member for the Economy</p> <hr/> <p>Ward(s): Hammersmith Broadway</p> <hr/> <p>Contact officer: Philippa Cartwright Philippa.Cartwright@lbhf.gov.uk</p>	<p>A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet Member Decisions and Officer</p>

Decision to be Made by (Cabinet or Council)	Type of decision	Proposed Key Decision Most decisions are made in public unless indicated below, with the reasons for the decision being made in private.	Lead Executive Councillor(s), Wards Affected, and officer to contact for further information or relevant documents	Documents to be submitted to Cabinet (<i>other relevant documents may be submitted</i>)
				Decisions reports will be published at the start of the 3-day call-in.
Executive Director of Place	Expenditure/Income over £5m & policies or new income, reserves use, overspend over £300K	<p>Instruction to H&F Developments Ltd to grant lease on civic campus Block B 3rd floor office</p> <p>The Council's nominee company, H&F Housing Developments Ltd acts on the instruction of the Council in all matters related to the commercial leases on the civic campus.</p>	<p>Cabinet Member for the Economy</p> <hr/> <p>Ward(s): Hammersmith Broadway</p> <hr/> <p>Contact officer: Philippa Cartwright Philippa.Cartwright@lbhf.gov.uk</p>	A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.
Executive Director of Place	Expenditure/Income over £5m & policies or new income, reserves use, overspend over £300K	<p>Instruction to H&F Developments Ltd to grant lease on civic campus Block B 4th floor office</p> <p>The Council's nominee company, H&F Housing Developments Ltd acts on the instruction of the Council in all matters related to the commercial leases on the civic campus.</p>	<p>Cabinet Member for the Economy</p> <hr/> <p>Ward(s): Hammersmith Broadway</p> <hr/> <p>Contact officer: Philippa Cartwright Philippa.Cartwright@lbhf.gov.uk</p>	A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.

Decision to be Made by (Cabinet or Council)	Type of decision	Proposed Key Decision Most decisions are made in public unless indicated below, with the reasons for the decision being made in private.	Lead Executive Councillor(s), Wards Affected, and officer to contact for further information or relevant documents	Documents to be submitted to Cabinet (other relevant documents may be submitted)
Executive Director of Place	Expenditure/Income over £5m & policies or new income, reserves use, overspend over £300K	<p>Instruction to H&F Developments Ltd to grant lease on civic campus Block B 5th floor office</p> <p>The Council's nominee company, H&F Housing Developments Ltd acts on the instruction of the Council in all matters related to the commercial leases on the civic campus.</p>	<p>Cabinet Member for the Economy</p> <hr/> <p>Ward(s): Hammersmith Broadway</p> <hr/> <p>Contact officer: Philippa Cartwright Philippa.Cartwright@lbhf.gov.uk</p>	<p>A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.</p>
Executive Director of Place	Expenditure/Income over £5m & policies or new income, reserves use, overspend over £300K	<p>Instruction to H&F Developments Ltd to grant lease on civic campus Block B 6th floor office</p> <p>The Council's nominee company, H&F Housing Developments Ltd acts on the instruction of the Council in all matters related to the commercial leases on the civic campus.</p>	<p>Cabinet Member for the Economy</p> <hr/> <p>Ward(s): Hammersmith Broadway</p> <hr/> <p>Contact officer: Philippa Cartwright Philippa.Cartwright@lbhf.gov.uk</p>	<p>A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.</p>
Cabinet Member for the Economy	Expenditure/Income - Revenue between £500,000 and £5m and Capital between £1.5m and £5m	<p>Instruction to H&F Developments Ltd to grant a lease on civic campus Block B 7th floor office</p> <p>The Council's nominee company, H&F Housing Developments Ltd acts on the instruction of the Council in all matters related to the commercial leases on the civic campus.</p>	<p>Cabinet Member for the Economy</p> <hr/> <p>Ward(s): Hammersmith Broadway</p> <hr/> <p>Contact officer: Philippa Cartwright Philippa.Cartwright@lbhf.gov.uk</p>	<p>A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet</p>

Decision to be Made by (Cabinet or Council)	Type of decision	Proposed Key Decision Most decisions are made in public unless indicated below, with the reasons for the decision being made in private.	Lead Executive Councillor(s), Wards Affected, and officer to contact for further information or relevant documents	Documents to be submitted to Cabinet (other relevant documents may be submitted)
				Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.
Cabinet Member for the Economy	Expenditure/ Income above £300K - Revenue up to £500k and Capital up to 1.5m	<p>Instruction to H&F Developments Ltd to grant lease on civic campus Block B ground floor office / reception</p> <p>The Council's nominee company, H&F Housing Developments Ltd acts on the instruction of the Council in all matters related to the commercial leases on the civic campus</p>	<p>Cabinet Member for the Economy</p> <hr/> <p>Ward(s): Hammersmith Broadway</p> <hr/> <p>Contact officer: Philippa Cartwright Philippa.Cartwright@lbhf.gov.uk</p>	A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.
Cabinet Member for the Economy	Expenditure/ Income - Revenue between £500,000 and £5m and Capital between £1.5m and £5m	<p>Instruction to H&F Developments Ltd to grant a lease on civic campus Affordable Start-up Unit 2</p> <p>The Council's nominee company, H&F Housing Developments Ltd acts on the instruction of the Council in all matters related to the commercial leases on the civic campus</p>	<p>Cabinet Member for the Economy</p> <hr/> <p>Ward(s): Hammersmith Broadway</p> <hr/> <p>Contact officer: Philippa Cartwright Philippa.Cartwright@lbhf.gov.uk</p>	A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.

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Cabinet Member for the Economy	Expenditure/ Income - Revenue between £500,000 and £5m and Capital between £1.5m and £5m	<p>Instruction to H&F Developments Ltd to grant a lease on civic campus Affordable Start-up Unit 1</p> <p>The Council's nominee company, H&F Housing Developments Ltd acts on the instruction of the Council in all matters related to the commercial leases on the civic campus</p>	Cabinet Member for the Economy	A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.
			Ward(s): Hammersmith Broadway	
			Contact officer: Philippa Cartwright Philippa.Cartwright@lbhf.gov.uk	
Executive Director of Finance and Corporate Services	Expenditure/ Income over £5m & policies or new income, reserves use, overspend over £300K	<p>Acquisition of freehold properties</p> <p>Acquisition of freehold properties under the Refugee Housing Programme / Local Authority Housing Fund Round 2.</p>	Cabinet Member for Housing and Homelessness	A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.
Ward(s):				
Contact officer: Joe Coyne joe.coyne@lbhf.gov.uk				
Cabinet Member for the Economy	Expenditure/ Income - Revenue between £500,000 and £5m and Capital between £1.5m and £5m	<p>Civic Campus Cinema Decision</p> <p>Cabinet Member for the Economy to make a decision on entering into an agreement for the cinema lease at the Civic Campus.</p>	Cabinet Member for the Economy	A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet
Ward(s): Hammersmith Broadway				
Contact officer: Philippa Cartwright Philippa.Cartwright@lbhf.gov.uk				

Decision to be Made by (Cabinet or Council)	Type of decision	Proposed Key Decision Most decisions are made in public unless indicated below, with the reasons for the decision being made in private.	Lead Executive Councillor(s), Wards Affected, and officer to contact for further information or relevant documents	Documents to be submitted to Cabinet (other relevant documents may be submitted)
				Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.
Cabinet Member for Social Inclusion and Community Safety	Affects 2 or more wards	LET FPN fine increase Amendments to fixed penalty notice charges to be issued by Law Enforcement Team	Cabinet Member for Social Inclusion and Community Safety Ward(s): All Wards Contact officer: Mohammed Basith Mohammed.Basith@lbhf.gov.uk	A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.
Cabinet Member for Public Realm	Expenditure/ Income - Revenue between £500,000 and £5m and Capital between £1.5m and £5m	Approval for a 10 year lease on 27 Bulwer street W12 8AR We are seeking approval for a 10 year lease in the north of the borough to house our parking on street enforcement team. the search for a suitable property has been on going for the last 18 months. This property is highly suitable for our operation and will be funded from the existing parking budgets.	Cabinet Member for Public Realm Ward(s): Shepherds Bush Green Contact officer: Gary Hannaway Tel: 020 8753 gary.hannaway@lbhf.gov.uk	A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.

Decision to be Made by (Cabinet or Council)	Type of decision	Proposed Key Decision Most decisions are made in public unless indicated below, with the reasons for the decision being made in private.	Lead Executive Councillor(s), Wards Affected, and officer to contact for further information or relevant documents	Documents to be submitted to Cabinet (other relevant documents may be submitted)
Cabinet Member for Public Realm	Expenditure/ Income - Revenue between £500,000 and £5m and Capital between £1.5m and £5m	Registration and Mortuary (Fees and Charges) To agree the introduction of new service charge categories and approve the proposed uplifted fees and charges from 1 April 2024.	Cabinet Member for Public Realm	A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.
			Ward(s): All Wards	
			Contact officer: Kayode Adewumi Kayode.Adewumi@lbhf.gov.uk	
Executive Director of Place	Expenditure/ Income above £300K - Revenue up to £500k and Capital up to 1.5m	Decision to acquire a property under the Refugee Housing Programme Decision to acquire leasehold properties in the borough.	Cabinet Member for the Economy	A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.
			Ward(s): All Wards	
			Contact officer: Joe Coyne joe.coyne@lbhf.gov.uk	
Executive Director of Place	Expenditure/ Income above £300K - Revenue up to £500k and Capital up to 1.5m	Delivering affordable homes - acquisition of freehold properties Acquisition of freehold properties in the borough.	Cabinet Member for the Economy	A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet
			Ward(s): All Wards	
			Contact officer: Joe Coyne joe.coyne@lbhf.gov.uk	

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				Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.
Deputy Leader (with responsibility for Children and Education)	Expenditure/ Income - Revenue between £500,000 and £5m and Capital between £1.5m and £5m	LD Supported Accommodation at Emlyn Gardens To provide supported accommodation for up to 8 residents to live independently.	Deputy Leader (with responsibility for Children and Education) Ward(s): White City Contact officer: Adie Smith Tel: 07554 222 716 adie.smith@lbhf.gov.uk	A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.
Cabinet Member for Public Realm	Affects 2 or more wards	Suspensions Fees & Charges Uplift Uplift of Suspensions Fees & Charges to reflect current requirements.	Cabinet Member for Public Realm Ward(s): All Wards Contact officer: Oscar Turnerberg Tel: 074 9854 2978 oscar.turnerberg@lbhf.gov.uk	A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.

Decision to be Made by (Cabinet or Council)	Type of decision	Proposed Key Decision Most decisions are made in public unless indicated below, with the reasons for the decision being made in private.	Lead Executive Councillor(s), Wards Affected, and officer to contact for further information or relevant documents	Documents to be submitted to Cabinet (other relevant documents may be submitted)
Cabinet Member for Public Realm	Affects 2 or more wards	<p>Traffic Orders Fees & Charges Uplift</p> <p>Uplift of Traffic Orders Fees & Charges to reflect current requirements.</p>	<p>Cabinet Member for Public Realm</p> <hr/> <p>Ward(s): All Wards</p> <hr/> <p>Contact officer: Oscar Turnerberg Tel: 074 9854 2978 oscar.turnerberg@lbhf.gov.uk</p>	<p>A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.</p>
Executive Director of Place	Expenditure/ Income - Revenue between £500,000 and £5m and Capital between £1.5m and £5m	<p>Decision to acquire properties to support refugee resettlement - D</p> <p>This decision is one of several key decisions to enable the council to purchase properties to support refugee resettlement in line with the aims of the Refugee Housing Programme.</p>	<p>Cabinet Member for the Economy</p> <hr/> <p>Ward(s): All Wards</p> <hr/> <p>Contact officer: Joe Coyne joe.coyne@lbhf.gov.uk</p>	<p>A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.</p>
Executive Director of Place	Expenditure/ Income - Revenue between £500,000 and £5m and Capital between £1.5m and £5m	<p>Decision to acquire properties to support refugee resettlement - E</p> <p>This decision is one of several key decisions to enable the council to purchase properties to support refugee resettlement in line with the aims of the Refugee Housing Programme.</p>	<p>Cabinet Member for the Economy</p> <hr/> <p>Ward(s): All Wards</p> <hr/> <p>Contact officer: Joe Coyne joe.coyne@lbhf.gov.uk</p>	<p>A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet</p>

Decision to be Made by (Cabinet or Council)	Type of decision	Proposed Key Decision Most decisions are made in public unless indicated below, with the reasons for the decision being made in private.	Lead Executive Councillor(s), Wards Affected, and officer to contact for further information or relevant documents	Documents to be submitted to Cabinet (other relevant documents may be submitted)
				Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.
Executive Director of Place	Expenditure/ Income - Revenue between £500,000 and £5m and Capital between £1.5m and £5m	Decision to acquire properties to support refugee resettlement - F This decision is one of several key decisions to enable the council to purchase properties to support refugee resettlement in line with the aims of the Refugee Housing Programme.	Cabinet Member for the Economy Ward(s): All Wards Contact officer: Joe Coyne joe.coyne@lbhf.gov.uk	A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.
Executive Director of People	Expenditure/ Income above £300K - Revenue up to £500k and Capital up to 1.5m	Approve spend for windows related works at Langford Primary Approve spend for H&S related windows works at Langford Primary School	Deputy Leader (with responsibility for Children and Education) Ward(s): Sands End Contact officer: Anthony Mugan Anthony.Mugan@lbhf.gov.uk	A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.

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Deputy Leader (with responsibility for Children and Education)	Expenditure/ Income - Revenue between £500,000 and £5m and Capital between £1.5m and £5m	<p>Extension to Olive House Extra Care Contract</p> <p>The decision is to extend the Olive House Extra Care Contract for one year, with the option to extend for another year.</p> <p>The service is based on a core and flexi model which fits around resident's needs. This extension will provide a consistent and sustainable Extra Care Service for resident of the borough, which promotes independent living, enabling them to remain in their own home for as long as possible and reduces the need for more expensive residential care.</p>	<p>Deputy Leader (with responsibility for Children and Education)</p> <hr/> <p>Ward(s): Sands End</p> <hr/> <p>Contact officer: Jessie Ellis Jessie.Ellis@lbhf.gov.uk</p>	A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.
Cabinet Member for Public Realm	Expenditure/ Income above £300K - Revenue up to £500k and Capital up to 1.5m	<p>Linford Christie Stadium Athletics Track Refurbishment</p> <p>Refurbishment of athletics track and installation of new LED floodlights.</p>	<p>Cabinet Member for Public Realm</p> <hr/> <p>Ward(s): College Park and Old Oak</p> <hr/> <p>Contact officer: Simon Ingyon Simon.Ingyon@lbhf.gov.uk</p>	A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.
Executive Director of Place	Expenditure/ Income above £300K - Revenue up to £500k and Capital up to 1.5m	<p>Appointment of Employer's Agent for Construction Works</p> <p>Appointment of Employer's Agent for existing construction contract</p>	<p>Cabinet Member for the Economy</p> <hr/> <p>Ward(s): Hammersmith Broadway</p> <hr/> <p>Contact officer: Daniel Murray daniel.murray@lbhf.gov.uk</p>	A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet

Decision to be Made by (Cabinet or Council)	Type of decision	Proposed Key Decision Most decisions are made in public unless indicated below, with the reasons for the decision being made in private.	Lead Executive Councillor(s), Wards Affected, and officer to contact for further information or relevant documents	Documents to be submitted to Cabinet (other relevant documents may be submitted)
				Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.
Deputy Leader (with responsibility for Children and Education)	Affects 2 or more wards	Supported Living Provision Contract for the provision of supported living services for H&F residents.	Deputy Leader (with responsibility for Children and Education) Ward(s): All Wards Contact officer: Rebecca Richardson Tel: 07827879659 rebecca.richardson@lbhf.gov.uk	A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.
Cabinet Member for Housing and Homelessness, Cabinet Member for Social Inclusion and Community Safety	Affects 2 or more wards	Domestic Abuse Housing Services Policy Hammersmith & Fulham Housing Department is required to have a domestic abuse policy as part of the Social Housing Act 2023. Our Domestic Abuse Policy relates to Hammersmith & Fulham tenants and survivors of domestic abuse who apply to Hammersmith & Fulham homelessness service, and sets out how we will identify and respond to domestic abuse.	Cabinet Member for Housing and Homelessness, Cabinet Member for Social Inclusion and Community Safety Ward(s): All Wards Contact officer: Anna L K Jane Tel: 07554222791 anna.jane@lbhf.gov.uk	A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.

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Executive Director of Finance and Corporate Services	Expenditure/Income over £5m & policies or new income, reserves use, overspend over £300K	<p>Third Sector Investment Fund</p> <p>A decision, with delegated authority from Cabinet in consultation with the Cabinet Member for Social Inclusion and Community Safety, to award grants to voluntary and community sector organisations in line with the Third Sector Investment Strategy agreed by Cabinet on 15 July 2024.</p>	<p>Cabinet Member for Social Inclusion and Community Safety</p> <hr/> <p>Ward(s): All Wards</p> <hr/> <p>Contact officer: Stefan Robinson stefan.robinson@lbhf.gov.uk</p>	<p>A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.</p>
Cabinet Member for Housing and Homelessness	Budg/pol framework	<p>Council housing policy updates</p> <p>Decision to approve updated council housing policies, following a review of the council housing policy framework.</p>	<p>Cabinet Member for Housing and Homelessness</p> <hr/> <p>Ward(s): All Wards</p> <hr/> <p>Contact officer: Harriet Potemkin Harriet.Potemkin@lbhf.gov.uk</p>	<p>A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.</p>
Cabinet Member for Social Inclusion and Community Safety	Affects 2 or more wards	<p>Decision on the renewal of the Public Space Protection Orders - Use of amplifiers</p> <p>Prohibit the use of amplifiers in public spaces in Hammersmith Town Centre, Shepherds Bush, and an area of White City.</p>	<p>Cabinet Member for Social Inclusion and Community Safety</p> <hr/> <p>Ward(s): All Wards</p> <hr/> <p>Contact officer: Laura Seamons Tel: 07786965292 laura.seamons@lbhf.gov.uk</p>	<p>A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet</p>

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				Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.
Cabinet Member for Social Inclusion and Community Safety	Affects 2 or more wards	<p>Cost of Living Funding Strategy</p> <p>This report sets out the council's Cost of Living Funding Strategy for 2024/25 including the allocation of Household Support Fund grant. The Cost-of-Living programme underscores the Council's ongoing commitment to building a resilient and supportive community, ensuring that no resident is left behind. The Council is investing £6.8m across last year and this year in Cost-of-Living support, continuing to deliver a comprehensive range of support to residents including low-income older residents who have been impacted by the rise in everyday living costs, as well as other priority households and individuals.</p>	<p>Cabinet Member for Social Inclusion and Community Safety</p> <hr/> <p>Ward(s): All Wards</p> <hr/> <p>Contact officer: Matthew Sales, Bathsheba Mall</p> <p>matthew.sales@lbhf.gov.uk, Bathsheba.Mall@lbhf.gov.uk</p>	A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.
Corporate				
Cabinet Member for Housing and Homelessness		<p>Variations to Housing Repairs Contract</p> <p>Contract variation to existing housing repairs contract</p>	<p>Cabinet Member for Housing and Homelessness</p> <hr/> <p>Ward(s): All Wards</p> <hr/> <p>Contact officer: Emma Lucas Tel: 07827883247 Emma.Lucas@lbhf.gov.uk</p>	A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet Member Decisions and

Decision to be Made by (Cabinet or Council)	Type of decision	Proposed Key Decision Most decisions are made in public unless indicated below, with the reasons for the decision being made in private.	Lead Executive Councillor(s), Wards Affected, and officer to contact for further information or relevant documents	Documents to be submitted to Cabinet (other relevant documents may be submitted)
				Officer Decisions reports will be published at the start of the 3-day call-in.
Cabinet Member for Public Realm	Expenditure/ Income - Revenue between £500,000 and £5m and Capital between £1.5m and £5m	Parking Bailiff Enforcement Procurement Strategy This decision will be to sign off on the procurement strategy relating to the bailiff enforcement contract for outstanding Penalty Charge Notice (PCN) debt.	<p>Ward(s): All Wards</p> <p>Contact officer: Gary Hannaway, Bram Kainth Tel: 020 8753, Tel: 07917790900 gary.hannaway@lbhf.gov.uk , bram.kainth@lbhf.gov.uk</p>	A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.
Deputy Leader (with responsibility for Children and Education)	Expenditure/ Income - Revenue between £500,000 and £5m and Capital between £1.5m and £5m	Procurement Strategy for Community Schools Programme Refurbishment Works To refurbish Lena Gardens and Mund St. sites to serve as decant locations for schools in the Community Schools Programme	<p>Deputy Leader (with responsibility for Children and Education)</p> <p>Ward(s): Addison; Avonmore; Brook Green; Ravenscourt</p> <p>Contact officer: Anthony Mugan Anthony.Mugan@lbhf.gov.uk</p>	A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.

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Executive Director of Finance and Corporate Services	Affects 2 or more wards	<p>Community Schools Programme – Variation to the appointment of Design Team (BPTW)</p> <p>Variation to existing contract for Design Team services (encompassing architectural design services) for the Community Schools Programme.</p>	Cabinet Member for the Economy	A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.
			Ward(s): Avonmore; Ravenscourt	
			Contact officer: Patrick Vincent Patrick.Vincent@lbhf.gov.uk	
Deputy Leader (with responsibility for Children and Education)	Expenditure/ Income - Revenue between £500,000 and £5m and Capital between £1.5m and £5m	<p>Direct Award of Contract for Minterne Gardens Extra Care Service</p> <p>The decision is to agree that the Contract with Housing 21 will start from February 2023 until 31st March 2027.</p> <p>The decision is to agree that the total value of the four-year Housing 21 Minterne Gardens contract is expected to be £3,919,566.</p> <p>The service is based on a core and flexi model which fits around resident's needs. This contract will provide a consistent and sustainable Extra Care Service for resident of the borough, which promotes independent living, enabling them to remain in their own home for as long as possible and reduces the need for more expensive residential care.</p>		A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.
			Ward(s): White City; Wormholt	
			Contact officer: Johan van Wijgerden Tel: 07493864829 Johan.vanwijgerden@lbhf.gov.uk	

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Cabinet Member for Housing and Homelessness	Expenditure/ Income - Revenue between £500,000 and £5m and Capital between £1.5m and £5m	<p>Procurement Strategy/Contract Award approval to Cablesheer to support with housing voids and repairs</p> <p>We are looking for both procurement strategy and contract award approval to direct award a 3 year contract to Cablesheer. The contract will instruct work orders to Cablesheer to support our term-service patch contractors with housing voids and repairs.</p> <p>This direct award will be through a compliant Construction Framework (The national framework partnership). The contract value will be for a maximum value of £4,500,000 over a 36 month duration. The contract will apportion the spend equally at £1,500,000 per annum.</p>	Cabinet Member for Housing and Homelessness	A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.
			Ward(s): All Wards	
Cabinet Member for Housing and Homelessness	Expenditure/ Income - Revenue between £500,000 and £5m and Capital between £1.5m and £5m	<p>Approval to extend our roofing contract by 12 months.</p> <p>We seek approval to extend our existing contract with our roofing subcontractor. This contract currently supports our DLO by carrying out roofing repairs and maintenance works, on behalf of H&F Maintenance, our Direct Labour Organisation ('the DLO'). The DLO has responsibility for carrying out repairs to communal areas for most of our council housing stock. Due to the specialist nature of roofing works the DLO requires a subcontractor to carry out roofing repairs and maintenance works on its behalf.</p> <p>We initially procured this provider under a JCT measured term contract from the 16th of May 2022 until the 15th of May 2024. The original contract award allowed for a 12 month extension of the contract until the 15th of</p>	Cabinet Member for Housing and Homelessness	A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.
			Ward(s): All Wards	

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		<p>May 2025.</p> <p>We are seeking approval to action this extension of the contract until the 15th of May 2025.</p>		
Executive Director of Place	Expenditure/ Income - Revenue between £500,000 and £5m and Capital between £1.5m and £5m	<p>Alternative Ecological Mitigation at Wormwood Scrubs Contractors Procurement</p> <p>This report is seeking permission for the council to approach the market and procure contractors for the implementation of the Alternative Ecological Mitigation (AEM) Masterplan capital works and 10 Year Management and Maintenance Plan (MMP) for Wormwood Scrubs.</p>	<p>Cabinet Member for Public Realm</p> <hr/> <p>Ward(s): College Park and Old Oak</p> <hr/> <p>Contact officer: Vicki Abel Victoria.Abel@lbhf.gov.uk</p>	A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.
Deputy Leader (with responsibility for Children and Education)	Expenditure/ Income - Revenue between £500,000 and £5m and Capital between £1.5m and £5m	<p>Day Opportunities Direct Award Contract</p> <p>The purpose of this report is to approve a Direct Award to both Nubian Life and the Alzheimer's Society to the total value of £564,887. For both services, the contract ends on the 31st March 2023 and to ensure service continuity as well as planning a co-production project and tender in order that on the 1 June 2024 a revised service will be put in place.</p>	<p>Deputy Leader (with responsibility for Children and Education)</p> <hr/> <p>Ward(s): All Wards</p> <hr/> <p>Contact officer: Laura Palfreeman Tel: 0208 753 1953 Laura.Palfreeman@lbhf.gov.uk</p>	A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.

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Executive Director of People	Expenditure/ Income above £300K - Revenue up to £500k and Capital up to 1.5m	<p>Procurement Strategy for Temporary Classroom Unit at Woodlane High School</p> <p>Provision of 20 additional temporary spaces at Woodlane High Schools</p>	<p>Deputy Leader (with responsibility for Children and Education)</p> <hr/> <p>Ward(s): All Wards</p> <hr/> <p>Contact officer: Anthony Mugan Anthony.Mugan@lbhf.gov.uk</p>	<p>A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.</p>
Cabinet Member for Housing and Homelessness	Expenditure/ Income - Revenue between £500,000 and £5m and Capital between £1.5m and £5m	<p>Direct Award via the Southeast Consortium Framework for a Windows installation/replacement contractor</p> <p>We are seeking approval to compliantly direct award a 3 year, £3,000,000 windows installation and replacement contract via the Southeast Consortium Framework.</p> <p>This contract will provide the council with the additional capacity required to support our increasing work order demand within the repairs service.</p>	<p>Cabinet Member for Housing and Homelessness</p> <hr/> <p>Ward(s): All Wards</p> <hr/> <p>Contact officer: Richard Buckley richard.buckley@lbhf.gov.uk</p>	<p>A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.</p>
Executive Director of Place	Expenditure/ Income above £300K - Revenue up to £500k and Capital up to 1.5m	<p>Procurement of a Marquee for the refurbished Hammersmith Town Hall</p> <p>The Council is seeking to procure a marquee for the outdoor area of the rooftop bar and restaurant on Level 06 of the refurbished Town Hall</p>	<p>Cabinet Member for the Economy</p> <hr/> <p>Ward(s): Hammersmith Broadway</p> <hr/> <p>Contact officer: Philippa Cartwright Philippa.Cartwright@lbhf.gov.uk</p>	<p>A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet</p>

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				Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.
Cabinet Member for the Economy	Expenditure/ Income - Revenue between £500,000 and £5m and Capital between £1.5m and £5m	<p>Procurement and Installation of Audio Visual Equipment, Desk Booking and Smart Technology within the refurbished Town Hall</p> <p>The Council is seeking to tender for works to procure and install the following:</p> <ul style="list-style-type: none"> - Audio Visual equipment - Desk Booking technology - Smart technology 	<p>Cabinet Member for the Economy</p> <hr/> <p>Ward(s): Hammersmith Broadway</p> <hr/> <p>Contact officer: Philippa Cartwright</p> <p>Philippa.Cartwright@lbhf.gov.uk</p>	A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.
Executive Director of Place	Expenditure/ Income above £300K - Revenue up to £500k and Capital up to 1.5m	<p>Procure joinery works in relation to large Furniture and Fixtures at the refurbished Town Hall</p> <p>The Council is seeking to tender a joinery package for the provision of two large reception desks and a bar counter at the refurbished Town Hall</p>	<p>Cabinet Member for the Economy</p> <hr/> <p>Ward(s): Hammersmith Broadway</p> <hr/> <p>Contact officer: Philippa Cartwright</p> <p>Philippa.Cartwright@lbhf.gov.uk</p>	A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.

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Cabinet Member for the Economy	Expenditure/ Income above £300K - Revenue up to £500k and Capital up to 1.5m	<p>Fulham Library & Macbeth Centre Roof Replacement</p> <p>Roof Replacement works</p>	<p>Cabinet Member for the Economy</p> <hr/> <p>Ward(s): Fulham Reach</p> <hr/> <p>Contact officer: Sebastian Mazurczak Tel: 020 8753 1707 Sebastian.Mazurczak@lbhf.gov.uk</p>	A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.
Deputy Leader (with responsibility for Children and Education)	Expenditure/ Income - Revenue between £500,000 and £5m and Capital between £1.5m and £5m	<p>GLA funding for Primary School Universal Free School Meals</p> <p>The Mayor for London announced £130 million of one-off funding to ensure all school children at publicly funded primary schools in London can receive free school meals for the academic year beginning in September 2023.</p> <p>The funding allocation for Hammersmith & Fulham is funding for schools to implement the meal provision for children in Key Stage 2 who are not otherwise eligible for free school meals.</p>	<p>Deputy Leader (with responsibility for Children and Education)</p> <hr/> <p>Ward(s): All Wards</p> <hr/> <p>Contact officer: Marcus Robinson Marcus.RobinsonCHS@lbhf.gov.uk</p>	A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.
Executive Director of Place	Expenditure/ Income above £300K - Revenue up to £500k and Capital up to 1.5m	<p>Procurement of a works contract for Commercial office block lobby fit-out (Civic Campus)</p> <p>The existing build contract is for shell and core only. Work is required to fit-out the lobby area.</p>	<p>Cabinet Member for the Economy</p> <hr/> <p>Ward(s): Hammersmith Broadway</p> <hr/> <p>Contact officer: Philippa Cartwright Philippa.Cartwright@lbhf.gov.uk</p>	A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet

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				Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.
Executive Director of Place	Expenditure/ Income above £300K - Revenue up to £500k and Capital up to 1.5m	<p>Procurement of furniture for Ground to floor 5 of the Civic Campus</p> <p>As part of the transition of the workforce to the Civic Campus, furniture is required in order to allow the workforce to continue to deliver the services it currently does.</p>	<p>Cabinet Member for the Economy</p> <hr/> <p>Ward(s): Hammersmith Broadway</p> <hr/> <p>Contact officer: Philippa Cartwright Philippa.Cartwright@lbhf.gov.uk</p>	A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.
Executive Director of Place	Expenditure/ Income above £300K - Revenue up to £500k and Capital up to 1.5m	<p>Approval to award contract for 6th Floor Terrace Landscaping Works (Civic Campus)</p> <p>The refurbishment of the Civic Campus building is currently underway. A contract is required to procure for the work on the roof garden, which will be on the 6th floor terrace.</p>	<p>Cabinet Member for the Economy</p> <hr/> <p>Ward(s): Hammersmith Broadway</p> <hr/> <p>Contact officer: Philippa Cartwright Philippa.Cartwright@lbhf.gov.uk</p>	A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.

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Executive Director of Finance and Corporate Services	Expenditure/ Income above £300K - Revenue up to £500k and Capital up to 1.5m	Contract award for provision of disrepair and void works Contract award for the provision of disrepair works	Cabinet Member for Housing and Homelessness Ward(s): All Wards Contact officer: Emma Lucas Tel: 07827883247 Emma.Lucas@lbhf.gov.uk	A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.
Executive Director of Finance and Corporate Services	Expenditure/ Income above £300K - Revenue up to £500k and Capital up to 1.5m	Procurement Strategy for Garage Refurbishment Approval for the strategy to procure a contractor to deliver the Phase 3 programme of refurbishment works to garages on housing land.	Cabinet Member for Housing and Homelessness Ward(s): All Wards Contact officer: Emma Lucas Tel: 07827883247 Emma.Lucas@lbhf.gov.uk	A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.
Deputy Leader (with responsibility for Children and Education)	Expenditure/ Income - Revenue between £500,000 and £5m and Capital between £1.5m and £5m	Procurement Strategy for Voucher Payment Solution Procurement Strategy for the provision of closed loop supermarket vouchers	Deputy Leader (with responsibility for Children and Education) Ward(s): All Wards Contact officer: Marcus Robinson Marcus.RobinsonCHS@lbhf.gov.uk	A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet

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				Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.
Cabinet Member for Finance and Reform	Expenditure/ Income - Revenue between £500,000 and £5m and Capital between £1.5m and £5m	<p>CONTRACT EXTENSION FOR VARIABLE DATA PRINTING SERVICES</p> <p>The Council's four-year contract for variable data print services ended on 30 November 2021. This contract included printing and mailing communications for several Council services, including revenues and benefits, housing and electoral services. These services continue to go through a programme of transformation, with a focus on improved digital delivery. A new two-year contract (with the option to extend for a further two years) was recommended to ensure short-term stability of service as this transformation is embedded and services focus on Covid recovery.</p> <p>The contract was awarded to the current supplier, (Financial Data Management Ltd) who had performed well throughout the contract and continues to actively support the council in the delivery of a wide range of business-critical services. As such, and to ensure ongoing service delivery, an extension of a further 2 years as per the terms of the contract awarded in Nov 2021, is considered to be the most efficient and economically advantageous solution. The extension of the contract will be on the same terms and conditions as the current contract, where costs are incurred based on actual service volumes.</p>	<p>Cabinet Member for Finance and Reform</p> <hr/> <p>Ward(s): All Wards</p> <hr/> <p>Contact officer: Jamie Mullins Tel: 020 8753 1650 Jamie.Mullins@lbhf.gov.uk</p>	A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.

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		This provides for the opportunity to reduce printing and mailing costs as the Council expands its' programme of digitalisation across these service areas		
Cabinet Member for Housing and Homelessness	Expenditure/ Income - Revenue between £500,000 and £5m and Capital between £1.5m and £5m	<p>Procurement Strategy for Housing Lift Modernisation of Barton and Jepson House</p> <p>To maintain the lift service, it has been recommended that works to modernise the lift should be carried out. This will both improve the reliability of the lifts and reduce future running costs.</p>	<p>Ward(s): All Wards</p> <p>Contact officer: Akeem Durojaye akeem.durojaye@lbhf.gov.uk</p>	A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.
Cabinet Member for Public Realm	Expenditure/ Income - Revenue between £500,000 and £5m and Capital between £1.5m and £5m	<p>Smart Transport - Traffic Data Procurement</p> <p>To procure Smart Transport to handle the Parking departments on-street data collection needs.</p>	<p>Cabinet Member for Public Realm</p> <p>Ward(s): All Wards</p> <p>Contact officer: Oscar Turnerberg Tel: 074 9854 2978 oscar.turnerberg@lbhf.gov.uk</p>	A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.

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Cabinet Member for Housing and Homelessness	Expenditure/ Income - Revenue between £500,000 and £5m and Capital between £1.5m and £5m	<p>Short-Term Contract Variation to Council Repairs Contract (LOT 3)</p> <p>This report is seeking approval to temporarily vary the Mears Central Repairs contract. This variation will involve allowing for additional temporary supervisory and administrative support as well as an enhancement on the current contract rates.</p> <p>The variation will involve cost changes totalling up to £680,000. This will be a temporary variation for a 17-week period.</p>	<p>Cabinet Member for Housing and Homelessness</p> <hr/> <p>Ward(s): All Wards</p> <hr/> <p>Contact officer: Nick Marco-Wadey Tel: 07988490264 Nick.Marco-Wadey@lbhf.gov.uk</p>	A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.
Strategic Director, Chief Operating Officer, Corporate Services	Expenditure/ Income above £300K - Revenue up to £500k and Capital up to 1.5m	<p>Extension of call off contract for the Portal, E forms & CRM system</p> <p>To approve the award to Granicus-Firmstep Limited of a two-year permitted extension to the existing call off contract. The total value of the contract to date is £850k. The estimated minimum value of this 2-year extension is £340k.</p>	<p>Cabinet Member for Finance and Reform</p> <hr/> <p>Ward(s): All Wards</p> <hr/> <p>Contact officer: Ashley Bryant, Darren Persaud ashley.bryant@lbhf.gov.uk, Darren.Persaud@lbhf.gov.uk</p>	A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.
Cabinet Member for the Economy	Expenditure/ Income - Revenue between £500,000 and £5m and Capital between £1.5m and £5m	<p>Procurement and award of consultancy contract</p> <p>Procurement and award of a contract under a call-off procedure from "Yorkshire Purchasing Organisation 001141 Managing Consultancy and Professional Services Framework" to Reed Specialist Recruitment trading as</p>	<p>Cabinet Member for the Economy</p> <hr/> <p>Ward(s): All Wards</p> <hr/> <p>Contact officer: Mo Goudah, Matthew Rumble</p>	A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting.

Decision to be Made by (Cabinet or Council)	Type of decision	Proposed Key Decision Most decisions are made in public unless indicated below, with the reasons for the decision being made in private.	Lead Executive Councillor(s), Wards Affected, and officer to contact for further information or relevant documents	Documents to be submitted to Cabinet (other relevant documents may be submitted)
		Consultancy+ for the provision of professional consultancy services in relation to leisure and recreational infrastructure.	mo.goudah@lbhf.gov.uk, matt.rumble@lbhf.gov.uk	Cabinet Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.
Executive Director of Finance and Corporate Services	Expenditure/ Income above £300K - Revenue up to £500k and Capital up to 1.5m	Major Refurbishment of Derwent Court W6 Award of contract to carry out major refurbishment works to 1-10 Derwent Court W6. Works include new roof covering, new windows and doors, and general fabric repairs and redecoration.	Cabinet Member for Housing and Homelessness Ward(s): Ravenscourt Contact officer: Vince Conway Tel: 020 8753 1915 Vince.Conway@lbhf.gov.uk	A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.
Cabinet Member for Public Realm	Expenditure/ Income - Revenue between £500,000 and £5m and Capital between £1.5m and £5m	Pan London Contract on the Future of Micro-mobility Authority to negotiate terms, agree charges and enter into contracts related to e-bike hire and e-scooter hire contracts .	Cabinet Member for Public Realm Ward(s): All Wards Contact officer: Masum Choudhury Masum.Choudhury@lbhf.gov.uk	A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.

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Cabinet Member for Public Realm	Expenditure/ Income - Revenue between £500,000 and £5m and Capital between £1.5m and £5m	Leisure Contract Variation Leisure Contract Variation	Cabinet Member for Public Realm	A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.
			Ward(s): All Wards	
			Contact officer: Simon Ingyon Simon.Ingyon@lbhf.gov.uk	
Cabinet Member for Public Realm	Expenditure/ Income - Revenue between £500,000 and £5m and Capital between £1.5m and £5m	Procurement of Toxicology Provision for West London Coroner's Court This report seeks approval to procure a 3-year contract, with the option to extend for up to 2 further years for toxicology services. The toxicology contract is to be awarded by the London Borough of Hammersmith and Fulham on behalf of the West London Coroner's Service.	Cabinet Member for Public Realm	A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.
			Ward(s): All Wards	
			Contact officer: Kayode Adewumi Kayode.Adewumi@lbhf.gov.uk	
Executive Director of People	Expenditure/ Income above £300K - Revenue up to £500k and Capital up to 1.5m	Direct Award Report of Spot Contract to Living With Equal Opportunities This is a decision to directly award a 2-year spot contract worth £340 000 to Living With Equal Opportunities (LWEO) in order to regularise existing arrangements starting 1st October 2024 to 30th September 2026	Cabinet Member for Adult Social Care and Health	A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet
Ward(s): All Wards				
Contact officer: Lydia Sabatini Lydia.Sabatini@lbhf.gov.uk				

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		<p>The reason for this decision is to ensure that residents have access to a responsive and good quality service in an area with insufficient local provision and to allow time for commissioners to coproduce a new model for day opportunities to be tendered for in 2025/6.</p> <p>A timeline and plan is in place the co-production and governance around a new service model to take place by the end of this contract extension.</p> <p>2 years also provides enough time to monitor the contract and terminate it if it is found to be underperforming</p> <p>A waiver will go to Contract Assurance Board.</p> <p>A strategy paper for a reprocurement will be presented in 2025.</p>		<p>Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.</p>
Cabinet Member for Housing and Homelessness	Expenditure/Income over £5m & policies or new income, reserves use, overspend over £300K	<p>Award of contract for White City major refurbishment Phase 1 incorporating works to Batman Close, Davis House, Evans House, Mackay House, White City estate W12</p> <p>This report seeks approval to award a contract for the major refurbishment of eleven blocks forming part of the White City estate W12.</p> <p>The scheme was included in the Procurement Strategy approved by December 22 Cabinet, which identified sites for investment during the period 2023-2025.</p>	<p>Cabinet Member for Housing and Homelessness</p> <hr/> <p>Ward(s): White City</p> <hr/> <p>Contact officer: Vince Conway Tel: 020 8753 1915 Vince.Conway@lbhf.gov.uk</p>	<p>A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.</p>

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Cabinet Member for Public Realm	Expenditure/ Income - Revenue between £500,000 and £5m and Capital between £1.5m and £5m	<p>Strategy and Award of contract to GHD for Neighbourhood Improvements and Place Shaping Projects via the Neutral Vendor Model of the Ealing Framework</p> <p>Professional services for civil and traffic engineering design, project management and community engagement</p>	<p>Cabinet Member for Public Realm</p> <hr/> <p>Ward(s): All Wards</p> <hr/> <p>Contact officer: Russell Trewartha Tel: 07551680551 Russell.Trewartha@lbhf.gov.uk</p>	A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.
Cabinet Member for Public Realm	Affects 2 or more wards	<p>Highway Asset Management Strategy</p> <p>Highway Asset Management Strategy outlines how the highway will be managed in the future.</p>	<p>Cabinet Member for Public Realm</p> <hr/> <p>Ward(s): All Wards</p> <hr/> <p>Contact officer: Ian Hawthorn Tel: 020 8753 3058 ian.hawthorn@lbhf.gov.uk</p>	A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.
Executive Director of People	Expenditure/ Income above £300K - Revenue up to £500k and Capital up to 1.5m	<p>Direct Award to Jontek for the Careline Alarm Receiving Centre Platform</p> <p>Hammersmith & Fulham (H&F) Careline is a critical emergency alarm receiving service, safeguarding approximately 3,000 residents, primarily comprising elderly and vulnerable individuals within the borough. Jontek's</p>	<p>Cabinet Member for Adult Social Care and Health</p> <hr/> <p>Ward(s): All Wards</p> <hr/> <p>Contact officer: Jessie Ellis Jessie.Ellis@lbhf.gov.uk</p>	A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet

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		<p>platform, Answerlink, is the current provider of the Careline Alarm Receiving Centre Platform (ARC) used by H&F Careline to manage and respond to calls and emergency alerts from residents, including telecare.</p> <p>The decision is to direct award to Jontek to provide Answerlink.</p>		Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.
Executive Director of People	Expenditure/ Income above £300K - Revenue up to £500k and Capital up to 1.5m	<p>Direct Award Report of Statutory Advocacy Services to Libra Partnership</p> <p>Direct award of contract for two years</p>	<p>Cabinet Member for Adult Social Care and Health</p> <hr/> <p>Ward(s): All Wards</p> <hr/> <p>Contact officer: Lydia Sabatini Lydia.Sabatini@lbhf.gov.uk</p>	A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.
Executive Director of People	Expenditure/ Income above £300K - Revenue up to £500k and Capital up to 1.5m	<p>Direct Award Report of Carers Services to Carers Network</p> <p>2 year direct award.</p>	<p>Cabinet Member for Adult Social Care and Health</p> <hr/> <p>Ward(s): All Wards</p> <hr/> <p>Contact officer: Lydia Sabatini Lydia.Sabatini@lbhf.gov.uk</p>	A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.

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Deputy Leader (with responsibility for Children and Education)	Expenditure/ Income - Revenue between £500,000 and £5m and Capital between £1.5m and £5m	<p>Procurement Strategy for Fulham Bilingual School Windows</p> <p>The report sets out the procurement strategy for works to repair or, were necessary, replace windows at Fulham Bilingual School.</p>	Deputy Leader (with responsibility for Children and Education)	<p>A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.</p>
			Ward(s): Parsons Green & Sandford	
			Contact officer: Anthony Mugan Anthony.Mugan@lbhf.gov.uk	
Deputy Leader (with responsibility for Children and Education)	Expenditure/ Income - Revenue between £500,000 and £5m and Capital between £1.5m and £5m	<p>Procurement Strategy for Langford Window Upgrade</p> <p>The report sets out the proposed procurement strategy for works to repair where possible, or replace if necessary, the windows at Langford Primary School</p>	Deputy Leader (with responsibility for Children and Education)	<p>A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.</p>
			Ward(s): Sands End	
			Contact officer: Anthony Mugan Anthony.Mugan@lbhf.gov.uk	
Executive Director of Finance and Corporate Services	Expenditure/ Income - Revenue between £500,000 and £5m and Capital between £1.5m and £5m	<p>Land and Property Based IT CMS</p> <p>Award to Idox Software limited of 24 months contract under the Crown Commercial Service Vertical Application Solutions (CCS VAS) call off framework for the provision of Land and property case management system</p>	Cabinet Member for Finance and Reform	<p>A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet</p>
			Ward(s): All Wards	
			Contact officer: Graham Pottle Tel: 07733 038 882 graham.pottle@lbhf.gov.uk	

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				Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.
Executive Director of Finance and Corporate Services	Expenditure/ Income above £300K - Revenue up to £500k and Capital up to 1.5m	Global Custody Services, Award of Contract - Pension Fund Contract award for supplier of asset servicing to LBHF pension fund through LGPS framework.	Cabinet Member for Finance and Reform Ward(s): All Wards Contact officer: Phil Triggs, Mat Dawson ptriggs@westminster.gov.uk , mdawson@westminster.gov.uk	A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.
Cabinet Member for Adult Social Care and Health	Expenditure/ Income - Revenue between £500,000 and £5m and Capital between £1.5m and £5m	Procurement Strategy for a Tier 2 Adult Weight Management Service Public Health wish to commission a Tier 2 Weight Management Service.	Cabinet Member for Adult Social Care and Health Ward(s): All Wards Contact officer: Charis Champness Charis.Champness@lbhf.gov.uk	A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.

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Executive Director of Finance and Corporate Services	Affects 2 or more wards	<p>Contract Award Report – Consultancy Services Framework Engineering Surveys</p> <p>Direct Award to Ingleton Wood LLP using Hammersmith and Fulham Consultancy Framework Lot 5</p>	<p>Cabinet Member for Housing and Homelessness</p> <hr/> <p>Ward(s): All Wards</p> <hr/> <p>Contact officer: Gavin Duncumb Gavin.duncumb@lbhf.gov.uk</p>	A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.
Executive Director of Finance and Corporate Services	Expenditure/ Income above £300K - Revenue up to £500k and Capital up to 1.5m	<p>Procurement strategy and award of contract for the major refurbishment of various void properties</p> <p>Major refurbishment of 6 void properties including structural works and extension and reconfiguration to 1 property</p>	<p>Cabinet Member for Housing and Homelessness</p> <hr/> <p>Ward(s): College Park and Old Oak; White City; Wormholt</p> <hr/> <p>Contact officer: Vince Conway Tel: 020 8753 1915 Vince.Conway@lbhf.gov.uk</p>	A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.
Executive Director of Finance and Corporate Services	Expenditure/ Income above £300K - Revenue up to £500k and Capital up to 1.5m	<p>Phase 3 LED lighting contract for block communal lighting</p> <p>We have recently completed phase 1 and phase 2 of the LED lighting programme for block communal lighting. To keep on track with our LED lighting programme time and specification delivery targets, we now need to embark on phase 3 of the LED</p>	<p>Cabinet Member for Housing and Homelessness</p> <hr/> <p>Ward(s): All Wards</p> <hr/> <p>Contact officer: Nick Marco-Wadey Tel: 07988490264 Nick.Marco-Wadey@lbhf.gov.uk</p>	A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet

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		<p>programme in Q4 of 2024.</p> <p>This will involve LED lighting upgrades to the following properties: 22 Housing Blocks, 28 Tenants Resident Association Halls and 83 plant rooms which Contains Boilers, Pumps etc. We estimate that the cost of this work will be around £1,200,000.</p> <p>We recommend the approval of a compliant contract direct award to Openview Security Solutions Limited via the Fusion 21 'Building Safety and Compliance' Framework. The contract will be for £1,200,000.'</p>		<p>Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.</p>
Cabinet Member for Public Realm	Affects 2 or more wards	<p>Cashless Parking Solution Procurement</p> <p>Carry out a procurement exercise for the councils Pay & Display mobile operator.</p>	<p>Cabinet Member for Public Realm</p> <hr/> <p>Ward(s): All Wards</p> <hr/> <p>Contact officer: Oscar Turnerberg Tel: 074 9854 2978 oscar.turnerberg@lbhf.gov.uk</p>	<p>A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.</p>
Executive Director of Finance and Corporate Services	Expenditure/ Income above £300K - Revenue up to £500k and Capital up to 1.5m	<p>Award of contract for spandrel panel replacement and associated works on four high-rise blocks</p> <p>This report seeks approval to award a works contract to enable the continuation of a programme to replace insulated panels forming part of the external walls of residential buildings, either fixed to masonry or incorporated into</p>	<p>Cabinet Member for Housing and Homelessness</p> <hr/> <p>Ward(s): Fulham Reach; Sands End; Lillie; Ravenscourt</p> <hr/> <p>Contact officer: Vince Conway Tel: 020 8753 1915 Vince.Conway@lbhf.gov.uk</p>	<p>A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet Member</p>

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		window frames.		Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.
Executive Director of Finance and Corporate Services	Affects 2 or more wards	<p>Water Hygiene and legionella Management Services</p> <p>Contract for the provision of water hygiene and legionella management services in the Council's domestic and communal water systems. The contract will encompass remedial works resulting from regular testing and risk assessments. This is a 12-month contract with a value of up to £600,000.</p>	<p>Cabinet Member for Housing and Homelessness</p> <hr/> <p>Ward(s): All Wards</p> <hr/> <p>Contact officer: Mara Akrivelli Mara.Akrivelli@lbhf.gov.uk</p>	A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.
Cabinet Member for Adult Social Care and Health	Expenditure/ Income - Revenue between £500,000 and £5m and Capital between £1.5m and £5m	<p>Direct Award of Floating Support Services to Hestia</p> <p>Hestia provide homelessness prevention services which need to be directly awarded while a recommission is undertaken.</p>	<p>Cabinet Member for Adult Social Care and Health</p> <hr/> <p>Ward(s): All Wards</p> <hr/> <p>Contact officer: Lydia Sabatini Lydia.Sabatini@lbhf.gov.uk</p>	A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.

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Cabinet Member for Adult Social Care and Health	Expenditure/ Income above £300K - Revenue up to £500k and Capital up to 1.5m	<p>Careline Alarm Receiving Centre Platform</p> <p>The IT platform that Careline staff are using to receive and respond to alarms.</p>	<p>Cabinet Member for Adult Social Care and Health</p> <hr/> <p>Ward(s): All Wards</p> <hr/> <p>Contact officer: Johan van Wijgerden Tel: 07493864829 Johan.vanwijgerden@lbhf.gov.uk</p>	A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.
Cabinet Member for Public Realm	Expenditure/ Income above £300K - Revenue up to £500k and Capital up to 1.5m	<p>Contract Award of the On Street Residential Chargepoint Scheme (ORCS 4) Grant</p> <p>Award of a contract to deliver 23 on-street fast electric vehicle charging points.</p>	<p>Cabinet Member for Public Realm</p> <hr/> <p>Ward(s): All Wards</p> <hr/> <p>Contact officer: Masum Choudhury Masum.Choudhury@lbhf.gov.uk</p>	A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.
Cabinet Member for Housing and Homelessness	Affects 2 or more wards	<p>Extension and Modification of Asbestos Term-Service Contract</p> <p>In relation to our term-service contract for asbestos which is due to expire on the 27th of September 2025 we are seeking approval to: 1) Extend the contract by 24 months. This extension is allowed in line with the contract provisions.</p>	<p>Cabinet Member for Housing and Homelessness</p> <hr/> <p>Ward(s): All Wards</p> <hr/> <p>Contact officer: Richard Buckley richard.buckley@lbhf.gov.uk</p>	A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet

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		2) Modify the overall contract sum for the entire 7 year term from £2,250,000 to £2,470,173.84.		Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.
Cabinet Member for Housing and Homelessness	Expenditure/ Income - Revenue between £500,000 and £5m and Capital between £1.5m and £5m	<p>Electrical Term-Service Contract</p> <p>We seek approval to:</p> <p>1) Mutually terminate the term-service contract with AJS Ltd. Effective immediately on governance clearance.</p> <p>2) Award the reserve contract to Openview Security Solutions Ltd. Effective immediately on governance clearance.</p> <p>3) Award Openview the contract for its full term (with extensions) until the 31st of July 2027. This will be for a maximum contract value of £4,900,000</p>	<p>Cabinet Member for Housing and Homelessness</p> <hr/> <p>Ward(s): All Wards</p> <hr/> <p>Contact officer: Richard Buckley richard.buckley@lbhf.gov.uk</p>	A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.
Cabinet Member for Housing and Homelessness	Affects 2 or more wards	<p>Extension and Modification of Asbestos Remediation Term-Service Contract</p> <p>We are seeking approval to:</p> <p>1) Extend our Asbestos Remedial Term-Service contract with Cablesheer (Asbestos) Limited. We seek to action the 24 month contract allowable extension. This extension will cover the period of 01st of August 2025 until the 31st of July 2027.</p> <p>2) We seek approval to extend the total contract value from £1,382,341.33 to £1,673,721.</p>	<p>Cabinet Member for Housing and Homelessness</p> <hr/> <p>Ward(s): All Wards</p> <hr/> <p>Contact officer: Richard Buckley richard.buckley@lbhf.gov.uk</p>	A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.

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Cabinet Member for Adult Social Care and Health	Expenditure/ Income - Revenue between £500,000 and £5m and Capital between £1.5m and £5m	<p>Elgin Resource Centre</p> <p>This report requests approval to award a contract for day services to Elgin Close Resource Centre.</p>	<p>Cabinet Member for Adult Social Care and Health</p> <hr/> <p>Ward(s): All Wards</p> <hr/> <p>Contact officer: Jessie Ellis Jessie.Ellis@lbhf.gov.uk</p>	<p>A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.</p>
Cabinet Member for Adult Social Care and Health	Expenditure/ Income - Revenue between £500,000 and £5m and Capital between £1.5m and £5m	<p>Healthwatch procurement</p> <p>This decision seeks approval to commence a procurement exercise for the provision of Healthwatch services in Hammersmith & Fulham.</p>	<p>Cabinet Member for Adult Social Care and Health</p> <hr/> <p>Ward(s): All Wards</p> <hr/> <p>Contact officer: Jessie Ellis Jessie.Ellis@lbhf.gov.uk</p>	<p>A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.</p>
Executive Director of Finance and Corporate Services	Expenditure/ Income above £300K - Revenue up to £500k and Capital up to 1.5m	<p>Lift Modernisation Upgrades at Barton and Jepson House</p> <p>We seek approval to undertake a procurement for the Lift modernisation works required at Barton and Jepson House. Across these two properties, we have four lifts that require necessary upgrades to ensure compliance with regulations in relation to Lift</p>	<p>Cabinet Member for Housing and Homelessness</p> <hr/> <p>Ward(s): Sands End</p> <hr/> <p>Contact officer: Nick Marco-Wadey Tel: 07988490264 Nick.Marco-Wadey@lbhf.gov.uk</p>	<p>A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet</p>

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		<p>Safety and Performance.</p> <p>We are recommending an open tender. We anticipate the cost of these works costing £1,400,000. We anticipate these Lift upgrades taking up to 63 weeks to complete.</p>		<p>Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.</p>
Executive Director of Place	Expenditure/ Income above £300K - Revenue up to £500k and Capital up to 1.5m	<p>Contract Variation for the Purchase and Installation of Purpose-built Community Room and WC Portacabins for Linford Christie</p> <p>To approve the contract variation for the provision of additional portable cabin facilities to Coleman & Company Limited for a value of up to £338,000.</p>	<p>Cabinet Member for the Economy</p> <hr/> <p>Ward(s): Wormholt</p> <hr/> <p>Contact officer: Chris Nolan, Sebastian Mazurczak Tel: 020 8753 1707 Chris.Nolan@lbhf.gov.uk, Sebastian.Mazurczak@lbhf.gov.uk</p>	<p>A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.</p>
Executive Director of Finance and Corporate Services	Affects 2 or more wards	<p>Procurement of Geographical Information System (GIS)</p> <p>Procurement of new long term sovereign LBHF-only Geographical Information System</p>	<p>Cabinet Member for Finance and Reform</p> <hr/> <p>Ward(s): All Wards</p> <hr/> <p>Contact officer: Roland de la Mothe Tel: 07776 672584 Roland.delaMothe@lbhf.gov.uk</p>	<p>A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.</p>

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CABINET - 13 January				
Cabinet	Expenditure/Income over £5m & policies or new income, reserves use, overspend over £300K	<p>Council Tax Support Scheme 24/26</p> <p>The Council has a statutory duty to set the council tax each year and this report is part of this process. The Council can only vary or set council tax discounts or higher amounts as legally empowered to do so. The relevant regulations and legislation are the Local Government Finance Act 1992, the Local Authorities (Calculation of Council Tax Base) Regulations 2012, and the Council Tax (Prescribed Classes of Dwellings) (England) Regulations 2003, as amended in 2012. The Council Tax base has been calculated in accordance with the relevant Acts and regulations.</p>	<p>Cabinet Member for Finance and Reform</p> <hr/> <p>Ward(s): All Wards</p> <hr/> <p>Contact officer: Kirsty Brooksmith Tel: 07785531091 Kirsty.Brooksmith@lbhf.gov.uk</p>	<p>A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.</p>
Cabinet	Expenditure/Income over £5m & policies or new income, reserves use, overspend over £300K	<p>Council Tax Base and Collection Rate 2025/26 and Delegation of the Business Rate Estimate</p> <p>This report is a statutory requirement that sets the Council Tax base for the purposes of the 2025/26 revenue budget.</p>	<p>Cabinet Member for Finance and Reform</p> <hr/> <p>Ward(s): All Wards</p> <hr/> <p>Contact officer: Jamie Mullins Tel: 020 8753 1650 Jamie.Mullins@lbhf.gov.uk</p>	<p>A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.</p>

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Cabinet	Affects 2 or more wards	<p>EHC Personal Budgets Policy</p> <p>The Personal Budget Policy sets out H&F's person-centered approach intended to give parents, carers and young people more flexibility, choice and control over the support they use and enables them to make their own decisions as a family about what works best for them in relation to the Education provision specified in the child or young person's Education, Health and Care Plan.</p>	<p>Deputy Leader (with responsibility for Children and Education)</p> <hr/> <p>Ward(s): All Wards</p> <hr/> <p>Contact officer: Roisin Conroy, Joe Gunning Tel: 07387099855, Tel: 07769672031 Roisin.conroy@lbhf.gov.uk, Joe.Gunning@lbhf.gov.uk</p>	<p>A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.</p>
Cabinet	Affects 2 or more wards	<p>Tree Strategy Adoption</p> <p>Adaption of Key Strategy for the borough.</p>	<p>Cabinet Member for Public Realm</p> <hr/> <p>Ward(s): All Wards</p> <hr/> <p>Contact officer: Jessica Bastock, Ian Hawthorn Tel: 020 8753 3058 jessica.bastock@lbhf.gov.uk , ian.hawthorn@lbhf.gov.uk</p>	<p>A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.</p>
Cabinet	Affects 2 or more wards	<p>Joint Waste Strategy</p> <p>Report outlining the joint waste strategy for Western Riverside Waste Authority and constituent boroughs</p>	<p>Cabinet Member for Public Realm</p> <hr/> <p>Ward(s): All Wards</p> <hr/> <p>Contact officer: Mark Raisbeck, Annie Baker mark.raisbeck@lbhf.gov.uk,</p>	<p>A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet</p>

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			Annie.Baker@lbhf.gov.uk	Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.

CABINET - 10 February

Cabinet	Expenditure/Income over £5m & policies or new income, reserves use, overspend over £300K	<p>CAPITAL PROGRAMME MONITOR & BUDGET VARIATIONS, 2024/25 (THIRD QUARTER)</p> <p>This report reports the quarter 3 position to Cabinet and seeks revisions to the Capital Programme which require the approval of Cabinet in accordance with the Council's financial regulations.</p>	<p>Cabinet Member for Finance and Reform</p> <hr/> <p>Ward(s): All Wards</p> <hr/> <p>Contact officer: Andre Mark Tel: 020 8753 7227 andre.mark@lbhf.gov.uk</p>	A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.
Cabinet		<p>HOUSING REVENUE ACCOUNT (HRA) BUDGET FOR 2025/26</p> <p>This report sets out the HRA budget proposals for the financial year 2025/26.</p>	<p>Cabinet Member for Housing and Homelessness</p> <hr/> <p>Ward(s): All Wards</p> <hr/> <p>Contact officer:</p>	A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.

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Cabinet		<p>Treasury Management Strategy Statement 2025/26</p> <p>This report sets out the Council's Treasury Management Strategy for 2025/26</p>	<p>Cabinet Member for Finance and Reform</p> <hr/> <p>Ward(s): All Wards</p> <hr/> <p>Contact officer:</p>	<p>A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.</p>
Cabinet	Expenditure/ income over £5m & policies or new income, reserves use, overspend over £300K	<p>FOUR YEAR CAPITAL PROGRAMME 2025/26 AND CAPITAL STRATEGY 2025/26</p> <p>This report sets out an updated four-year capital expenditure and resource forecast and a capital programme and strategy for 2025/26 to 2028/29</p>	<p>Cabinet Member for Finance and Reform</p> <hr/> <p>Ward(s): All Wards</p> <hr/> <p>Contact officer: Andre Mark Tel: 020 8753 7227 andre.mark@lbhf.gov.uk</p>	<p>A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.</p>
Cabinet	Affects 2 or more wards	<p>REVENUE BUDGET AND COUNCIL TAX LEVELS 2025/26</p> <p>To approve the Revenue Budget and Council Tax levels for 2025.26</p>	<p>Cabinet Member for Finance and Reform</p> <hr/> <p>Ward(s): All Wards</p> <hr/> <p>Contact officer: Sukvinder Kalsi Sukvinder.Kalsi@lbhf.gov.uk</p>	<p>A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet</p>

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				Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.
Cabinet	Expenditure/Income over £5m & policies or new income, reserves use, overspend over £300K	School Budget (Dedicated Schools Grant) 2025/26 To approve the schools budget funding formula for allocating resources to H&F schools for the financial year 2025/26	Deputy Leader (with responsibility for Children and Education) <hr/> Ward(s): All Wards <hr/> Contact officer: Tony Burton tony.burton@lbhf.gov.uk	A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.
Cabinet	Expenditure/Income over £5m & policies or new income, reserves use, overspend over £300K	Early Years Dedicated Schools Grant budget for the financial year 2025/26 To approve the Early Years Dedicated Schools Grant budget for the financial year 2025/26	Deputy Leader (with responsibility for Children and Education) <hr/> Ward(s): All Wards <hr/> Contact officer: Tony Burton tony.burton@lbhf.gov.uk	A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.

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Cabinet	Affects 2 or more wards	<p>H&F Suicide Prevention Strategy, 2024-27</p> <p>This decision is to adopt a new suicide prevention strategy for H&F for 2024-27</p>	<p>Cabinet Member for Adult Social Care and Health</p> <hr/> <p>Ward(s): All Wards</p> <hr/> <p>Contact officer: Jessica Dawson jessica.dawson@lbhf.gov.uk</p>	<p>A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.</p>
Cabinet	Affects 2 or more wards	<p>Update on 'Upstream London': the vision for the next phase of the Council's Industrial Strategy</p> <p>This report presents to Cabinet an update on the development of the next phase of the Council's pioneering Industrial Strategy: Upstream London, launched in late November at an event at the new WEST Youth Zone in White City. The goal is to make the borough a global hub of innovation and inclusive growth.</p> <p>It follows the establishment of a partnership with world-leading Imperial College London in 2017 to establish a cluster of science, technology, engineering, maths, medicines and media (STEM³) businesses around Imperial's existing research and development to create a world-leading economic ecosystem in future industries.</p> <p>The Council has now set a clear strategy to grow a localised economic ecosystem, with a focus on the sectors that are set to grow</p>	<p>Cabinet Member for the Economy</p> <hr/> <p>Ward(s): All Wards</p> <hr/> <p>Contact officer: David Pack david.pack@lbhf.gov.uk</p>	<p>A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.</p>

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		<p>and that are deemed right for the local area. This comes at a time when the Greater London Authority is developing their London Growth Plan, set to launch in January 2025.</p> <p>Since the inception of our Industrial Strategy, the Council has helped to generate £6billion of high-growth business investment, creating over 13,000 jobs, increasing opportunities in the community through working closely with partners including anchor institutions, businesses and investors.</p> <p>At the same event and as a central part of Upstream London, the Council also launched the Upstream Pathway Bond, a groundbreaking initiative giving people a clearer pathway into new careers and more opportunities to develop new skills.</p> <p>By utilising relationships with businesses and with the international partnerships the Council has developed, young people will have more opportunities than ever before.</p> <p>Organisations who sign up offer advice, work experience, apprenticeships, interview skills, mentoring and inspiration - even travelling abroad to experience our partner innovation districts. In return, businesses have a highly-skilled workforce on their doorstep.</p> <p>This report covers a 'white paper' vision document launched at the late November event mentioned above; structures put in place to ensure a 'whole Council' approach to delivery, with appropriate Member oversight; proposals for staff engagement; and the</p>		

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		intention to put in place a delivery plan.		
Cabinet	Affects 2 or more wards	<p>Private Rented Sector Policy</p> <p>This report proposes the adoption of a new Private Rented Sector (PRS) policy for Hammersmith and Fulham (H&F) to ensure that private rented housing standards in the borough are among the best in London.</p>	<p>Cabinet Member for Housing and Homelessness</p> <hr/> <p>Ward(s): All Wards</p> <hr/> <p>Contact officer: Matthew Sales matthew.sales@lbhf.gov.uk</p>	A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.

CABINET - 3 March

Cabinet	Expenditure/Income over £5m & policies or new income, reserves use, overspend over £300K	<p>Redevelopment of White City Central</p> <p>Redevelopment of the central area in the White City Estate</p>	<p>Cabinet Member for the Economy</p> <hr/> <p>Ward(s): White City</p> <hr/> <p>Contact officer: Matthew Rumble matt.rumble@lbhf.gov.uk</p>	A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.
Cabinet	Expenditure/Income over £5m & policies or new income, reserves	<p>Hartopp & Lannoy Appropriation</p> <p>A report seeking approval to appropriate the land known as Hartopp & Lannoy Land for</p>	<p>Cabinet Member for the Economy</p> <hr/> <p>Ward(s): Munster</p>	A detailed report for all decisions going to Cabinet will be available at

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	use, overspend over £300K	planning purposes to facilitate the redevelopment of the land and engage powers under Section 203 of the Housing and Planning Act 2016.	Contact officer: Labab Lubab Tel: 020 8753 4203 Labab.Lubab@lbhf.gov.uk	least five working days before the date of the meeting. Cabinet Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.
Cabinet	Expenditure/Income - Revenue between £500,000 and £5m and Capital between £1.5m and £5m	Refurbishment of void properties to expand supported housing provision This decision requests approval of a number of recommendations that will enable the council to invest in the refurbishment of three void properties so as to achieve an important expansion of its domestic abuse refuge provision.	Cabinet Member for the Economy Ward(s): All Wards Contact officer: Joe Coyne, Mo Goudah joe.coyne@lbhf.gov.uk, mo.goudah@lbhf.gov.uk	A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.
Cabinet	Expenditure/Income over £5m & policies or new income, reserves use, overspend over £300K	Local Electric Vehicle Infrastructure (LEVI) Grant Acceptance Acceptance of the indicative LEVI grant allocation of £7.4m on behalf of the sub-regional partnership. Creation of associated income and expenditure accounts and administering of funds on behalf of the partnership as the lead authority.	Cabinet Member for Public Realm Ward(s): Contact officer: Masum Choudhury Masum.Choudhury@lbhf.gov.uk	A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet Member Decisions and Officer Decisions reports will be published at

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				the start of the 3-day call-in.
Cabinet	Affects 2 or more wards	<p>Public Realm Works Procurement</p> <p>Highways works framework is ending in April 2026 this is a strategy to enhance the procurement to be a one council contract for all public realm type works across multiple departments</p>	<p>Cabinet Member for Public Realm</p> <hr/> <p>Ward(s): All Wards</p> <hr/> <p>Contact officer: Ian Hawthorn Tel: 020 8753 3058 ian.hawthorn@lbhf.gov.uk</p>	A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.
Cabinet	Expenditure/Income over £5m & policies or new income, reserves use, overspend over £300K	<p>Secondary Power in communal areas (Firefighting Lifts).</p> <p>Due to changes in fire safety guidance and a commitment to enhance fire safety, the Lift service team have undertaken a review of Lift infrastructure and potential safety performance in the event of a fire. This review has determined that within high rise buildings and sheltered schemes improvements are required to ensure that lift operability is maintained in the event of a fire.</p> <p>To convert our current lift stock into 'firefighting lifts' the Lift service team seek to undertake a phased programme for a contractor to install secondary power units within communal areas to 68 high risk profile buildings (see the detailed analysis for further information). These secondary power units will allow Lift provision to the fire service in the event of a fire.</p>	<p>Cabinet Member for Housing and Homelessness</p> <hr/> <p>Ward(s): All Wards</p> <hr/> <p>Contact officer: Richard Buckley richard.buckley@lbhf.gov.uk</p>	A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.

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		We seek approval to procure this programme and award a contract to a winning bidder. We also seek to award a 'reserve contract' to the second-place bidder.		
Cabinet	Expenditure/Income over £5m & policies or new income, reserves use, overspend over £300K	<p>Procurement strategy for Hammersmith & Fulham's sexual health offer</p> <p>This report seeks approval for to take part in the procurement of clinic-based genito-urinary medicine (GUM) and sexual and reproductive health (SRH) services and e-services being procured by the City of London, as part of Hammersmith & Fulham Council's ongoing participation in the pan London sexual health programme. These services are mandated functions under the Health and Social Care Act (2012), which requires each local authority to provide, or secure the provision of, open access sexual health services in its area including: access to all types of contraception, preventing the spread of sexually transmitted infections (STIs); through treating and testing of STIs.</p> <p>The new contract is set to commence from 1st April 2025, as part of the London Sexual Health Programme (LSHP), under Provider Selection Regime Direct Award Process C.</p> <p>This report has two recommendations:</p> <p>1. After considering the Procurement Strategy, to delegate authority to the Cabinet Member for Adult Social Care and Health to directly awarding the contract through a compliant procurement process under PSR 2023 Direct</p>	<p>Cabinet Member for Adult Social Care and Health</p> <hr/> <p>Ward(s): All Wards</p> <hr/> <p>Contact officer: Craig Holden Tel: 07850 541 477 Craig.Holden@lbhf.gov.uk</p>	A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.

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		<p>Award Process C to Chelsea and Westminster Hospital NHS Foundation Trust (“ChelWest”), for the provision of GUM Sexual Health Services. The contract is planned to commence on the 01/04/2025 for a period of two years, with an option to extend for a further four years through two extension periods of two years each (six-years total). The projected value of the contract is £17,855,628 for six years.</p> <p>2. Agree to Hammersmith and Fulham participating in the pan London Sexual Health Programme, which would mean agreeing to City of London leading on the procurement of the sexual health e-services. The anticipated costs for these services is £4,200,000 for a seven year contract.</p>		
Cabinet	Affects 2 or more wards	<p>2024/25 Corporate Revenue Monitor - Month 9 (December 2024)</p> <p>To note the Council's forecast position.</p>	<p>Cabinet Member for Finance and Reform</p> <hr/> <p>Ward(s): All Wards</p> <hr/> <p>Contact officer: Sukvinder Kalsi Sukvinder.Kalsi@lbhf.gov.uk</p>	<p>A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.</p>

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CABINET - June				
Cabinet	Affects 2 or more wards	<p>Emergency Planning & Business Continuity Cabinet Report</p> <p>The Council has responsibilities under the Civil Contingencies Act 2004 to plan and respond to emergencies and to have business continuity arrangements in place to reduce the risk of service disruption.</p> <p>This report provides an overview of activity over the previous year and the priorities and dynamic work plan for the forthcoming year.</p> <p>The reporting period covered by this Cabinet Report is from 01 October 2023, to 30 December 2024. The report highlights areas of work for the current financial year to ensure continuous improvement in the service.</p>	<p>Cabinet Member for Social Inclusion and Community Safety</p> <hr/> <p>Ward(s): All Wards</p> <hr/> <p>Contact officer: Neil Thurlow, Denise Prieto Tel: 0208 753 2286 Neil.Thurlow@lbhf.gov.uk, Denise.Prieto@lbhf.gov.uk</p>	<p>A detailed report for all decisions going to Cabinet will be available at least five working days before the date of the meeting. Cabinet Member Decisions and Officer Decisions reports will be published at the start of the 3-day call-in.</p>