

# **BIRMINGHAM CITY COUNCIL**

## **CABINET**

**TUESDAY, 26 JULY 2022 AT 10:00 HOURS**  
**IN COMMITTEE ROOM C, COUNCIL HOUSE EXTENSION, 6**  
**MARGARET ST, BIRMINGHAM, B3 3BG**

## **A G E N D A**

### **1 NOTICE OF RECORDING/WEBCAST**

The Chair to advise/meeting to note that this meeting will be webcast for live or subsequent broadcast via the Council's meeting You Tube site ([www.youtube.com/channel/UCT2kT7ZRPFCXq6\\_5dnVnYlw](http://www.youtube.com/channel/UCT2kT7ZRPFCXq6_5dnVnYlw)) and that members of the press/public may record and take photographs except where there are confidential or exempt items.

### **2 APOLOGIES**

To receive any apologies.

### **3 DECLARATIONS OF INTERESTS**

Members are reminded that they must declare all relevant pecuniary and non pecuniary interests arising from any business to be discussed at this meeting. If a disclosable pecuniary interest is declared a Member must not speak or take part in that agenda item. Any declarations will be recorded in the minutes of the meeting.

### **4 EXEMPT INFORMATION – POSSIBLE EXCLUSION OF THE PRESS AND PUBLIC**

a) To highlight reports or appendices which officers have identified as containing exempt information within the meaning of Section 100I of the Local Government Act 1972, and where officers consider that the public interest in maintaining the exemption outweighs the public interest in disclosing the information, for the reasons outlined in the report.

b) To formally pass the following resolution:-

**RESOLVED** – That, in accordance with Regulation 4 of the Local Authorities (Executive Arrangements) (Meetings and Access to Information) (England) Regulations 2012, the public be excluded from the meeting

during consideration of those parts of the agenda designated as exempt on the grounds that it is likely, in view of the nature of the business to be transacted or the nature of the proceedings, that if members of the press and public were present there would be disclosure to them of exempt information.

- |                  |    |                                                                                                                                    |
|------------------|----|------------------------------------------------------------------------------------------------------------------------------------|
| <u>5 - 36</u>    | 5  | <b><u>FINANCIAL MONITORING REPORT QUARTER 1 2022/23</u></b>                                                                        |
|                  |    | This report is from Director of Council Management                                                                                 |
| <u>37 - 86</u>   | 6  | <b><u>CORPORATE PLAN 2022 -2026</u></b>                                                                                            |
|                  |    | Report of the Director of Council Management.                                                                                      |
| <u>87 - 162</u>  | 7  | <b><u>SELLY PARK CONSERVATION AREA APPRAISAL AND MANAGEMENT PLAN, PROPOSED BOUNDARY CHANGES AND ARTICLE 4 DIRECTION</u></b>        |
|                  |    | Strategic Director Place, Prosperity and Sustainability                                                                            |
| <u>163 - 230</u> | 8  | <b><u>ST. AGNES MOSELEY CONSERVATION AREA APPRAISAL AND MANAGEMENT PLAN, PROPOSED BOUNDARY CHANGES AND ARTICLE 4 DIRECTION</u></b> |
|                  |    | Strategic Director Place, Prosperity and Sustainability                                                                            |
| <u>231 - 312</u> | 9  | <b><u>BIRMINGHAM 3 CITIES WHOLE HOUSE RETROFIT PILOT</u></b>                                                                       |
|                  |    | Report of Strategic Director - City Housing                                                                                        |
| <u>313 - 344</u> | 10 | <b><u>BALSALL HEATH COMMUNITY GOVERNANCE REVIEW – RECOMMENDATIONS</u></b>                                                          |
|                  |    | Report of the Managing Director City Operations                                                                                    |
| <u>345 - 352</u> | 11 | <b><u>REFUGEE RESETTLEMENT SCHEMES YEAR 2-5 CONTRACTS</u></b>                                                                      |
|                  |    | Report of Director for Adult Social Care                                                                                           |
| <u>353 - 366</u> | 12 | <b><u>CONTRACT EXTENSION - CIVIL PARKING ENFORCEMENT SERVICES (P129)</u></b>                                                       |
|                  |    | Report of Managing Director - City Operations                                                                                      |
| <u>367 - 452</u> | 13 | <b><u>HACKNEY CARRIAGE – MAXIMUM FARE</u></b>                                                                                      |
|                  |    | Report of the Strategic Director City Operations                                                                                   |
| <u>453 - 490</u> | 14 | <b><u>KINGS HEATH AND LADYWOOD COMMUNITY CENTRES BOILER REPLACEMENT</u></b>                                                        |
|                  |    | Report of the Strategic Director of City Operations                                                                                |

**491 - 496**

15 **APPOINTMENTS TO OUTSIDE BODIES**

Report of the Interim City Solicitor.

**497 - 512**

16 **PLANNED PROCUREMENT ACTIVITIES (AUGUST 2022 – OCTOBER 2022)**

Report of Assistant Director - Procurement

17 **OTHER URGENT BUSINESS**

To consider any items of business by reason of special circumstances (to be specified) that in the opinion of the Chair are matters of urgency.





# Birmingham City Council

## Report to Cabinet

26<sup>TH</sup> JULY 2022



**Subject:** FINANCIAL MONITORING REPORT 2022/23  
QUARTER 1 (UP TO 30<sup>TH</sup> JUNE 2022)

**Report of:** Director of Council Management and S151 Officer –  
Rebecca Hellard

**Relevant Cabinet Member:** Councillor Yvonne Mosquito – Finance & Resources

**Relevant O & S Chair(s):** Councillor Akhlaq Ahmed - Resources

**Report author:** Director of Finance (Deputy S151 Officer) – Sara Pitt

Are specific wards affected?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No – All wards affected
If yes, name(s) of ward(s):		
Is this a key decision?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No
If relevant, add Forward Plan Reference: 010137/2022		
Is the decision eligible for call-in?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No
Does the report contain confidential or exempt information?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
If relevant, provide exempt information paragraph number or reason if confidential:		

### 1 Executive Summary

- 1.1 The quarterly finance report attached as Appendix A is part of the City Council's robust financial management arrangements.

### 2 Recommendations

That the Cabinet:-

- 2.1 Approves an increase in the Capital Budget for 2022/23 of £162.7m as set out in paragraph 4.6. Resulting in a revised capital budget of £694.4m
- 2.2 Approves the writing off of a debt over £0.025m as described in paragraph 4.11.
- 2.3 Notes that the Council faces a number of challenges in 2022/23. However, the Council is in a strong robust position with strong financial planning processes in place. Reserves are healthy and within recommended limits.
- 2.4 Notes that due to the improvements in the restructuring of cost centres to improve financial management this is a high level report. A more detailed report will be available at quarter 2.
- 2.5 Notes the Treasury Management and Investment Portfolio Reports that are included in Appendix A at Annex 2 and 3.
- 2.6 Notes that under authority delegated by Cabinet on 16 April 2019 to the Cabinet Member for Finance and Resources, the council accepted an offer from BEIS (Department for Business, Energy & Industrial Strategy) to extend and recycle the Advanced Manufacturing Supply Chain Initiative (AMSCI) and Regional Growth Funds (RGF) awards and to amend the National Manufacturing Competitive Levels (NMCL) programme. These funds are held as Accountable Body by the council and are under fund management by Finance Birmingham Ltd (FB) and their sister company, Frontier Development Capital Ltd (FDC). Further detail is provided in Appendix A Annex 4.

### **3 Background**

- 3.1 At the meeting on 22nd February 2022, the Council agreed a net revenue budget for 2022/2023 of £759.2m to be met by government grants, council tax and business rates. Appendix A sets out the high level financial position at Quarter 1.

### **4 Key Issues**

#### **Revenue position**

- 4.1 Unlike many Councils we undertake a rolling review of our budget all year rather than as a one off annual process, so are constantly looking at the pressures we are facing or may have to face in the future, giving us an early warning and time to react and put in place actions to manage impacts.
- 4.2 The Director of Council Management will be presenting a Medium Term Financial plan update report to Cabinet in October providing an update on the financial pressures the Council is facing and the mitigating actions being taken.
- 4.3 Appendix A sets out in Section 12 a number of risks that have been identified at this early stage in the year. Whilst there are potential pressures, there is sufficient time for these to be quantified and mitigating actions taken to ensure a balanced revenue position by the end of the year.

- 4.4 In Section 13 of Appendix A, a number of opportunities to reduce expenditure are described. More details will be provided in later reports.

### **Capital Programme**

- 4.5 A capital budget of £531.7m was set in the Financial Plan 2022/23 and approved by full Council on the 22<sup>nd</sup> February 2022. Like all financial years capital spend is weighted towards the later end of the year, and often spend will slip in to the following year due to the complex nature of many of the capital projects.
- 4.6 Following slippage at the end of 2021/22, Cabinet is asked to approve an increase of £162.7m in the revised Capital budget for 2022/23 from £531.7m to £694.4m.

### **Treasury Management and Investment Portfolio**

- 4.7 Gross loan debt is currently £3,035m, with the year-end projection estimated to be £3,272m, this is below the planned level of £3,452m. The annual cost of servicing debt represents approximately 29.5% of the net revenue budget.
- 4.8 The Council's treasury investments are currently at £61m, against a planned level of £40m. The Council's cash balances are no longer at elevated levels from government support for Covid and energy relief and the Council expects to resume short term borrowing from the next quarter.
- 4.9 Details are set out in the Appendix A Annex 2.
- 4.10 The Investment Portfolio is reported in Appendix A Annex 3.

### **Write-Offs**

- 4.11 The schedule at Appendix A, Annex 1 paragraph 1.3 summarises debts recommended for write off of over £0.025m.

## **5 Options considered and Recommended Proposal**

- 5.1 CLT have recently adopted a set of budget management principles to ensure the delivery of a balanced budget this year whilst delivering Best in Class Services. These principles include the agreement that all overspends, demands, growth and pressures should be managed and contained at a Directorate level. Any residual gap must be managed across CLT collectively.
- a balanced budget by the end of the year

## **6 Consultation**

- 6.1 The Leader, the Cabinet Member for Finance and Resources, Directors, the City Solicitor and the Director HR & Organisational Development have been consulted in the preparation of this report.
- 6.2 There are no additional issues beyond consultations carried out as part of the budget setting process for 2022/23.

## **7 Risk Management**

- 7.1 The monitoring of the Council's budget and the identification of actions to address issues arising, as set out in this report, are part of the Council's arrangements for the management of financial issues.

## **8 Compliance Issues:**

### **8.1 How are the recommended decisions consistent with the City Council's priorities, plans and strategies?**

- 8.1.1 The budget is integrated with the Council Financial Plan, and resource allocation is directed towards policy priorities.

### **8.2 Legal Implications**

- 8.2.1 Section 151 of the 1972 Local Government Act requires the Chief Finance Officer (as the responsible officer) to ensure the proper administration of the City Council's financial affairs. Budget control, which includes the regular monitoring of and reporting on budgets, is an essential requirement placed on Directorates and members of the Corporate Management Team by the City Council in discharging the statutory responsibility. This report meets the City Council's requirements on budgetary control for the specified area of the City Council's Directorate activities.
- 8.2.2 Under Section 1 of the Localism Act 2011, the Council has the power to enter into the arrangements set out in this report, which are within the remit and limits of the general power of competence Section 2 and 4 of the Localism Act 2011.
- 8.2.3 Section 111 of the Local Government Act 1972 contains the Council's ancillary financial and expenditure powers in relation to the discharge of its functions.

### **8.3 Financial Implications**

- 8.3.1 The Appendix attached gives details of the risks, potential financial pressures the city council faces and actions to be taken to ensure service delivery within available resources.

### **8.4 Procurement Implications (if required)**

- 8.4.1 N/A

**8.5 Human Resources Implications (if required)**

8.5.1 N/A

**8.6 Public Sector Equality Duty**

8.6.1 There are no additional Equality Duty or Equality Analysis issues beyond any already assessed in the year to date. Any specific assessments needed shall be made by Directorates in the management of their services.

**9 Background Documents**

9.1 City Council Financial Plan 2022/23 approved at Council 22nd February 2022



## APPENDIX A

### 1.1 Quarter 1 (Month 3) Financial Monitoring Report 2022/23

#### 1. High Level Summary Financial Position

- 1.1. At the Council Meeting on the 22<sup>nd</sup> February 2022 Birmingham City Council approved a net revenue budget of £759.2m for the 2022/23 financial year. This report sets out for Cabinet the high-level performance against that budget at the end of the first quarter, any anticipated risks and the mitigating factors to ensure a balanced budget is delivered this financial year.
- 1.2. The budget for 2022/23 when approved by full Council in February was balanced, however there was a gap for future years of £33m. An approach to balance the budget has now been developed and agreed and work is underway to deliver a balanced budget for future years through the rolling Medium Term Financial Plan (MTFP) process.
- 1.3. In the financial year 2021/22, the Council underspent by £17.8m. Cabinet on the 28<sup>th</sup> June 2022 approved the transfer of this balance to the Financial Resilience Reserve (FRR) to be used to manage future budget risks.
- 1.4. The Council like all other local authorities is facing a number of financial challenges in 2022/23, including the ongoing impact of Brexit on the costs of goods and services especially in the construction industry and social care market. Rising costs of goods and services including energy and fuel. The impact from the unrest in Ukraine, and the cost-of-living crisis all of which are affecting many residents and resulting in a greater demand on our services.
- 1.5. While we have seen other Councils failing due to poor governance and decision making, weak procurement, low levels of reserves and over borrowing. Birmingham City Council is in a strong robust position with strong financial planning processes in place. Reserves are healthy and within recommended limits. Borrowing is not excessive and is reducing and the Council scores well on the CIPFA Resilience Index Indicators, where levels of borrowing and reserves are key, but CIPFA also look at delivery of savings and a strong budget process.
- 1.6. The Council is a CIPFA 3-star Financial Management authority recognising the significant financial management improvements made across the organisation since the Council was awarded a 1-star rating in 2019. The Council has achieved a growing national reputation. We are continuing to further improve and aim for a 4-star rating by April 2023.
- 1.7. Unlike many Councils we undertake a rolling review of our budget all year rather than as a one-off annual process, so are constantly looking at the pressures we are facing or may have to face in the future, giving us early warning and time to react and put in place actions to manage impacts.
- 1.8. We are constantly horizon scanning and alert to changes in rising costs and pressures on our budget. The introduction of the spend controls put in place in

November 2021 (and continuing), being an example which we saw work at the end of the last financial year.

- 1.9. The Council's Leadership Team (CLT) have adopted a set of budget management principles as well as striving to achieve Best In Class services and always seeking value for money and continuous improvement in services for our citizens. CLT has agreed the principle that all overspends, demands, growth and pressures should be managed and contained at a Directorate level. Any residual gap must be managed across CLT collectively.
- 1.10. The Director of Council Management will be presenting a Medium-Term Financial plan update report to Cabinet in October providing an update on the financial plan, the pressures the Council is facing and the mitigating actions being taken to deliver a balanced budget over the medium term.
- 1.11. The Council is also continuing to lobby the Government for fair funding where we can, and welcomes the announcement made at the recent Local Government Association Annual Conference by the then Levelling Up Secretary Michael Gove confirming that councils in England will receive a two year funding settlements from next year to help them plan with a greater degree of confidence.
- 1.12. Due to the restructuring of cost centres to improve Financial Management this report does not contain the same detailed spend reports and is a high-level report detailing the anticipated risks and mitigation actions for the financial year.
- 1.13. Work is underway to identify the full costs of the risks that have been identified, and to ensure that mitigating actions are put in place in order to achieve a balanced position at year end.
- 1.14. The high-level budget approved on 22<sup>nd</sup> February 2022 is shown below:



**Table 1: High Level Budget**

Directorate	Budget
	£m
Children & Families	329.589
City Operations	192.682
City Housing	15.369
Place, Prosperity and Sustainability	61.844
Strategy, Equalities and Partnerships	3.253
Adult Social Care	357.744
Council Management	93.212
<b>Directorate Sub Total</b>	<b>1,053.693</b>
Corporate Budgets	(294.461)
<b>Corporate Subtotal</b>	<b>(294.461)</b>
<b>City Council General Fund Budget</b>	<b>759.232</b>

1.15. Like previous financial years the Financial Plan for 2022/23 includes budgeted savings, these total £40.8m. There are also previously undelivered savings of £2.1m that are being monitored. Work is underway to ensure delivery of these savings with any risks to the delivery being managed and mitigated. Last year, 91% of savings were delivered and we will aim to deliver similar levels this year as well.

1.16. To help manage costs and mitigate the in-year forecast overspend in 2021/22 the council introduced a series of spending controls. The key areas of spend under control were staffing, properties / facilities management, and procurement. These controls were implemented in November 2021 and continue to remain in place for this financial year. The panels operate to provide some rigour and corporate oversight to spend, and not to prevent all spend.

## **2. Capital**

2.1. A capital budget of £531.7m was set in the Financial Plan 2022/23 and approved by full Council on the 22<sup>nd</sup> February 2022. Like all financial year's capital spend is weighted towards the later end of the year, and often spend will slip into the following year due to the complex nature of many of the capital projects.

2.2. Following slippage at the end of 2021/22, Cabinet is asked to approve an increase of £162.7m to the Capital budget for 2022/23 from £531.7m to £694.4m.

2.3. Delivery of the Capital Programme will be closely monitored over the year. There remain risks to delivery, particularly relating to cost pressures and

material shortages for construction projects, these will be kept under review and appropriate action taken to mitigate.

- 2.4. It is important to note that no financial resources will be lost if there is slippage in the programme's expenditure at the end of the financial year. The resources and planned expenditure will be "rolled forward" into future years.

### **3. Medium Term Financial Plan (MTFP)**

- 3.1. As stated previously, the Director of Council Management will be presenting a Medium-Term Financial plan update report to Cabinet in October. This will contain details of the new pressures and opportunities, and report on the plans that are being developed to deal with the gap identified in 2023/24 in the Financial Plan for 2022/23.
- 3.2. There was a gap of £33m in future years when the Financial Plan was agreed in February 2022. The MTFP update will provide due diligence on existing growth and any new growth and develop new plans to make savings to bridge the gap. Benchmarking will be used to help identify services where there can then be a deep dive to identify opportunities to make savings.

### **4. Delivery Plan**

- 4.1. The Delivery Plan is designed to support transformation enabling work, which is increasingly focussing on invest to save initiatives that will improve citizen outcomes whilst reducing net service delivery costs. There is £13.6m set aside in Policy Contingency in the Financial Plan to fund projects that have already been approved. Further projects may be funded from the Delivery Plan Reserve during the financial year, and these will be detailed in future financial monitoring reports.

### **5. Policy Contingency**

- 5.1. The 2022/23 budget includes a Policy Contingency budget of £48.0m, excluding savings to be allocated of £30.9m. The Policy Contingency budget is held centrally and not allocated to services at the start of the financial year. It is retained to protect against unplanned expenditure or when the costs of certain decisions which may be taken during the course of the financial year become clearer. Allocations will be made to services only after the demonstration of need and are subject to review and approval by the Chief Finance Officer with the exception of allocations from General Contingency which will be approved by Cabinet.

**Table 2: Policy Contingency Budget 2022/23**

<b>Policy Contingency</b>	<b>£m</b>
Inflation Contingency	20.930
Delivery Plan	13.619
SEND Improvement	2.792
Workforce Equalities	2.000
Apprenticeship Levy	1.308
Short-term Improvement in the Council House	1.000
Loss of Income from Car Park Closures	0.252
Corporate Funding for Owning & Driving Performance (ODP) Culture Change Programme	0.129
Transport - Funding for Young People	1.228
General Contingency	4.724
<b>Total Policy Contingency excluding savings</b>	<b>47.982</b>
Contract Savings	(1.147)
Capitalisation of Transformation costs - to be allocated to services in 2022/23	(20.000)
Fit for Purpose savings	(9.802)
<b>Total Savings to be allocated</b>	<b>(30.949)</b>
<b>Total Policy Contingency</b>	<b>17.033</b>

## 6. Collection Fund

- 6.1. The overall net budget for Council Tax income including Parish and Town Council Precepts is £403.0m in 2022/23. In addition, the Council collects the precepts on behalf of the Fire and Police Authorities. At this early stage in the financial year the Council is on track to achieve this, however Collection Rates will be closely monitored given current economic risks.
- 6.2. Under the 100% Business Rates Pilot that came into effect on 1st April 2017 the Council continues to retain 99% of all Business Rates collected under the Business Rates Retention Scheme with 1% being paid over to the West Midlands Fire Authority. The overall budgeted level of Business Rates in 2022/23 is £355.6m (excluding the Enterprise Zone), of which the Council's retained share is £352.0m. Again, this is currently on track, but both Collection Rates and Business Rates Appeals will be closely monitored during the year.

## 7. Housing Revenue Account (HRA)

- 7.1. The HRA budget is forecast to spend to overall budget, but the new calls on this budget starting in the next 12 months require a review of the allocation of the HRA budget to ensure that funds are still focussed on priorities. This will take place over the next 12 weeks, but will remain within the self-funded HRA cash envelope

## **8. Dedicated Schools Grant (DSG)**

- 8.1. The Dedicated Schools Grant (DSG) is the main funding stream for schools and education services. The allocation of DSG announced by the Department for Education (DfE) on 30th March 2022, was set at £1,374.2m for 2022/23 before deductions for academies, Business Rates and direct funding of high needs places by Education and Skills Funding Agency. The allocation after those deductions is £686.9m. This is allocated as follows: school block £377.2m, High Needs block £210.4m, Early Years block £83.0m and £16.3m Central School Services Block, which is held centrally for the Local Authority to carry out central functions on behalf of pupils in maintained schools and academies. It is anticipated that there will be a balanced position at year end.

## **9. Borrowing**

- 9.1. Gross loan debt is currently £3,035m, with the year-end projection estimated to be £3,272m, this is below the planned level of £3,452m. The annual cost of servicing debt represents approximately 29.5% of the net revenue budget. The planned level of debt and annual cost of servicing debt currently includes over £200m borrowing for the Enterprise Zone (EZ), due to be financed from Business Rates growth within the EZ.
- 9.2. The Council's treasury investments are currently at £61m, against a planned level of £40m. The Council's cash balances are no longer at elevated levels from government support for Covid and energy relief and the Council expects to resume short-term borrowing from the next quarter.
- 9.3. Further Treasury Management information is contained in Annex 2 to this report.

## **10. Investment Property Portfolio**

- 10.1. Details of changes in the Council's Investment Property Portfolio in Quarter 1 are provided in Annex 3, as well as confirmation that the CIPFA Treasury Code had been complied with, as has the Council's Service and Commercial Investment Strategy and its Investment Property Strategy.

## **11. BEIS Fund Extensions and Amendments**

- 11.1. Cabinet is asked to note that under authority delegated by Cabinet on 16 April 2019 to the Cabinet Member for Finance and Resources, the council accepted an offer from BEIS (Department for Business, Energy & Industrial Strategy) to extend and recycle the Advanced Manufacturing Supply Chain Initiative (AMSCI) and Regional Growth Funds (RGF) awards and to amend the National Manufacturing Competitive Levels (NMCL) programme. These funds are held

as Accountable Body by the council and are under fund management by Finance Birmingham Ltd (FB) and their sister company, Frontier Development Capital Ltd (FDC). Further detail is provided in Annex 4.

## **12. Reserves**

12.1. At the end of 2021/22, the Council had total reserves of £1,071.6m. This included £230.1m of General Reserves and Balances, broken down by:

12.2. £38.4m General Fund Balance. This is more than 4.5% of the net budget, as approved by Cabinet in November 2020. There is no planned use of the General Fund Balance in 2022/23.

12.3. £125.5m of Financial Resilience Reserve (FRR), this is after the £17.8m underspend in 2021/22 was transferred to it. This provides extra financial resilience in these very uncertain times and will be used to manage in year risks if required.

12.4. £66.2m Delivery Plan Reserve (DPR). The DPR was established to enable the necessary investment required by the Council's Delivery Plan. It also contains the previous Invest to Save Reserve. It is expected that once business cases for the Delivery Plan projects have been finalised there will be further drawdowns during 2022/23. Details of these drawdowns will be included in future financial monitoring reports.

12.5. Whilst reserve levels are considered adequate, they require continuous monitoring. The Council cannot be complacent and must continue to maintain financial rigour, particularly with regard to delivering planned savings, accumulated debt and associated financing costs and financial income collection.

12.6. During this financial year the Council will be undertaking a forensic review of all reserves to identify if there are any reserves that are no longer required for the purpose that they were originally created and will re purpose any that are identified.

## **13. Write offs**

13.1. Annex 1 covers write offs of unrecoverable Housing Benefit, including one of over £25,000 that Cabinet are asked to approve.

## **14. Potential Risks**

14.1. When the budget was set for 2022/23, growth of around £70m was built in for known pressures (excluding the Commonwealth Games). Some of these growth items were one-off and some will remain ongoing.

- 14.2. There were also risks that were identified when setting the budget (as shown in Appendix E of the Financial Plan agreed by Council on 22<sup>nd</sup> February 2022).
- 14.3. In Appendix E, after weighting the risks for probability, there was a total risk of £118m.
- 14.4. There were service specific risks identified of £46m, including £25m for Highways PFI alternative arrangements, £8m for Adult Social Care demand, and £8m for Children and Families, covering Children's Trust demand, SENAR and Home to School Transport.
- 14.5. There were corporate risks of £72m identified, including £21m related to the Collection Fund, £13m related to potential delays in Capital disposals, and £6m related to Savings Delivery. There was £1m related to inflationary pressures, but it would seem likely that will not be sufficient.
- 14.6. As mentioned above, there was a total risk of £118m. Given that not all risks would be expected to happen at the same time, a deflator of 70% was applied, leaving a total risk of £34.5m. This is more than covered by the General Fund Balance of £38.4m and the FRR balance of £125.5m.
- 14.7. Below are details of the potential risks that have been identified by each of the operational divisions of the Council, split into risks that were identified in Appendix E and new risks identified since then.

## **Already Identified Risks by Department**

### **Adult Social Care**

- 14.8. **Demand for Adult Social Care** continues to remain hard to predict over the next 12 months as the impact of the last two years of coronavirus has created the risk of a surge in numbers beyond the current high levels of referrals we are currently seeing. Prevention, Early Intervention, and hospital discharge schemes are picking up the bulk of the demand increases and the forecast is for packages of care commitments to remain within the 2022/23 budget.

### **Children and Families**

- 14.9. **Special Educational Needs Assessment and Review Service (SENAR).** The Ofsted inspection in May 2021 reported that the SENAR service was extremely under resourced and unable to meet its statutory responsibilities (the caseload per officer was in the region of 600 cases, which would be considered unsafe). In February 2021, a restructure of the service was initiated, and all permanent staff placed under an S188 notice. With the Ofsted inspection and resulting commissioner appointment, this restructure was paused and remains paused pending further investigation and baselining of what the service requires to fulfil its statutory responsibilities.

There has been additional financial investment allocated for the SENAR service to address the concerns of under resourcing. For 2021/22 this was £5.1m of additional funding, and for 2022/23 £5.3m additional funding has been allocated. As the funding has currently been allocated for two years only (to fund the required staffing levels whilst the baselining exercise is undertaken), it does not allow for permanent recruitment. At present there are significant numbers of interim staff in the service covering roles from the Head of Service to support officers, and whilst this has resulted in an increase in compliance against the statutory measures, it does incur higher costs versus permanent posts.

The additional funding of £5.1m and £5.3m was based on the activity/backlogs of statutory tasks identified at that point, however further investigations have resulted in additional necessary work requiring more Appeals Officers to be appointed.

The service has now been reviewed and baselined and has undertaken extensive resource planning to ensure accurate requirements for the sustainable structure are known and additional financial resources will be requested in the upcoming Cabinet report in September 2022. This request will need to be funded from reserves in year.

- 14.10. **Home to School Transport (H2ST)**, project workstreams have been initiated to deliver better routing, contractual agreements, and data flow as well as an improved supplier invoicing system. Planning for September 2022 is advanced, with over a third of schools having submitted data and the service routing accordingly. The service has undertaken extensive resource planning and can react to late changes in requirements or new additions. A new element to the service is the introduction of Travel Support which will bring the support parts of the service together. This includes Guides (irrespective of employer), Drivers, Independent Travel Training, and the introduction of Travel Mentors.

Significant improvements are being made within H2ST, which include work that will enable accurate financial projections to be calculated from September 2022. Additional budget has been allocated to the service for 2022/23 due to significant financial pressures incurred in financial year 2021/22. However, it should be noted as per Cabinet decision of 7th June 2022 *Children and Families Directorate: Improvement Programme Update and Resources Requirement*, a significant proportion of this additional budget has been reallocated to transformation. There therefore remains a financial risk of overspend for H2ST, the value of which will not be accurately calculated until September 2022.

- 14.11. **Birmingham Children's Trust** - Placement costs continue to represent the single biggest pressure for the Trust in 2022/23 and as reported previously will require management action around review and negotiation of partner contributions as well as both demand and supply side mechanisms to mitigate the rising cost of care. The implementation of Oracle (1B) in April 2022 has impacted the ability of the Trust to produce detailed financial reports in the first quarter of the year. However, the Trust still operates CareFirst Financials for

care pay, including payments to care leavers, care providers and foster carers which is not impacted directly by the Oracle implementation. The Trust is therefore focusing on by exception and reporting on the cost of care, and a more detailed report will be provided in the next quarter as to the analysis of care costs and the management response to this.

### **Place, Prosperity, and Sustainability**

- 14.12. The main potential risk to this directorate's budget is reduced commercial property income. Further detail is contained in annex 3 of this report and we will continue to review this throughout the year.

### **City Operations**

- 14.13. There is a risk that the Highways Private Finance Initiative (PFI) alternative arrangement will cost significantly more than the current budget provision. Work is ongoing with the re procurement exercise and progress will be reported during the year to Cabinet.

### **Corporate issues**

- 14.14. There are a number of savings that were listed as corporate savings in the MTFP that have not yet been distributed to Directorates. Work is ongoing to analyse the distribution of these savings and pass them out to Directorates. Until this is done, there continues to be a risk of non-delivery in year and a possible need to use the budget smoothing reserve.
- 14.15. There are risks of an economic downturn which could affect Business Rates income. There are risks that Collection Fund Income could also be affected if collection rates are less than budgeted or if growth in Council Tax Taxbase is less than anticipated.
- 14.16. There is always a risk that the Council could suffer a cyber attack. Investment and resources put into dealing with the cyber threat, but the threat remains, and other Councils have suffered financial impacts.
- 14.17. There is a risk that short-term and long-term interest rates rise above budgeted forecast, although the Council had taken a cautious view over the medium term and will continue to keep a close review of interest rates as the year progresses.
- 14.18. As always there remains a risk of industrial disputes affecting the work force of the City Council and communications channels are in place to have an open dialogue with unions to minimise this risk wherever possible.

### **New Risks by Department**

- 14.19. As detailed earlier in this report we are continuing to live and operate in challenging financial circumstances with rising costs, increased demand for our services and reduced income. The impact of the Covid 19 pandemic is



continuing to have an impact on some sectors and we must continue to closely monitor demand and costs and put in place actions to manage the impact. Below are some of the key risks that we are potentially facing and through our well managed approach to financial management we will continue to review all risks and implement action plans to reduce them.

### **Adult Social Care**

14.20. As expected, due to the phased introduction of the new Oracle system, income from client contributions does not currently match the budgeted profile. It is anticipated that this will be resolved in July, from which point billing will return to a four weekly schedule and collection of backdated contributions will be managed through Accounts Receivable. There is a risk that some of these backdated contributions will take longer to collect and may fall into the standard debt management process for social care debtors.

14.21. The national Fair Cost of Care exercise currently being carried out with providers will likely result in us needing to increase fees. We have been allocated £3.7m of grant funding for this, but until October, when we will have set our Birmingham Fair Cost of Care and published our Market Sustainability Plan, we cannot evaluate whether this will be sufficient.

### **City Operations**

14.22. Parking income continues to be under pressure due to reduced demand and changing habits such as working from home and the success of strategies, such as the Clean Air Zone (CAZ), to encourage movement away from using cars in the city centre. The financial pressure in 2021/22 was £6.1m – indications are that this will be lower in 2022/23 but still material, early estimates are in the region of £5.4m. City Operations Management team are reworking the parking offer to ensure that it is fit for purpose and financially resilient over the medium term.

14.23. The increase in the cost of electricity is putting pressure on the street lighting budget, potentially in the region of £5.7m.

14.24. Pressures remain in the Leisure Service as external leisure providers continue their recovery to pre-covid levels, this is estimated to be achieved in the second half of the year. This results in the risk of not receiving the full management fee due and requests from the providers for additional support pre recovery. Estimates are potentially in the region of £1.5m. City Operations Management team are reviewing options to ensure financial resilience of the service over the medium term.

14.25. The increasing cost of fuel is impacting across the Directorate with early estimates in the region of £1.5m.

- 14.26. The Directorate has adopted the Budget Management Principles agreed by CLT and is working to manage these additional costs.

### **City Housing**

- 14.27. The growth in demand for Temporary Accommodation (TA) has far exceeded the reductions made through the Housing Solutions and Support prevention and supply initiatives. Already now mobilised and working are additional Case Workers for prevention, the Accommodation Finding Team working with private landlords, the Complex Case Team are working with households to provide move on options out of TA, additional Dispersed Temporary Accommodation and Oscott Gardens Homeless Centre. Despite this, due to the national economic situation, the demand for Temporary Accommodation is still growing. This will increase the use of Bed and Breakfast accommodation. There is a significant risk that the TA (including B&B) budget will be exceeded even given all the work the service is carrying out. Further opportunities to increase supply and reduce demand are being investigated.

### **Council Management**

- 14.28. The Information Technology & Digital Services (ITDS) redesign budget saving is unlikely to be fully delivered in 2022/23 due to the delays in the process of redesigning posts, completing job evaluations, consultation, and then recruitment. It is currently forecast that £1.2m of the savings will not be achieved in 2022/23. When the exact position is more certain, there is a potential to use the Budget Smoothing Reserve to fund the shortfall, as this is a timing issue. Full year savings are expected to be achieved from 2023/24 onwards.
- 14.29. Transactional Services, since the launch of Oracle this service is incurring additional overtime costs as they work through the back log created by the implementation down time of the system and the learning curve to get the organisation up to speed with the new system and processes. This is a standard part of the process of implementation of a new system. The down time was part of the planned implementation.

### **Corporate issues**

- 14.30. There is a risk that any Pay Award agreed is in excess of the budgeted provision for 2.5%. Each extra 1% is estimated to cost in the region of £4m.
- 14.31. There are also significant risks to the Council from the current inflationary pressures in the economy, including the fuel and electricity pressures referred to in the City Operations section.
- 14.32. There are risks that the cost of living crisis will increase demands from residents for council services, leading to increased costs.

- 14.33. The Council is facing challenges in recruitment and retention in a number of services. Work is under way to find solutions and we have recently launched some high profile recruitment campaigns which is hoped will make the City Council an attractive employer.
- 14.34. There is a risk that the Council is not able to fully meet the target of capitalising £20m of transformation costs through use of Flexible Use of Capital Receipts. It is early in the financial year and this will be kept under close review.
- 14.35. There is a risk that there could be another serious outbreak of Covid-19 resulting in a national or local lockdown, or that another pandemic could materialise. While these risks are not wholly within the control of the council we must continue to plan and manage the delivery of services in an efficient and effective manner.

## **15. Potential Opportunities**

- 15.1. Whilst we have the potential of risks there are also opportunities which we must maximise, and the key items are listed below. These will be reported on further as they materialise during the year.

### **Council Management**

- 15.2. **Digital Mail** – there is a potential increase in income from charges to other Local authorities.
- 15.3. There is likely to be underspend in the Corporate Programme Management Office (**CPMO**) and Chief Executive's Delivery Unit (**CDU**) areas due to staff underspends.
- 15.4. There is a potential of an extra £0.4m income per year from bringing enforcement activity in house. This will be generated through the ability to charge an administration fee per outstanding debt issued for collection. This is something that would previously have been charged by the external agent. However, this is subject to finalisation of the business case and approval to implement.

### **City Operations**

- 15.5. Work continues to mitigate pressures detailed in this report.

### **Strategy, Equalities and Partnerships (SEP)**

- 15.6. There will be a significant underspend across SEP as a result of vacant posts, which will be used to off set pressures in other Directorates.

### **Corporate**

15.7. It is expected that the on-going expenditure controls will continue to deliver savings through cost avoidance.

15.8. The Council has set aside budgets in Policy Contingency that could be used to fund all of the £5.7m electricity pressure in City Operations and £0.1m of the fuel pressure.

## **16. Savings / Income Targets**

16.1. Like previous financial years the Financial Plan for 2022/23 includes budgeted savings, these total £40.8m. There are also previously undelivered savings of £2.1m that are being monitored.

16.2. The individual forecasts for each underlying savings / income target have been RAG rated and are summarised in table 3 below.

**Table 3: Savings Risks 2022/23**

Risk Profile to delivery	£m	% of target
Delivered	2.549	6%
Low Risk	19.260	45%
Medium Risk	8.688	20%
High Risk	12.368	29%
<b>Total</b>	<b>42.865</b>	<b>100%</b>

16.3. At this stage in the financial year, this risk profile is as expected and reflects the known challenges in delivering these targets.

16.4. The table above shows that of the £42.9m savings / income to be delivered in 2022/23, £12.4m is currently rated high risk. Savings scored as high risk are not deemed as undeliverable and work is in progress to realise these targets.

16.5. The main theme that results in savings targets being scored as high risk is the delivery of transformation dispersed savings from corporate initiatives including: Automation / Debt Recovery / Traded Services / Corporate Landlord / New Ways of Working (NWoW) / Customer Services / Workforce Transition / Procurement Savings.

16.6. These transformation programmes are at risk because these are corporately driven activities to release dispersed savings across services. These targets will be re-allocated to Directorates as programme work progresses.

16.7. Tables 4-7 summarise the savings in each of the RAG rating categories.

16.8. This tracking of savings / income targets is incorporated into the Corporate Programme Management Office monthly reporting to ensure programme delivery is tracked along with the delivery of savings / income targets to provide assurance and visibility of delivery.

**Table 4: Savings that have been delivered (blue in Table 3 above)**

<b>Savings Type</b>	<b>£m</b>
Corporate Finance Savings	2.100
Adults Transformation	0.025
BAU Initiatives	(0.099)
People Services TOM	0.523
<b>Grand Total</b>	<b>2.549</b>

Note-BAU (Business as Usual) savings are shown as negative as there are some time-limited savings from previous years falling out in 2022/23.

**Table 5: Savings that are rated as low risk (green in Table 3 above)**

<b>Savings Type</b>	<b>£m</b>
1B Oracle Implementation	2.000
Corporate Finance Savings	2.036
Adults Transformation	3.332
BAU Initiatives	6.084
Corporate Landlord	0.500
Finance TOM	0.763
IT&D Service Redesign	1.200
New Ways of Working	0.495
Property Programme	2.850
<b>Grand Total</b>	<b>19.260</b>

**Table 6: Savings that are rated as medium risk (amber in Table 3 above)**

<b>Savings Type</b>	<b>£m</b>
Corporate Finance Savings	5.500
BAU Initiatives	1.324
IT&D Service Redesign	0.500
Property Programme	1.364
<b>Grand Total</b>	<b>8.688</b>

**Table 7: Savings that are rated as high risk (red in Table 3 above)**

<b>Savings Type</b>	<b>£m</b>
Automation	0.850
BAU Initiatives	1.824
Customer Servs	0.390
Debt Recovery	1.000
IT&D Service Redesign	1.200
New Ways of Working	0.800
Procurement Savings	2.704
Traded Services	1.600
Workforce Savings	2.000
<b>Grand Total</b>	<b>12.368</b>

## **List of Annexes**

- 1. Write off details**
- 2. Treasury Management Monitoring Dashboard**
- 3. Investment Property Portfolio Monitoring Dashboard**
- 4. BEIS Fund extensions**

## Annex 1 Write Offs

### 1. Housing Benefit

- 1.1 In circumstances where Housing Benefit overpayments are identified as not being recoverable, or where recovery is deemed uneconomic, the City Council's Financial Regulations and delegated powers allow for these overpayments and income to be written off. All possible avenues must be exhausted before such write offs are considered. Amounts already written off will still be pursued should those owing the Council money eventually be located or return to the city.
- 1.2 The cost to the council of writing off these irrecoverable sums will be charged to the City Council's provision set up for this purpose, which includes sums set aside in previous years to meet this need. It is, therefore, the appropriate account to be charged. There is no effect on the revenue account.
- 1.3 Cabinet is requested to approve the writing off of one separate Housing Benefit debt to the Council which is greater than £25,000 totalling £0.050m. Table 2 details the nature of the debt and the reasons for the recommendation for write off.
- 1.4 In 2022/23, from 1<sup>st</sup> April up to 30<sup>th</sup> June 2022, further items falling under this description in relation to Benefit overpayments have been written off under delegated authority. Table 1 below details the gross value of amounts written off, which members are asked to note.

**Table 1: Age Analysis of Debts written off under delegated authority**

<b>Age analysis</b>	<b>Over 6 years</b>	<b>3 to 6 years</b>	<b>Under 3 years</b>	<b>Total</b>
	£m	£m	£m	£m
Benefit Overpayments	0.057	0.033	0.071	0.160
<b>Total</b>	<b>0.057</b>	<b>0.033</b>	<b>0.071</b>	<b>0.160</b>

**Table 2: Schedule of over £25K Housing Benefit Debts recommended for write off**

Supporting Information	Total Debt Outstanding (£)
<p><b>Liability Period(s)/Account Ref Number(s):</b></p> <p><b>Housing Benefit Debt</b></p> <p>05.04.2004 – 30.10.2016</p> <p><b>Summary of debt recovery process:</b></p> <p>Service has no further means of recovery in this case and as such the remaining debt should be written off.</p>	<p><b>49,926.90</b></p>

1.5 Table 3 gives a more detailed age analysis of overpayments and income written off.

1.6 Table 4 gives detailed analysis of debt written off by range of value.



**Table 3: Summary of Debts written off under delegated authority**  
**01.4.22 – 30.6.22**

Detail	Pre 2013	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	Total	No of Debtors
Housing Benefit debts written off under delegated authority	£27,775.69	£4,504.49	£11,759.39	£8,296.64	£4,638.40	£12,489.82	£9,094.82	£11,042.68	£10,468.89	£52,158.00	£7,887.37	£160,106.19	309
<b>TOTAL</b>	£27,775.69	£4,504.49	£11,759.39	£8,296.64	£4,638.40	£12,489.82	£9,094.82	£11,042.68	£10,468.89	£52,158.00	£7,887.37	£160,106.19	309
No of debts in Age band	12	7	13	29	29	40	53	48	57	474	125	887	

**Table 4: Debts written off under delegated authority by value range:**

<b>Debt Size</b>	<b>Small</b>		<b>Medium</b>		<b>Large</b>
<b>Cases (Debtors)</b>	<b>&lt;£1,000</b>	<b>Cases (Debtors)</b>	<b>£1,001-£5,000</b>	<b>Cases (Debtors)</b>	<b>£5,000-£25,000</b>
279	£38,098.27	22	£53,636.59	8	£68,371.33

## **2. Business rates and Council Tax**

- 2.1** There has been no resource at either officer or management level to process write offs in the last quarter due to the Council Tax Energy Rebate payment scheme. This will be undertaken later in the year.

## TREASURY MANAGEMENT MONITORING DASHBOARD: 30 JUNE 2022

	value	comparator	difference
<b>1 Gross loan debt</b>	£m	£m	£m
at month end	3,035		
year end Forecast (vs Plan)	3,272	3,452	-180
year end Forecast (vs Pru Limit for loan debt)	3,272	4,126	-854

*Forecast year end debt is currently below the year end plan. The Forecast year end debt is well within the prudential limit for loan debt, set for unplanned cashflow movements.*

<b>2 short term borrowing</b>			
at month end (vs Plan)	99	563	-464
interest rate year to date on outstanding deals (vs assumption)	0.25%	1.00%	-0.75%

*Short term borrowing is significantly below the plan but expected to increase in quarter 2, with no further Covid grants expected. Bank rate has seen consecutive rises so future borrowing is likely to be above the planned rate.*

<b>3 Treasury investments</b>			
at month end (vs Plan)	61	40	21
interest rate year to date on outstanding deals (vs assumption)	1.04%	0.75%	0.29%

*Treasury investments are currently much lower than the previous year with no further Covid grants received in advance expected.*

<b>4 Long term loans taken</b>			
year to date (vs Plan)	-	90	-90
ave. interest rate obtained (vs assumption)	-	2.35%	-2.35%

*Any long term loans taken during the year are likely to be at a higher rate than planned due to rise in gilt yields on the back of successive Bank Rate increases by the Bank of England.*

<b>5 Assurance</b>	
were Credit criteria complied with?	yes
were investment defaults avoided?	yes
was the TM Code complied with?	yes
were prudential limits complied with?	yes

*These are key performance indicators for treasury management which in normal circumstances should all be yes. Investment quality is kept under continual review with support from the Council's treasury advisers.*

<b>Treasury Management: portfolio overview</b>			
<i>This appendix summarises the Council's loan debt and treasury management investments outstanding</i>			
	this quarter		last quarter
	30/06/2022		31/03/2022
	£m		£m
PWLB	2,489.2		2,489.2
Bonds	373.0		373.0
LOBOs	71.1		71.1
Other long term	2.5		37.5
Salix	0.3		0.4
Short term	98.9		136.6
<b>Gross loan debt</b>	<b>3,035.0</b>		<b>3,107.8</b>
less treasury investments	(61.2)		(146.3)
<b>Net loan debt</b>	<b>2,973.8</b>		<b>2,961.5</b>
Budgeted year end net debt	3,496.6		3,681.8
Prudential limit (gross loan debt)	4,126.0		4,102.7

Treasury investments are lower than the previous month as central government grants for Covid and energy relief are utilised.

<b>Treasury investments by source</b>	<b>£m</b>
UK Government	0
Money Market Funds	50
Banks and Building Societies	11
	<b>61</b>

<b>Treasury investments by credit quality</b>	<b>£m</b>
AAA	0
AAAmmf	50
AA	11
A	0
	<b>61</b>

In line with the Strategy, the Council holds its treasury investments in diversified liquid funds of high credit quality.

#### Investments as Accountable Body

These are investments made as Accountable Body on behalf of on behalf of others, and are not the Council's own money.

	Getting Building Fund	Growing Places Fund	AMSCI	Regional Growth Fund	GBSLEP Fund	LGF3	LGF4	NMCL	Total
	£m	£m	£m	£m	£m	£m	£m	£m	£m
UK Government	0.0	0.0	30.0	0.0	0.0	0.0	0.0	0.0	30.0
Birmingham City Council <sup>1</sup>	0.0	0.0	0.0	0.0	2.2	0.0	0.0	0.0	2.2
Money Market Funds	2.9	7.3	13.0	11.4	0.0	0.2	1.9	3.2	39.9
	<b>2.9</b>	<b>7.3</b>	<b>43.0</b>	<b>11.4</b>	<b>2.2</b>	<b>0.2</b>	<b>1.9</b>	<b>3.2</b>	<b>72.1</b>

<sup>1</sup> These funds have been lent to the Council by agreement at a commercial rate

## Annex 2.3

### Treasury management: summary of delegated decisions in the quarter

*This appendix summarises decisions taken under treasury management delegations to the Chief Finance Officer during the quarter.*

1. Short term (less than 1 year)	borrowing		investments
	£m		£m
opening balance	137		-146
new loans/investments	87		-1045
loans/investments repaid	-125		1130
closing balance	99		-61

*These loans and investments are for short periods from one day up to 365 days. Short term loans have decreased as loans have been repaid upon maturity.*

2. Long term borrowing:				
date	lender	£m	rate	maturity

*No long term loans taken to date*

3. Long term loans prematurely repaid:				
date	lender	£m	rate	maturity

*No long term loans were prematurely repaid.*

*In line with treasury management practices, the Council will repay long term loans prematurely if this provides a financial saving to the Council.*

4. Long term treasury investments made:				
date	borrower	£m	rate	maturity

*No long term investments were made. The Council is a substantial net borrower and usually has cash to invest for relatively short periods.*

## INVESTMENT PROPERTY PORTFOLIO MONITORING DASHBOARD: QUARTER 1 2022/23

**1 Portfolio objectives**

The Portfolio is comprised of non-operational service properties which were historically held to earn a financial return.

**2 Portfolio summary**

	£m	budget £m	forecast £m	variance
Direct property		-22.63	-23.08	-0.45
Loans on property				
less portfolio prudential borrowing		3.39	3.15	-0.24
less management costs		2.60	2.60	0.00
net total		-16.64	-17.34	-0.69

**3 Limit on borrowing for Investment property portfolio**

	value £m	limit £m	variance £m
prudential borrowing from 1 April 2019	0.00	50.00	50.00
borrowing repaid from sale proceeds	-16.88	-21.17	-4.29
	-16.88	28.83	45.71

**4 Portfolio completions in the quarter (acquisitions and disposals)**

	£m
Sales completed to quarter 3	
Sales	5.73
Purchase	21.17

## Commentary:

Acquisitions of 69-73 The Parade, Sutton Coldfield; 319 Shady Lane and 30 Granby Avenue completed in June 2022.  
Disposal of 373 Garratts Green, Land at Belgrave Middleway and Midlands Art Centre (Cannon Hill Park).

**5 Planned activity in the coming quarter**

Acquisition of 9 Colmore Row approved by Cabinet on 28th June 2022.  
Terms agreed on property disposals including Wellington Wharf (units 1-3) and Boulton Road Service Station.

**6 Assurance**

was the CIPFA Treasury Code complied with? yes

was the Council's Service and Commercial investment Strategy complied with? yes

*(the Strategy implements the requirements of the Government Investment Guidance)*

was the Council's Investment Property Strategy complied with? yes

## commentary:

All properties fully evaluated and disposed with in the appropriate manner.

## **Annex 4**

### **Background**

#### **BEIS Fund Extensions and Amendments – approved under delegated authority 29 March 2022**

**Advanced Manufacturing Supply Chain Initiative – AMSCI.** These funds were awarded by Government from Regional Growth Funds (RGF) and will now continue to be available for grants or loans across England. It is a competitive fund that provides subsidies (grants) or loans (or a combination) for capital investment, research and development expenditure and training for industrial projects involving collaborations across the supply chains (including reshoring to the UK). The council has been the accountable body of the AMSCI programme, managed by FB since 2012.

The remaining funds and loan receipts will now be recycled rather than repaid to BEIS and the new fund is expected over time to be in the region of £60m (after allowing for non-performance and bad debts). The new consolidated fund will be available to organisations across England.

**Regional Growth Fund.** Awarded to FDC by BEIS these comprise a Mezzanine & Debt Fund and a Tooling Fund totalling £28m, awarded in 2014 under accountable body arrangements. These are live funds that BEIS proposed extending the application geography to the whole of the Midlands rather than the West Midlands.

**National Manufacturing Competitive Levels – NMCL** funds support the automotive, aerospace, defence, security and space sectors in the provision of improvement activities in the supply chain through training, coaching and mentoring. It is a national (England) fund. A grant of £26m was awarded to FDC under BCC accountable body arrangements by Cabinet on 16 April 2019. This grant is managed by FB but delivered by ADS (leading trade organisation for the Aerospace, Defence, Security and Space sectors) and SMMT (Society of Motor Manufacturers and Traders). In consultation with these bodies and FDC, BEIS has reduced the budget of the programme against the allocations made in 2019. The revised total budget for 21/22 is £6.7m and for 22/23 is £0.13m, a reduction of £5.6m. All parties have taken a constructive approach to the reduction and accept the change, reflective of uptake, and as accountable body, BCC is required to confirm this position with BEIS.

### **Financial Implications**

There are no direct financial implications for the council. The funding is held by the Council as accountable body and the Council will continue to recharge its transactional and management costs into the fund (subject to BEIS approval of any management fee ceiling). FB/FDC will charge an approved management fee to the fund. Further details are available within the delegated report of 29 March 2022.





# Birmingham City Council

## Report to Cabinet

26<sup>th</sup> July 2022



**Subject:** **DRAFT CORPORATE PLAN 2022-2026**

**Report of:** Richard Brooks - Director of Strategy, Equality & Partnerships  
Rebecca Hellard - Director of Council Management

**Relevant Cabinet Member:** Councillor Ian Ward – Leader

**Relevant O &S Chair(s):** Councillor Albert Bore – Co-ordinating O&S Committee

**Report author:** Paul Clarke – Assistant Director (Programmes, Performance, and Improvement)

Are specific wards affected?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No – All wards affected
If yes, name(s) of ward(s):		
Is this a key decision?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No
If relevant, add Forward Plan Reference: 009748/2022		
Is the decision eligible for call-in?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No
Does the report contain confidential or exempt information?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
If relevant, provide exempt information paragraph number or reason if confidential:		

### 1 Executive Summary

- 1.1 This report seeks Cabinet consideration of the organisation's draft Corporate Plan 2022-2026. The Plan updates the current Council Plan 2018-22 and brings together elements from other documents to provide a cohesive and coherent framework for the council's business planning for 2022-2026.

### 2 Recommendations

- 2.1 Cabinet are asked to:

- Consider the draft Corporate Plan 2022-2026 as the overarching plan for the Council's medium-term planning framework which will provide the context for detailed business planning, programme development and transformation activity by directorates and their services.
- Recommend the draft Corporate Plan 2022-2026 for full council approval.
- Note that a Delivery and Performance Plan will be developed including key activity, milestones, and performance measures for each of the Corporate Plan priorities.

### **3 Background**

3.1 Currently there are several key documents that provide the framework and context for the Council's strategic planning and delivery:

- Council Plan 2018-22: published in June 2018 and updated in July 2019, the Plan sets out the six strategic outcomes (e.g. *Birmingham is an entrepreneurial city to learn, work and invest in*) the Council is aiming for through its delivery, enabling and influencing roles. The Plan articulates 28 priority aims that will help achieve the outcomes. (e.g. *We will create opportunities for local people to develop skills and make the best of economic growth.*)
- Delivery Plan 2020-2022: published in November 2020, the Plan consists of an overarching narrative regarding the Council's strategic context and direction; a detailed set of tasks, activities and milestones and performance indicators to measure progress against our key goals and outcomes. It also set out the next steps in the council's improvement journey, including the key opportunities for working differently in the context of increasing demand for vital services; changes to citizens' needs; diminishing resources; the ongoing climate emergency; and an uncertain national political picture.
- Investing in Our Future - What Birmingham City Council needs to do next: 2021 to 2026: A report to Cabinet in January 2021 setting out key next steps in the council's improvement including a proposed direction of travel for the leadership, design and organisation of the council, and establishing the 'pillars' for transformation.

### **4 A new Corporate Plan for 2022-2026**

4.1 The draft Corporate Plan 2022-26 provides a new and more cohesive framework for the organisation's business and financial planning by bringing these elements together into one document. The Plan provides a summary of:

- The strategic context the council is operating in - including six 'grand challenges' the city is facing
- The strategic priorities of the council - so that resources, delivery plans, strategies and operational activity can be aligned to them

- How the council will continue to transform and drive improvement in services to deliver and operate as an organisation and partner in the most effective, productive, and impactful way
- 4.2 Council Plan priorities have been reviewed and updated to reflect the context we are now operating in and reflect the political priorities of the administration - including addressing the impact of the Covid-19 pandemic, tackling inequalities, and the 'levelling up' of the city. Outcomes and priorities are presented using the 'Be Bold, Be Birmingham' brand. This brand goes beyond communicating the city's narrative on the aspirations and benefits of hosting the Commonwealth Games and encapsulates the council's statement of intent to be bold, ambitious, proud.
- 4.3 Tackling inequalities is at the heart of the Plan, underpinned by the vision to make Birmingham *a city where all citizens share in the creation and benefits of sustainable economic growth and live longer, healthier, and happier lives*. The Plan sets out the intention to work with our partners to build a Bolder, Brighter Birmingham that is:
- **Prosperous:** through a focus on inclusive economic growth, tackling unemployment, attracting inward investment, and maximising the benefits of the Commonwealth Games.
  - **Inclusive:** through a focus on tackling poverty and inequality, empowering citizens, promoting diversity and civic pride, and supporting and enabling all children and young people to thrive.
  - **Safe:** through a focus on making the city safer, safeguarding vulnerable citizens, increasing affordable housing, and tackling homelessness.
  - **Healthy:** through a focus on tackling health inequalities, encouraging physical activity and healthy living, supporting mental health, and improving outcomes for adults with disabilities and older people.
  - **Green:** through a focus on street cleanliness, improving air quality, continuing the route to net zero, and becoming a city of nature.
- 4.4 The Plan also conveys our ambition to be a 'best-in-class' organisation. It re-iterates a commitment to continue to drive improvement and modernisation across our organisation so that we can deliver our priorities in the most effective, efficient, and productive way by:
- Transforming how we operate and deliver as one organisation
  - Embedding our organisational values and behaviours into everything we do
  - Ensuring a balanced and sustainable medium-term financial plan
  - Promoting, championing and advocating diversity in everything we do
- 4.5 The Plan will be reviewed annually and updated to reflect changes in strategic context and political priorities - just as the current Council Plan was updated in July 2019 to add an outcome and priorities focused on the climate emergency, and amended other priorities to put more emphasis on tackling inequalities.

- 4.6 A Delivery and Performance Plan will be developed setting out key performance measures and delivery milestones. This will be used to monitor progress and impact against the Corporate Plan, and form part of the council's corporate performance reporting arrangements.
- 4.7 Activity to deliver the Corporate Plan priorities will include current 'business as usual' activity being progressed through existing delivery plans, strategies, and transformation activity, planned new work and new activity to be developed. We will undertake an annual review each year to take stock of delivery and progress against the Corporate Plan priorities and incorporate this into our performance reports to Cabinet.

## **5 Options considered and Recommended Proposal**

- 5.1 Do nothing - the Corporate Plan is at the heart of the planning framework. It articulates the Council's vision, objectives, and priorities, and how we are transforming and modernising as an organisation to best deliver those objectives, setting the direction for service planning and individual objectives. Doing nothing is therefore not an option.
- 5.2 Recommend approval of the new Corporate Plan – which provides a cohesive and coherent framework for the council's business planning and continued transformation activity for 2022-2026.

## **6 Consultation and engagement**

- 6.1 The Plan has been informed and shaped through engagement with Corporate Leadership Team, Directorate Management Teams, and Cabinet Members. The summary of opportunities and 'grand challenges' facing the city have been developed with key partners through our City Board and were included in the Medium-Term Financial Plan agreed by Cabinet and Full Council in February, along with the main themes of the draft Corporate Plan (Prosperous, Inclusive, Safe, Healthy and Green). These elements were also discussed with Overview and Scrutiny Committees during June as part of informal work programme sessions, along with directorate priorities and activity agreed through business planning undertaken using the framework of the draft Corporate Plan priorities.
- 6.2 An engagement plan and communication materials are being developed to support communication of the Plan to staff and external stakeholders.

## **7 Risk Management**

- 7.1 The Council has an established approach to risk management which is set out in the Strategic Risk Register. Strategic and operational risks will be reviewed in light of this report.

## **8 Compliance Issues:**

- 8.1 **How are the recommended decisions consistent with the City Council's priorities, plans and strategies?**

8.1.1 The Corporate Plan 2022-2026 provides a refreshed statement of outcomes and key priorities to be used to develop the Council's policies, plans and strategies.

## **8.2 Legal Implications**

8.2.1 There are no direct legal implications arising from this report. The Corporate Plan is not a statutory document or delivery plan.

## **8.3 Financial Implications**

8.3.1 There are no direct financial implications arising from this report although the Corporate Plan 2022-2026 will provide a framework and context for resource allocation and spending decisions made in the future. The Corporate Plan is aligned with the Medium-Term Financial Plan, and together provide the framework for the council's business planning for 2022-2026, informing budget and resource deployment decisions.

## **8.4 Procurement Implications (if required)**

8.4.1 There are no direct procurement implications arising from this report.

## **8.5 Human Resources Implications (if required)**

8.5.1 There are no direct Human Resources Implications arising from this report.

## **8.6 Public Sector Equality Duty**

8.6.1 The draft Corporate Plan 2022-26 commits the Council to act to address the many challenges the city of Birmingham faces, such as higher than average levels of employment, homelessness, and child poverty. The analysis of these challenges and opportunities plots how issues need to be addressed at several stages of citizens' lives and the priorities in the draft Plan reflect this.

# **9 Background Documents**

Appendices:

- Appendix 1: Draft Corporate Plan 2022-2026
- Appendix 2: Equality Impact Assessment

Background papers:

- 9.1 Report to Cabinet 19 January 2021: Investing in our Future: What Birmingham City Council needs to do next: 2021 to 2026
- 9.2 Report to Cabinet 10 November 2020: Birmingham City Council Delivery Plan
- 9.3 Report to Cabinet 25 June 2019: Refresh of the Council Plan 2018-2022
- 9.4 Council Plan 2018-2022





**DRAFT** **CORPORATE  
PLAN**

**2022-2026**

**TO SUPPORT, TO SERVE, TO LEVEL UP**

# CONTENTS

## Foreword

## Purpose and Introduction

### The context for the Plan: opportunities and challenges

- A city of opportunity and potential
- The 'grand challenges' facing the city

### Our response: what we want to deliver, enable and influence

- Our vision for the city
- Levelling up Birmingham
- Commonwealth Games legacy
- Working with partners and citizens
- Our strategic outcomes and priorities:
  - A Bold Prosperous Birmingham
  - A Bold Inclusive Birmingham
  - A Bold Safe Birmingham
  - A Bold Healthy Birmingham
  - A Bold Green Birmingham

### Our response: becoming a best-in-class council

- Transforming how we operate and deliver
- Ensuring a balanced and sustainable medium-term financial plan
- Embedding our organisational values and behaviours
- Promoting, championing and advocating diversity





# FOREWORD

by the Leader of the Council and the Chief Executive



**Cllr Ian Ward**  
Leader of the Council



**Deborah Cadman OBE**  
Chief Executive

**We are delighted to introduce our Corporate Plan for 2022-2026, which sets out our strategic priorities and the outcomes we are aiming to deliver, enable and influence as a council. The Plan also states our ambition to transform the council, so we can serve the city and its citizens in the most effective way.**

Birmingham and its citizens face significant opportunities and challenges and the council must be bold, ambitious, and confident: Bold in its aspiration, ambitious in setting its priorities, and confident in its ability to delivering them. This Plan provides a common basis for our strategic planning and a focus on tackling inequalities and creating opportunities for citizens to live longer, healthier, and happier lives.

This is a golden decade of opportunity for the people and communities of Birmingham. The years ahead, framed by the Commonwealth Games in

the summer of 2022 and the arrival of HS2 around a decade later have the potential to be a period of unparalleled success for Birmingham. We are a young and diverse city, connected into the global economy and cultures, bursting with creativity and invention and bold enough to grasp the opportunities ahead. We are uniquely placed to prosper in the modern, green economy now being created.

To do that we must respond to the grand challenges facing the city. The COVID crisis has highlighted the deep-seated inequalities that exist between places and communities across our city, and between Birmingham and the rest of the country. We need to be honest about the levels of unemployment, the health inequalities, the extent of the climate emergency, opportunities for young people, and the need to further build community resilience and tackle crime. We must be bold and ambitious about our role in addressing them.



Our response needs to be rooted in our belief in the potential of all Birmingham people and our commitment to empower communities to build our future together. We need to strive for prosperity and opportunity for all in order to level up the city. What we deliver for Birmingham must be informed by the people of Birmingham, so we will increasingly draw on data and insight, along with citizen feedback and lived experience, so that we deliver what we know our citizens need.

We will need to connect with communities in a meaningful way, placing them at the heart of our decision making and empowering them to flourish and succeed. This will require strong partnerships and collaboration to deliver better outcomes, which means working as one organisation, being confident about our asks of partners, and clear about our own contribution.

Our citizens, businesses and partners deserve the best, and we should be relentless in our drive for excellence. We need to live and breathe

our organisational values. Our three principles of transformation should guide how we design and deliver our services, so that we embed early intervention into everything we do, ensure the growth coming to the city benefits our residents and we build an organisation with the capacity and capability to deliver best in class services for all our citizens. We need to be bold in our thinking and actively look to learn from others. We should be honest, not defensive, about things we need to improve.

The opportunities and challenges facing the city and council are the reasons why we need this Plan. A Plan that sets out what we want to accomplish through our service delivery, enabling and influencing roles, and how as an organisation we will operate and behave to help achieve a prosperous, inclusive, healthy, safe and green city.

**Cllr Ian Ward**  
Leader of the Council

**Deborah Cadman OBE**  
Chief Executive

## THE PURPOSE OF THIS PLAN

This Plan sets Birmingham City Council's vision and priorities for 2022-2026 so that employees, councillors, delivery partners and other stakeholders understand:

- The strategic context the council is operating in - including the 'grand challenges' the city needs to respond to and opportunities we need to build on
- The strategic priorities of the council - so that resources, delivery plans, strategies and operational activity can be aligned to them
- How the council will continue to transform and drive improvement in services to deliver our priorities and operate as an organisation and partner in the most effective, productive, and impactful way

The Plan replaces the Council Plan 2018-22 and presents a refreshed set of priorities for 2022-2026 that reflect the context we are now operating in, addressing the impact of the COVID-19 pandemic, tackling inequality and supporting the 'levelling up' of the city.

## INTRODUCTION

This plan brings together the main elements of our mission as a council to:

- **Support:** Our mission is to support, enable and encourage our citizens to fulfil their true potential by breaking down barriers and tackling inequalities; to support our citizens to have a voice and to be heard; to support our communities to improve the areas in which they live and shape the world around them.
- **Serve:** Our mission is to provide best-in-class public services, by striving for continuous improvement, being innovative and working in partnership to meet the needs of our citizens and our communities.
- **Level Up:** Our mission is to create a fairer, stronger city where all citizens share in the creation and benefits of more sustainable economic growth, where our citizens live longer, healthier and happier lives.

### SUPPORTING STRATEGIES AND PLANS

This Plan and the priorities in it are supported by a range of strategies and programmes (both current and new) which set out how and what the Council will deliver, including:

- Delivery strategies and policies – strategies (some of which are statutory plans) that set out detailed actions and outputs which will help deliver priorities, for example Route to Zero Plan, Economic Recovery Strategy, Our Future City Plan, Birmingham Transport Plan, Homelessness Prevention Strategy, and many more.
- Place-based strategies - for priority areas such as the East Birmingham Inclusive Growth Strategy, the Perry Barr Masterplan and Birmingham Curzon HS2: Masterplan for growth.

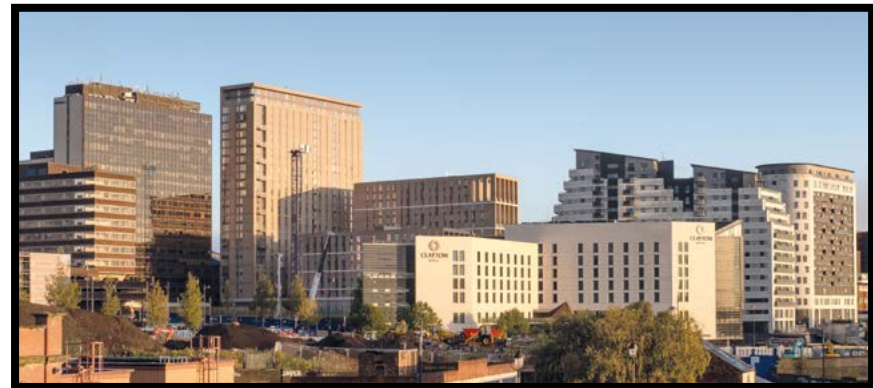
There are also plans and programmes which support and enable the council to deliver priorities in an effective, efficient, and productive way - including:

- The Budget and Medium-Term Financial Plan: sets out how the council's financial resources will be deployed. The Budget outlines the council's financial income and

expenditure for 2022/23 and the Medium-Term Financial Plan sets out how the council intends to deploy its financial resources to 2025/26.

- Plans to improve the council's effectiveness and modernise its ways of working, for example through its Workforce Strategy, ICT & Digital Strategy, Transformation Programme and Everyone's Battle, Everyone's Business (the action plan to address inequalities within our organisation and through our civic leadership).

A Delivery and Performance Plan will outline the key actions, activity and metrics that support the delivery of the Corporate Plan priorities.



# The context for this plan

## A CITY OF OPPORTUNITY AND POTENTIAL

Birmingham is a city with enormous opportunity and boundless potential. It is one of the most ethnically and culturally diverse cities outside London, which brings with it a wealth of creativity, talent, entrepreneurship, and energy. We are one of the youngest cities in Europe and nearly half of our citizen population are under 30 years of age and represent a bright future for the city and for the region.

The city's economic fundamentals are strong and diverse with bases in advanced manufacturing, financial services, and technology, set within the wider West Midlands economy. This is supported by the investments we are making in our city's infrastructure, and the completion of the Midlands Metro expansion and arrival of HS2 will provide greater connectivity to, from and within the city.

Through the Commonwealth Games in 2022, the city is hosting one of the largest multi-sports event in the world, with a million visitors and more than 1 billion people watching us from around the world. The stage is set for us to bring forward a golden decade for the city.

## THE 'GRAND CHALLENGES' FACING THE CITY

To fully grasp and exploit these opportunities we must understand, acknowledge, and address some major challenges facing the city. From climate change to historic inequalities, from helping our young people thrive to enabling our citizens to live well into old age, our path to prosperity requires us to respond to these. More than 1 in 9 of our working age people have no qualifications. 4 in 10 children are living in relative low-income families, and too many children die before they reach their first birthday. Health inequalities remain stark and unemployment rates in the city are higher than the national average.

Through this Corporate Plan we are restating our commitment to tackling inequalities, ensuring it is at the heart of our mission and the thread that runs through everything the council does as it plays its role in responding to six 'grand challenges' facing the city:

## **1. EQUALITY AND INCLUSION**

Many of the challenges facing the city and its citizens stem from historic and structural inequalities within our society and economy, and the COVID-19 pandemic has exposed and compounded the difficulties our most vulnerable citizens face in their daily lives. The rising cost of living has added further pressures. For too many of our citizens the opportunities in the city are out of reach. This holds people back from reaching their full potential, and often pushes people to seek help from us and our partners, increasing pressure on the cost and provision of public services.

## **2. UNEMPLOYMENT, SKILLS, AND THE LOCAL ECONOMY**

The COVID-19 pandemic and the resulting closure of businesses and reduction in trade and revenue has had a damaging impact on the Birmingham economy, setting back the impressive economic growth we have seen in recent years. Jobs have been lost, unemployment rates are high, we have below national average levels of skills, and too many people have low rates of pay. This affects the quality of life, health, and pressure for affordable housing.

## **3. HEALTH AND WELLBEING**

Health inequalities in Birmingham remain stark and have been made worse by the COVID-19 pandemic. Low life expectancy and chronic conditions such as diabetes afflict our poorest communities far worse than those living in more affluent circumstances. Birmingham also has a high rate of limiting, long-standing and chronic illness which starts earlier in life and means more people risk being excluded earlier from opportunity and living healthy lives. We must prevent ill health and maximise health and wellbeing for everyone in Birmingham through safe and secure homes and shaping a healthier environment for citizens that enables them to achieve their potential and aspirations at every age.

#### 4. COMMUNITY RESILIENCE, COHESION AND LIVING STANDARDS

Birmingham has long been a vibrant and diverse place that is a proud home to a diverse mix of people of all ages, ethnicities, faiths, and lifestyles. But, there is a need to further strengthen resilience and cohesion within our communities given the inequalities that have been intensified by the pandemic, the inequalities given focus through the Black Lives Matter and #MeToo movements, and the serious issue of engrained violent crime. Our citizens have weathered the hardships of the pandemic and we must now work with them to help to build resilience and opportunities, celebrate and strengthen local communities so all people in the city can thrive in Birmingham's future.

#### 5. CLIMATE EMERGENCY

The climate crisis has never been more urgent for our city, nation, and humanity. The United Nations' Intergovernmental Panel on Climate Change (IPCC) lays bare the state of Earth's climate and nature emergency and the need for us to take action to address it. We have embraced our responsibilities to the climate, with the council declaring a Climate Emergency, establishing a Route to Zero taskforce, drawing up a plan to be a City of Nature and launching a Clean Air Zone. Leadership and drive are required to achieve our climate goals, going beyond them where possible, and linking to work on transitioning our economy to become fairer and to grow sustainably.

#### 6. OPPORTUNITIES FOR CHILDREN AND YOUNG PEOPLE

Our young people are one of our greatest strengths and represent a bright future for Birmingham. But the pandemic has been particularly tough on them, and we need to help build a bright future for them. Too many of our children and young people do not get a good start in life, with nearly 40% of children living in relative poverty. They need to prosper, and for many their prospects have been damaged by the COVID-19 pandemic. Lots of our young people are unemployed and struggling to find work and disparities between attainment of pupils in the state and independent sectors has worsened.



# Our response: What we want to deliver, enable and influence

We understand the opportunities and 'grand challenges' facing the city. We know it is our mission to respond to them. We will Be Bold in our ambitions. And we will Be Bold in how as a council we will continue to support, enable and empower the city and its citizens and businesses to reach their potential.

## OUR VISION FOR THE CITY

Through the council's delivery, enabling and influencing roles, we will play our part in strengthening Birmingham's position as a thriving, young and diverse global city, as the beating heart of the UK both commercially and culturally; a place where everyone is included in the opportunities that the city can offer; a place where we can celebrate our heritage with a sense of pride and also look forward with a sense of optimism to a golden decade of shared opportunity in a Bolder, Better Birmingham.

Tackling inequalities is at the heart of our mission and at the centre of everything we do.

We will help make Birmingham **a city where all citizens share in the creation and benefits of sustainable economic growth and can live longer, healthier, and happier lives.**

## LEVELLING UP BIRMINGHAM

Our Prosperity and Opportunity for All Strategy sets out a clear ambition to tackle the long-standing and deep-rooted structural inequalities. It sets out what is required to 'level up' the city so all citizens regardless of background, and especially those with the most disadvantage, have the opportunities and capability to access, shape and benefit from a good education, skills needed for career progression, fulfilling and well-paid jobs, affordable housing, effective public services, well-connected physical and digital infrastructure; and a high-quality living environment, rich in culture, amenities and green open spaces.

Birmingham is already levelling up, bringing forward major development programmes, harnessing unique opportunities such as HS2 and the Commonwealth Games, embedding community wealth building and inclusive growth to retain wealth locally, and taking a labour market approach to raise skills and pay and connect people to opportunities.

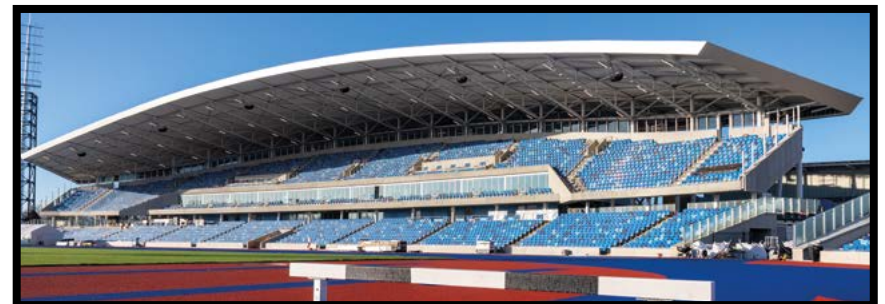


For a step-change and acceleration above and beyond what we can do currently, we are seeking Government and partner involvement in the support, development and implementation of five 'levelling up accelerators':

1. A long-term, single pot funding and further devolved powers, giving us the ability to address issues in our city at scale and pace
2. An integrated local place delivery through the East Birmingham Inclusive Growth Strategy, covering 250,000 people to tackle deep levels of deprivation
3. Embedding our early intervention and prevention model to assist the most disadvantaged citizens and move from dealing with crises to co-designed support and services to stop these arising
4. A green and digital infrastructure including a comprehensive green, reliable, frequent, and affordable transport network
5. A housing retrofit programme across the cities of Birmingham, Coventry, and Wolverhampton to tackle carbon emissions and create jobs in areas that need it most

## **COMMONWEALTH GAMES: DELIVERING A BOLD LEGACY FOR BIRMINGHAM**

The council is playing a central role in ensuring all residents and communities can embrace the Games and realise its long-term benefits. Birmingham's legacy will be realised through both physical assets (including new facilities, enhanced infrastructure, and more sustainable public spaces) and community, social and economic opportunities (including increased access to apprenticeships and volunteering roles). The Birmingham City Council Legacy Plan (Delivering a Bold Legacy for Birmingham) provides a strategy and detailed plan to capture these benefits while supporting the council's response to the grand challenges set out in this Corporate Plan.



## **WORKING WITH PARTNERS AND CITIZENS**

We can only achieve these ambitions through working in partnerships with citizens, communities, delivery, and strategic partners. Responding to the challenges impacts on all of us as citizens and stakeholders in our city and we all have a part to play in addressing them. Our partnerships are valuable and we are committed to build on the learning from the last two years responding to the COVID-19 pandemic and the journey towards the Commonwealth Games to deepen these relationships and demonstrate as a city we are much more than the sum of our parts.

We will continue to work with our diverse partnerships including the community and voluntary sector, faith and cultural sectors, academic and commercial sectors, NHS, police, regional partners (including the West Midlands Combined Authority) and many others.



## STRATEGIC PRIORITIES AND OUTCOMES

We will focus our transformation, delivery, enabling and influencing activity as one council to **Be Bold** and respond to the city's challenges and opportunities to achieve:

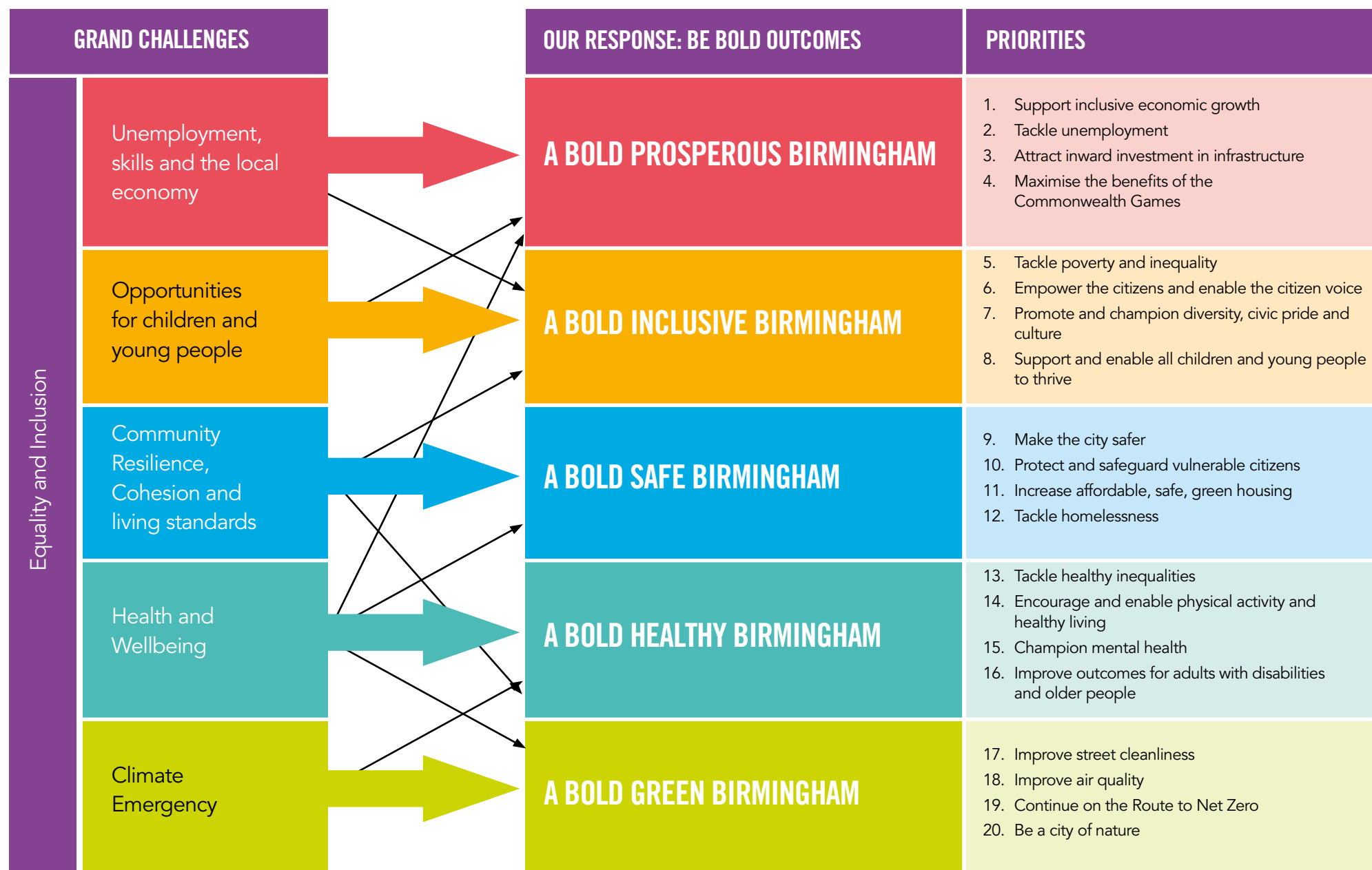
- **A Bold Prosperous Birmingham**
- **A Bold Inclusive Birmingham**
- **A Bold Safe Birmingham**
- **A Bold Healthy Birmingham**
- **A Bold Green Birmingham**

The following pages set out the council's priorities to achieve that. They reflect the context we are now operating in, addressing the impact of the COVID-19 pandemic, tackling inequality, and supporting the 'levelling up' of the city.

The ambitions in this Plan are interconnected. A more prosperous, inclusive, safer, healthier, and greener city are all critical to building a better Birmingham. Many of the priorities and the outcomes sought from them are dependent on one another.

For example, we know well-paid employment, affordable homes and transport, clean air and access to green spaces can all contribute to good physical and mental health.





# PRIORITIES





# A BOLD PROSPEROUS BIRMINGHAM

## AMBITION:

Birmingham will be a city where everyone has an opportunity to prosper from its economic growth and development. Working with residents, schools, communities, and businesses, we will help them to succeed and thrive with bold opportunities through employment and skills programmes, education, transformative regeneration, and economic recovery packages. We will continue to build a bolder prosperous Birmingham in a golden decade of opportunity starting with the Commonwealth Games 2022 and supported through the arrival of HS2 and major development and regeneration including at Smithfield, Perry Barr and East Birmingham.

Outcomes for the city and citizens:

- Economic recovery and inclusive growth
- More citizens in employment
- Higher rates of pay
- Increase in skill levels and qualifications
- Major regeneration projects and infrastructure across the city
- Economic benefits and legacy from the Commonwealth Games

# PRIORITIES

## **#1 Support inclusive economic growth:**

We will work with businesses, colleges and universities, anchor institutions, community sector and unions to accelerate a stronger, fairer, inclusive and greener city economy building on our strengths and diversifying further, increasing investment, supporting business growth, build and retain wealth locally, and help bring back and create more and better paid jobs.

## **#2 Tackle unemployment:**

We will seek to tackle and reduce barriers to employment, working with a range of partners to increase access to better paid jobs, expand the number and availability of apprenticeships, and increase qualifications and skill levels to enable all citizens, including young people and people with disabilities, to get the opportunities ahead especially those in the most disadvantaged circumstances.

## **#3 Attract inward investment and infrastructure:**

We will continue to work with the West Midlands Combined Authority (WMCA), West Midlands Growth Company, businesses and other stakeholders to develop the infrastructure needed to power our city for the 21st century – so we are a city with a modern green, accessible, transport system, universal gigabit connectivity and 5G for citizens and businesses, green and clean energy. We will continue to harness our land and assets to support and attract businesses to our city.

## **#4 Maximise the benefits of the Commonwealth Games:**

We will continue to exploit the employment opportunities and other benefits of hosting the Games for Birmingham's economy, businesses and citizens, including the implementation of the 'Delivering a Bold Legacy for Birmingham' Plan and bids for further major events in the city.



## A BOLD **INCLUSIVE** BIRMINGHAM

### AMBITION:

Birmingham will be a thriving, happy and connected place where everyone is included in the opportunities that the city can offer. Building on partnerships old and new whilst sustaining community involvement we will become a city that benefits from strengthened connections between communities, increased fairness, and reduced inequalities. We will be an age, disability and child friendly city that tackles poverty and exclusion. We will be a city where our citizens experience accessible public services and have a say in how Birmingham is run. We will work with and help citizens so that in their homes, schools, and communities they feel better connected, included, and empowered to be active in influencing the decisions that affect their lives.

Outcomes for the city and citizens:

- More residents who play an active role in civic society
- Reduced levels of inequality
- Fewer children living in poverty
- Cultural opportunities flowing from the Commonwealth Games
- Higher levels of educational attainment for children
- Higher levels of access to childcare and early years services
- Improved quality of life for children and young people
- More young people in education, employment, or training



# PRIORITIES

## #5 Tackle poverty and inequalities:

We will work with partners and citizens to address food, fuel, and pay poverty, and tackle digital exclusion. We will ensure our own workforce better reflects the diversity of our city. We will work with partners across all sectors to break down the barriers to opportunity for all citizens in the city, including people with disabilities, limiting longstanding illness and those from the most excluded communities.

## #6 Empower citizens and enable the citizen voice:

We will continue to work closely with communities and to strengthen the community voice and develop active and empowered citizenship so citizens can have local influence and involvement in how their area is run and enable great places to live, where people know and look out for each other, strengthening connectivity and cohesion.

## #7 Promote and champion diversity, civic pride and culture:

We will build on the benefits of hosting the Commonwealth Games in a way that builds cohesion, inclusion, and civic pride and uses the Games as a turning point in uniting the city's population and tackling inequalities. We will take new approaches to factor culture into major developments and regeneration.

## #8 Support and enable all children and young people to thrive:

We will support all children and young people to have the best start in life and achieve their full potential. We will work with early years services and schools to improve access and quality and improve educational attainment. We will continue our corporate parenting role and improve the wellbeing and quality of life for children and young people, including those with Special Educational Needs and Disability. We will work with parents and carers to improve access to opportunities and reduce the numbers of children in poverty.

A large, stylized letter 'B' graphic on the left side of the page. The 'B' is composed of three overlapping shapes: a large orange 'B' in the center, a light blue 'B' behind it, and a yellow 'B' at the bottom left. All shapes have a thick black outline. The graphic is partially cut off by the left edge of the page.

## A BOLD **SAFE** BIRMINGHAM

### AMBITION:

Birmingham will be a city with vibrant and flourishing neighbourhoods that are safe and affordable, where vulnerable citizens are protected and supported, where diversity is celebrated, and citizens have pride in where they live. We want a city and communities with a strong sense of belonging and where everyone has access to a high-quality living environment, rich in culture and amenities, and good quality and affordable housing.

Outcomes for the city and citizens:

- Less crime and anti-social behaviour
- More people feeling safer
- More affordable housing
- Increased levels of walking and cycling
- Less homelessness

# PRIORITIES

## #9 Make the city safer:

We will work with citizens and partners, including West Midlands Police, to reduce crime, tackle anti-social behaviour and improve community and road safety so people feel safe in their daily lives, and feel it is easier and safer to walk and cycle in Birmingham.

## #10 Protect and safeguard vulnerable citizens:

We will ensure vulnerable citizens are protected, supported, and safeguarded, and where necessary looked after. We will work with partners to help prevent domestic abuse and violence against women and girls, and address violent crime in the city, including hate crime and knife crime.

## #11 Increase affordable, safe, green housing:

We will establish a housing programme that meets the needs of our citizens, building new homes and retrofitting existing homes, including increasing the supply of quality affordable safe, warm, and green housing. We will increase investment in the quality of Birmingham City Council's social housing and its communities, improving the quality of life for people who live there, ensuring they feel safe and secure.

## #12 Tackle homelessness:

We will work with our partners to prevent and tackle rough sleeping and homelessness and have housing solutions to meet the needs of our vulnerable citizens.



# A BOLD **HEALTHY** BIRMINGHAM

## AMBITION:

Birmingham will be a city in which every citizen can live a healthy enjoyable life. Where every citizen, at every stage of their life, in all communities can make healthy choices that are affordable, sustainable, and desirable to support them to achieve their potential for a happy, healthy life. Working with our partners, especially in the NHS, we will work to support our citizens (including families and carers) to understand their own physical and mental health and wellbeing and know how to access and get support in a timely and culturally appropriate way when they need it. We will create a city which is compassionate and inclusive to citizens, including people with disabilities and limiting longstanding illness, when they need support and assistance and work together to help them remain active participants in our city throughout their lives. A Bold Birmingham will be at the forefront of tackling health inequalities issues, reducing poverty, creating employment opportunities, and ensuring our city's air is clean.

Outcomes for the city and citizens:

- Reduced health inequalities
- Increased physical activity levels
- Improved mental wellbeing
- Increased levels of active travel

# PRIORITIES

## **#13 Tackle health inequalities:**

We will focus our attention on closing the health inequalities in our city, recognising they affect communities of place, identity, and experience differently, and that we can only achieve this through partnership with stakeholders and citizens (including their families and carers).

## **#14 Encourage and enable physical activity and healthy living:**

We will encourage citizens of all abilities and ages to engage in physical activity and active travel and develop a food strategy to support healthy lifestyles. We will provide new opportunities to improve physical health and overall wellbeing through the hosting of the Commonwealth Games, and its legacy including delivering high-quality housing, sporting facilities and transport infrastructure, and physical and cultural environments, including parks and green spaces.

## **#15 Champion mental health:**

We will champion and advocate the importance of mental health alongside physical health, and work with partners to empower and support citizens, including young people, to be mentally healthy.

## **#16 Improve outcomes for adults with disabilities and older people:**

We will continue to support citizens to lead independent lives and exercise choice and control. We will deliver the Government's new approach to care in a way that benefits our citizens and we will continue to invest in early intervention and prevention at every age to enable citizens to live healthy and fulfilling lives, including the transition from care for young people to that of adulthood.

A large, stylized graphic of the letter 'B' is positioned on the left side of the page. The 'B' is composed of three distinct color sections: a top section in orange, a middle section in light green, and a bottom section in a darker green. The letter has a thick black outline and is set against a solid yellow background.

## A BOLD GREEN BIRMINGHAM

### AMBITION:

Birmingham will be a city with a green heart and clean streets. It will enjoy an environment where air pollution has reduced, and the quality and quantity of public open spaces has increased. The city will be recognised for its response to the Climate Emergency. Sustainability and carbon neutrality will be at the heart of our environment, transport, and wider ambitions. We will continue to work with partners and citizens to advance our ambitions in active travel and better connectivity that creates a healthier environment for all.

Outcomes for the city and citizens:

- Cleaner streets
- Improved air quality
- Reduced carbon emissions
- Increased levels of walking and cycling
- Improved transport infrastructure

### **#17 Improve street cleanliness:**

We will work with our residents and businesses to improve the cleanliness of our city including through waste collection and recycling services and taking strong action against those who fly-tip and litter.

### **#18 Improve air quality:**

We will address air pollution, including increased monitoring and awareness, reducing congestion, and working for a future where every neighbourhood has safe levels of air quality to breathe.

### **#19 Continue on the Route to Net Zero:**

Our initiatives will facilitate carbon emissions reduction and build climate resilience into policies and practice. The council will reduce its own carbon emissions as well as fostering existing external relations, enabling behaviour change through informative calls to action and facilitating new community and public-private sector partnerships to build investment and delivery capacity to make our city carbon neutral.

### **#20 Be a City of Nature:**

We will maintain our existing and develop new green spaces across the whole of the city, adding infrastructure and improving access to diverse green and open spaces for all our citizens positively contributing to their physical and mental health. We will create sustainable green spaces to help tackle climate change and improve biodiversity, creating attractive neighbourhoods and providing places for families, friends, and communities to come together.







# Our response: becoming a bold best-in-class council

We are bold in our ambition and commitment to be a best-in-class council. We will continue to drive improvement and modernisation across our organisation so that we can deliver our priorities in the most effective, efficient, and productive way. We know becoming a best-in-class council will be a significant task which we will achieve by:

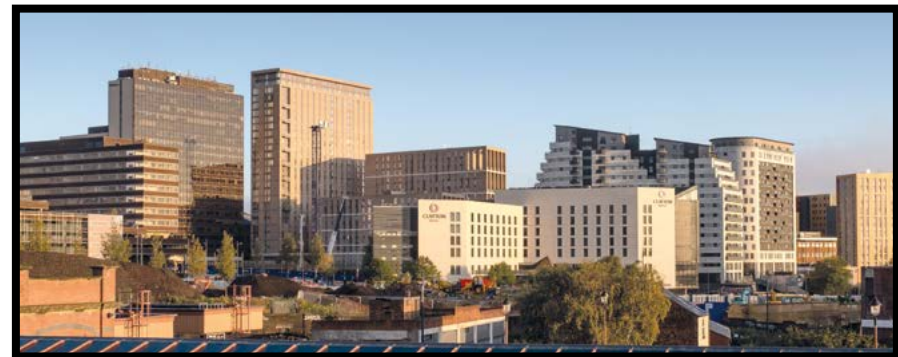
- Continuing to transform how we operate and deliver as one organisation
- Embedding our organisational values and behaviours into everything we do
- Ensuring a balanced and sustainable medium-term financial plan
- Promoting, championing and advocating diversity in everything we do

Together with our ambitions and priorities, these are the framework for our contribution to the city's response to the grand challenges, building on the opportunities and strengths of both the city and council.

## TRANSFORMING HOW WE OPERATE AND DELIVER

We will continue our transformation into a council that is built for the twenty-first century, using the modern technologies now available to us and having at its heart the values that lie behind our vision. We will organise our services around citizens and demand; leverage the city's many opportunities for the benefit of local people; connect with citizens in a meaningful way; and drive innovation within the organisation and across our partnerships.

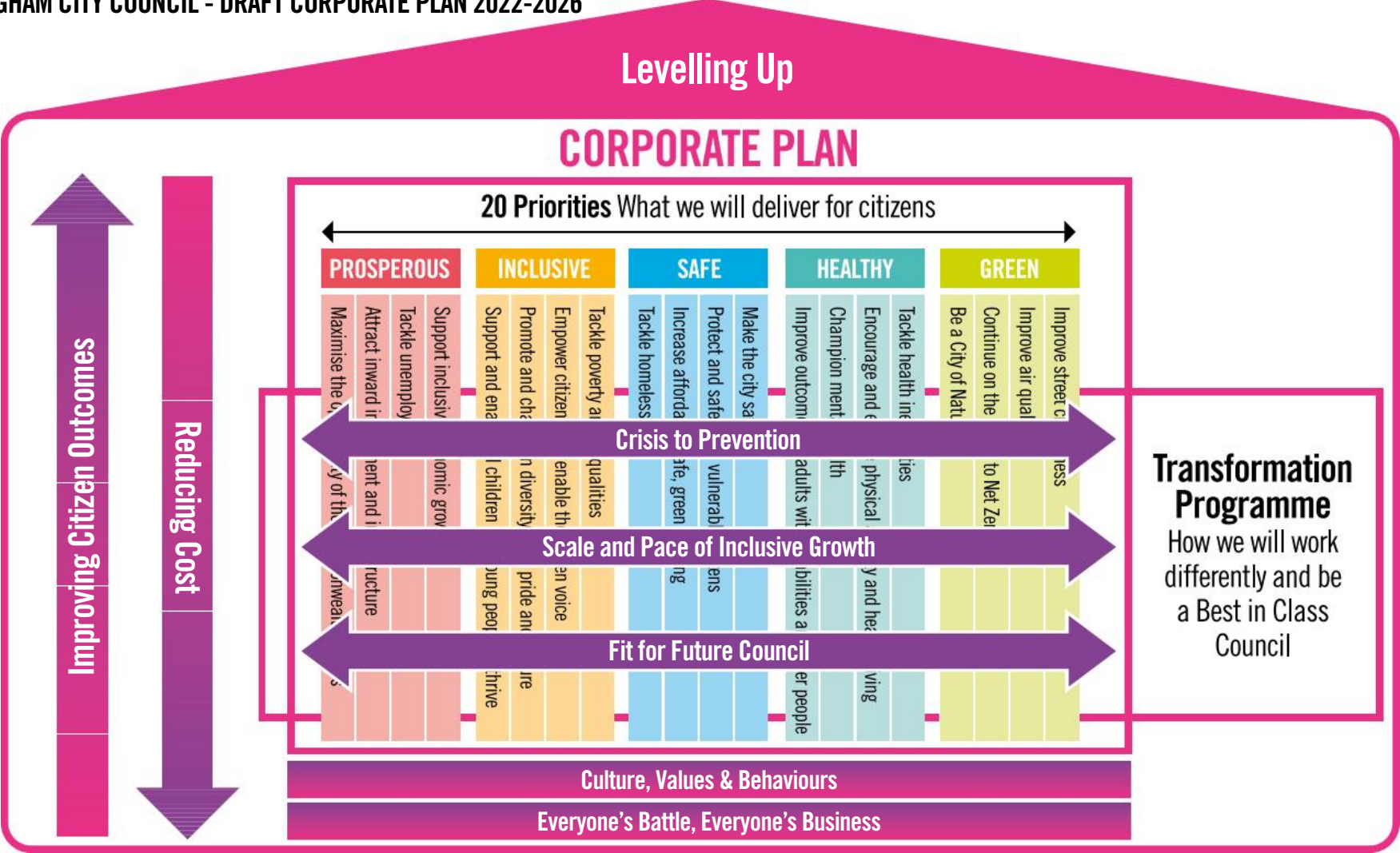
Our continued transformation as a council is based on three principles (People, Place, Council) that will improve citizen outcomes while reducing cost to the organisation.



PRINCIPLE	WHAT IT MEANS
<p>Shifting our focus from crisis to prevention <b>(People)</b>:</p>	<p>We will help and support individuals and families at the early stages of an issue or crisis in their lives before it becomes an acute problem.</p> <p>We will work with people differently, drawing on the support that exists in the community, and ensuring different groups of professionals work together on a common mission to help people stay afloat and then thrive.</p> <p>We will make best use of customer insight and business intelligence to ensure we make informed decisions and prioritise our resources appropriately embedding the principles of prevention, prediction, and early intervention into everything we do.</p> <p>We will take a whole system approach to promoting the independence and resilience of service users and communities, collaborating with partners, which places citizens and communities at the heart of our decision making.</p> <p>We will organise services around demand and citizen need, so we make the best use of our limited resources.</p>
<p>Increasing the pace and scale of growth, for those that need it the most, while delivering our climate change objectives <b>(Place)</b>:</p>	<p>We will use our city's assets and opportunities, such as HS2 and Commonwealth Games, to leverage growth and investment across the city to ensure all citizens share in the creation and benefits of sustainable economic growth.</p> <p>We will adopt a more active and deliberate stance, leveraging the council's balance sheet, and in so doing becoming the corner stone and enabler of a more circular, inclusive and sustainable economy.</p>

PRINCIPLE	WHAT IT MEANS
<p>Becoming a council fit for the future with clear strategies driving delivery and an organisation continuously improving <b>(Council)</b>:</p>	<p>We will develop a compelling vision that all the organisation can own and drive forward. This will ensure that our services to citizens will be high performing and built around the citizens.</p> <p>We will deliver relentlessly reliable services enabled by a strong performance management culture. Building on strong foundations, which means getting the basics right, all services must demonstrate they have a grip on the key issues and challenges and are responding with pace. This will be underpinned by a robust and sustainable strategic planning, financial and assurance framework.</p> <p>We will be a customer focussed, agile and responsive council through the better use of technology and utilising new delivery models and simplified processes.</p> <p>We will continue to develop an inclusive and diverse workforce at all levels which is supported to develop new skills and capabilities and empowered to be creative, innovative and outcome focussed and to exploit opportunities.</p> <p>We will develop strong partnerships to deliver better outcomes, working in teams alongside people who work for other organisations and connecting with citizens and communities in a meaningful way.</p>





**ENSURING A BALANCED AND SUSTAINABLE MEDIUM-TERM FINANCIAL PLAN**

Our Medium-Term Financial Plan (MTFP) is a key part of the prudent management and planning of the council's finances. It forecasts

forward the financial position of the council and is reviewed and developed alongside this Plan and our transformation plans, ensuring our financial resources are planned and deployed in line with our overall priorities and on the basis we will continue to improve citizen outcomes while reducing costs.





Symphony Hall ICC

## EMBEDDING OUR ORGANISATIONAL VALUES AND BEHAVIOURS

Our values will drive our behaviours and provide a clear basis for how we operate by providing the basis for our organisation's culture and ways of working:

VALUES	BEHAVIOURS AND APPROACH
We will put our citizens first	<p>Insight and experience: We will put citizens first in everything we do. Residents' expectations are rising, and citizens rightly expect services that are reliable, and joined up around their needs. These expectations fundamentally challenge how our services are designed and how they are led. We must ensure our decision-making is informed by empathy, high-quality insight, and data, and, where relevant, people's lived experiences.</p> <p>Participation and engagement: We will move towards our vision by pulling together as a city and having genuine pride in who we are and belief in what we can achieve. The council will play its part in building trust and promoting democratic participation and community power in everything it does, enabling communities to create their own responses to the challenges we face together.</p>
We are true to our word	<p>Keeping our promises: When we make promises we will keep them. We will deliver consistently and fairly. We need to do what we say we will and make sure issues we have addressed stay fixed.</p> <p>Building trust: We will understand and exceed rising citizen expectations. We will have an open, humble, and reflective approach to service delivery. We will be honest when we get it wrong and learn from it.</p>



VALUES	BEHAVIOURS AND APPROACH
We act courageously	<p>Being bold: We will be bold in our thinking in how we deal with the difficult issues and new challenges. We will think differently and act differently. We will be innovative and learn from others. We will encourage new ideas, try, and learn. We will exploit our strengths as a council and maximise the enormous opportunity and boundless potential of the City.</p> <p>Working in partnership: We will be a confident collaborator and partner. We cannot meet the challenges on our own, and we cannot create the modern, integrated services people want and need unless we work together with the other public services in the city. We want to proactively strengthen our partnerships with key institutions and businesses to create a strong civic family to lead the city.</p>
We will achieve excellence	<p>Exceeding expectations: We will strive to get things right first time every time. We will deliver relentlessly reliable services. We should strive to continuously improve our overall approach to customer service and be respectful in everything we do. We will improve our digital skills at every level. We will make use of the data we hold, safely and securely to achieve excellence in what we do.</p> <p>Continuous improvement: We will pro-actively continue to improve services and be performance focussed to identify areas across the council that need to improve.</p>



## Promoting, championing and advocating diversity

We will continue to implement our Everyone's Battle, Everyone's Business action plan to embed a focus on diversity and tackling inequalities in everything we do. We remain committed to:

- understand our diverse communities and embed that understanding in how we shape policy and practice across the council, knowing that this will inform better services that respond to the changing needs and priorities of our diverse residents.
  - demonstrate inclusive leadership, partnership, and a clear organisational commitment to be a leader in equality, diversity, and inclusion in the city. We need to create the right structures and processes to embed a culture of equity.
  - involving and enabling our diverse communities in our decision-making processes and in the wider city leadership structures.
  - delivering responsive services and customer care that is accessible and inclusive, and ensuring our policies meet the changing needs of our diverse communities across all our neighbourhoods.
- encouraging and building a skilled and diverse workforce to build a culture of equity and inclusion in everything we do. We need to lead by example as an employer, addressing inequalities affecting all the protected equalities characteristics and inequities including in Black, Asian and Minority Ethnicity representation across all levels of the organisation.





**BE BOLD BE BIRMINGHAM**







# Equality Impact Assessment

**Reference No: Draft  
Corporate Plan 2022 to  
2026**



## APPENDIX 2: EQUALITY IMPACT ASSESSMENT

<b>Title of proposed EIA</b>	Draft Corporate Plan 2022-2026
<b>Reference No</b>	EQUA948
<b>EA is in support of</b>	Previous plan titled Council Plan 2018-22 and Delivery Plan 2020-22
<b>Review Frequency</b>	Minimum of each new four-year plan. Will be conducted with any refreshed plans within the period.
<b>Date of first review</b>	23/06/2022
<b>Directorate</b>	Council Management / Strategy, Equalities and Partnerships
<b>Division</b>	Programmes, Performance and Improvement / Insight, Partnerships and Strategy
<b>Service Area</b>	
<b>Responsible Officer(s)</b>	Programmes, Performance and Improvement / Insight, Partnerships and Strategy Teams
<b>Quality Control Officer(s)</b>	Rebecca Hellard / Richard Brooks
<b>Accountable Officer(s)</b>	Rebecca Hellard / Richard Brooks
<b>Purpose of proposal</b>	The Corporate Plan replaces the Council Plan 2018-22 and Delivery Plan 2020-22 and presents a refreshed set of priorities for 2022-2026 that reflect the context we are now operating in, addressing the impact of the Covid-19 pandemic, tackling inequality and supporting the 'levelling up' of the city.
<b>Data sources</b>	Relevant reports/strategies/programmes and relevant research.
<b>Please include any other sources of data</b>	The priorities within the draft Corporate Plan reflect strategic direction and intent set out in a range of delivery plans and strategies including Route to Zero Plan, City of Nature Plan, Economic Recovery Strategy, Future City Plan, Transport Plan, Homelessness Prevention Strategy, East Birmingham Inclusive Growth Strategy, , The Budget and Medium-Term Financial Plan, Workforce Strategy, ICT & Digital Strategy, Transformation Programme and Everyone's Battle, Everyone's Business (the action plan to address inequalities within our organisation and through our civic leadership).
<b>Initial impact assessment</b>	<p>The Corporate Plan is a high-level strategic document setting out the council's vision and priorities. It recognises tackling inequalities as a high priority for the Council and puts tackling inequalities at the heart of our mission and at the centre of everything we do.</p> <p>The Plan is a high-level document intended to provide the context and framework for the council's strategic planning, decision-making, budget deployment and further transformation activity.</p>

	<p>A range of current and new delivery plans, strategies and programmes will help delivery the Corporate Plan priorities and will have their own equality assessment</p> <p>There is a vision within the Plan to make Birmingham a city where all citizens share in the creation and benefits of sustainable economic growth and can live longer, healthier, and happier lives.</p> <p>This vision is reflected throughout the whole plan and can be clearly seen in the council's mission statement (to support, serve and level up) and in the role the council will play in responding to the six grand challenges:</p> <ul style="list-style-type: none"> <li>• Unemployment, skills, and the local economy</li> <li>• Opportunities for children and young people</li> <li>• Community resilience, cohesion and living standards</li> <li>• Health and wellbeing</li> <li>• Climate Emergency</li> <li>• Equality and inclusion</li> </ul> <p>The Council will respond to these grand challenges by focusing on our transformation, delivery, enabling and influencing activity as one council to <i>Be Bold</i> and to achieve a:</p> <ul style="list-style-type: none"> <li>• <b>Bold Prosperous Birmingham:</b> <ul style="list-style-type: none"> <li>○ Support inclusive economic growth.</li> <li>○ Tackle unemployment.</li> <li>○ Attract inward investment and infrastructure.</li> <li>○ Maximise the benefits of the Commonwealth Games.</li> </ul> </li> <li>• <b>Bold Inclusive Birmingham:</b> <ul style="list-style-type: none"> <li>○ Tackle poverty and inequalities.</li> <li>○ Empower citizens and enable the citizen voice.</li> <li>○ Promote and champion diversity, civic pride and culture.</li> <li>○ Support and enable all children and young people to thrive.</li> </ul> </li> <li>• <b>Bold Safe Birmingham:</b> <ul style="list-style-type: none"> <li>○ Make the city safer.</li> <li>○ Protect and safeguard vulnerable citizens.</li> <li>○ Increase affordable, safe, green housing.</li> <li>○ Tackle homelessness.</li> </ul> </li> <li>• <b>Bold Healthy Birmingham:</b> <ul style="list-style-type: none"> <li>○ Tackle health inequalities.</li> <li>○ Encourage and enable physical activity and healthy living.</li> <li>○ Champion mental health.</li> <li>○ Improve outcomes for adults with disabilities and older people.</li> </ul> </li> </ul>
--	------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

## APPENDIX 2: EQUALITY IMPACT ASSESSMENT

	<ul style="list-style-type: none"> <li>• <b>Bold Green Birmingham:</b> <ul style="list-style-type: none"> <li>○ Improve street cleanliness.</li> <li>○ Improve air quality.</li> <li>○ Continue on the Route to Net Zero.</li> <li>○ Be a City of Nature.</li> </ul> </li> </ul> <p>They reflect the context we are now operating in, addressing the impact of the COVID-19 pandemic, tackling inequality, and supporting the 'levelling up' of the city.</p> <p>It also promotes, champions and advocates diversity through the implementation of our <i>Everyone's Battle, Everyone's Business</i> action plan to embed a focus on diversity and tackling inequalities in everything we do. We will lead by example as an employer, including addressing the current imbalance in gender and Black Asian minority representation across all levels of the organisation.</p> <p>Overall, the plan is inclusive and achieving our vision and priorities set out will bring positive benefits to every child, citizen and place.</p> <p>It is supported by a wide range of strategies, policies and programmes, each with their own equality assessment.</p>
<b>Protected characteristic: Age</b>	Not applicable
<b>Age details:</b>	N/A
<b>Protected characteristic: Disability</b>	Not applicable
<b>Disability details:</b>	N/A
<b>Protected characteristic: Gender</b>	Not applicable
<b>Gender details:</b>	N/A
<b>Protected characteristics: Gender Reassignment</b>	Not applicable
<b>Gender reassignment details:</b>	N/A
<b>Protected characteristics: Marriage and Civil Partnership</b>	Not applicable
<b>Marriage and civil partnership details:</b>	N/A
<b>Protected characteristics: Pregnancy and Maternity</b>	Not applicable
<b>Pregnancy and maternity details:</b>	N/A

## APPENDIX 2: EQUALITY IMPACT ASSESSMENT

<b>Protected characteristics: Race</b>	Not applicable
<b>Race details:</b>	N/A
<b>Protected characteristics: Religion or Beliefs</b>	Not applicable
<b>Religion or beliefs details:</b>	N/A
<b>Protected characteristics: Sexual Orientation</b>	Not applicable
<b>Sexual orientation details:</b>	N/A
<b>Socio-economic impacts:</b>	There are priorities in the Plan that seek to have a socio-economic impact such as tackling unemployment, increasing affordable housing tackling poverty, and supporting young people to thrive
<b>Please indicate any actions arising from completing this screening exercise</b>	The draft Corporate Plan sets out the high-level direction and beneath this will be directorate plans and associated performance measures. Any strategies and programmes arising from high level strategic direction will also be subject to equality assessment to determine whether there are any adverse impacts on those with protected characteristic.
<b>Please indicate whether a full impact assessment is recommended</b>	No
<b>What data has been collected to facilitate the assessment of this policy/ proposal?</b>	The draft Corporate Plan has been informed by an analysis of current plans and strategies, Delivery Plan and transformation programme.
<b>Consultation analysis</b>	The context for the Corporate Plan has been engaged on through CLT, ECLT, informal cabinet and O&S, and the five main themes and priorities in the draft Corporate Plan were included in the Financial Plan.
<b>Adverse impact on any people with protected characteristics</b>	No
<b>Could the policy/proposal be modified to reduce or eliminate any adverse impact?</b>	The Corporate Plan will be reviewed annually to assess whether any changes to priorities are required.
<b>How will the effect(s) of this policy/proposal on equality be monitored?</b>	The activities and measures identified to measure success of the draft Corporate Plan vision and priorities will be reported to

## APPENDIX 2: EQUALITY IMPACT ASSESSMENT

	Cabinet on a quarterly basis and form part of the council's Performance Management Framework.
<b>What data is required in the future?</b>	None
<b>Are there any adverse impacts on any particular group(s)</b>	No
<b>If yes, please explain your reasons for going ahead</b>	N/A
<b>Initial equality impact assessment of your proposal</b>	An assessment is next conducted when a refreshed plan is produced.
<b>Consulted People or Groups</b>	
<b>Informed People or Groups</b>	
<b>Summary and evidence of findings from your EIA</b>	<p>The Council Plan 2018 – 2022 focused on wanting to achieve six outcomes:</p> <ul style="list-style-type: none"> <li>• Birmingham is an entrepreneurial city to learn, work and invest in</li> <li>• Birmingham is an aspirational city to grow up in</li> <li>• Birmingham is a fulfilling city to age well in</li> <li>• Birmingham is a great city to live in</li> <li>• Birmingham residents gain the most from hosting the Commonwealth Games</li> <li>• Birmingham is a city that takes a leading role in tackling climate change</li> </ul> <p>The draft Corporate Plan reinstates our commitment to tackling inequalities, ensuring it is at the heart of our mission and the thread that runs through everything the council does as it plays its role in responding to six 'grand challenges' facing the city.</p> <p>The previous outcomes have been reframed to address the 'grand challenges' facing the city and reflect the context we are now operating in (addressing the impact of the Covid-19 pandemic, tackling inequality and supporting the 'levelling up' of the city), focusing our delivery on achieving:</p> <ul style="list-style-type: none"> <li>• A Bold <i>Prosperous</i> Birmingham</li> <li>• A Bold <i>Inclusive</i> Birmingham</li> <li>• A Bold <i>Safe</i> Birmingham</li> <li>• A Bold <i>Healthy</i> Birmingham</li> <li>• A Bold <i>Green</i> Birmingham</li> </ul> <p>The draft Corporate Plan also promotes, champions and advocates diversity and implementation of our <i>Everyone's Battle, Everyone's Business</i> action plan to embed a focus on embedding</p>



## APPENDIX 2: EQUALITY IMPACT ASSESSMENT

	<p>diversity and tackling inequalities in everything we do. We need to lead by example as an employer, including addressing the current imbalance in gender and Black Asian minority representation across all levels of the organisation.</p> <p>Overall, it is an all-inclusive plan that will tackle inequality and promote the needs of all our citizens and our workforce, reflecting on diversity. Achieving our vision and priorities set out will bring positive benefits to every child, citizen and place.</p> <p>The draft Corporate Plan is expected to be positively felt by people and communities across Birmingham and does not specifically distinguish between those with or without the protected characteristic.</p> <p>This high-level plan is supported by a wide range of strategies, policies and programmes, each with their own equality assessment.</p>	
<b>Submit to the Quality Control Officer for reviewing?</b>		
<b>Quality Control Officer comments</b>		
<b>Decision by Quality Control Officer</b>	Rebecca Hellard and Richard Brooks	
<b>Submit draft to Accountable Officer?</b>		
<b>Decision by Accountable Officer</b>	Rebecca Hellard	Richard Brooks
<b>Date approved / rejected by the Accountable Officer</b>	8 <sup>th</sup> July 2022	12 <sup>th</sup> July 2022
<b>Reasons for approval or rejection</b>		



**Birmingham City Council**  
**Report to Cabinet**  
**26<sup>th</sup> July 2022**



**Subject:** **Selly Park Conservation Area Appraisal and Management Plan**

**Report of:** **Strategic Director Place, Prosperity and Sustainability**

**Relevant Cabinet Member:** **Councillor Ian Ward – Leader of the Council**

**Relevant O & S Chair(s):** **Councillor Saima Suleman, Economy and Skills**

**Report authors:** **Julie Shaduwa, Principal Conservation Officer**  
**Email: Julie.shaduwa@birmingham.gov.uk**  
**Andrew Fuller, City Design Manager**  
**Email: andrew.fuller@birmingham.gov.uk**

Are specific wards affected?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No – All wards affected
If yes, name(s) of ward(s): Bournbrook and Selly Park		
Is this a key decision?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No
If relevant, add Forward Plan Reference: 010148/2022		
Is the decision eligible for call-in?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No
Does the report contain confidential or exempt information?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
If relevant, provide exempt information paragraph number or reason if confidential:		

## **1 Executive Summary**

- 1.1 This report seeks approval for the adoption of the Selly Park Conservation Area Appraisal and Management Plan, the adoption of the new boundary and new Article 4 Direction.
- 1.2 This report follows those approved on 24<sup>th</sup> June 2017 (Conservation Area Review Report: Public Consultation), 8<sup>th</sup> February 2019 (Conservation Area Review: Implementation of findings), and 15<sup>th</sup> December 2020 (Conservation Areas Update and Proposals), which together address the Conservation Area Review of all conservation areas across the city. The 2020 report included

Selly Park Conservation Area into the wider review following local community aspirations to adopt a new Conservation Area Appraisal and Management Plan, propose a new boundary and new Article 4 Direction.

- 1.3 The Conservation Area Review seeks to consolidate the then 30 conservation areas through merging, boundary changes and management plans / Article 4 Directions. In the case of Selly Park, the community sought a boundary change, new management plan and Article 4 Direction.
- 1.4 The 2020 report therefore authorised the drafting of the Conservation Area Appraisal and Management Plan, Article 4 Direction and boundary change for Selly Park Conservation Area, along with approval to go through a public consultation process on these documents
- 1.5 This report provides an update on the work carried out in line with the 2020 report in relation to Selly Park Conservation Area, which includes the writing of and consultation on a Conservation Area Appraisal and Management Plan, a proposed new boundary and new Article 4(2) Direction.

## **2 Recommendations**

- 2.1 To approve the Selly Park Conservation Area Appraisal and Management Plan, the proposed boundary changes and new Article 4(2) Direction.

## **3 Background**

- 3.1 The statutory requirements of the Local Planning Authority concerning the designation and management of Conservation Areas is legislated under the Planning (Listed Buildings and Conservation Areas) Act 1990. This is set out in greater detail under paragraphs 5.2 through 5.4 of the 2017 report.
- 3.2 A review of the continued management of all conservation areas within the Birmingham area was undertaken by the City Council in 2017, in accordance with Paragraph (2) of Section 69 of the Planning (Listed Buildings and Conservation Areas) Act 1990. The legislation requires for such a review to be undertaken on a regular basis. Current best practice suggests this should be done every 5 years.
- 3.3 Paragraph (2) of Section 69 also requires that under a Conservation Area Review process, consideration should also be given to further areas which may need to be designated, merged, or altered.
- 3.4 Section 71, Paragraph (1) of the Act requires the local planning authority from time to time to formulate and publish proposals for the preservation and enhancement of any parts of their area which are conservation areas.
- 3.5 Paragraph (2) of Section 71 requires that proposals under this section shall be submitted for consideration to a public meeting in the area to which they relate and under Paragraph (3) that the local planning authority shall have regard to

any views concerning the proposals expressed by persons attending the meeting.

- 3.6 The Selly Park Conservation Area was not specifically addressed under the 2017 report but was addressed in the 2020 report due to public support to review the management of the area. The local community were keen to develop, with the Council, new management plans and review the boundary (additions and deletions).
- 3.7 The local community have therefore chosen to work with the Local Planning Authority and produce a draft Conservation Area Appraisal and Management Plan (CAAMP). As part of this exercise it was proposed that the designation boundary could be altered and for a new Article 4(2) Direction to be made and to go to consultation on the proposed changes.
- 3.8 The local community were instrumental in researching, collating and producing the content of the document in line with the standard format of the city council's other CAAMP documents. This included a collaboration between the Selly Park Property Owners Association (SPPOA) and council officers. The community sought to address the specific challenges of managing the conservation area going forwards for all members of community.
- 3.9 Following approval of the 2020 report the drafting of a new CAAMP was undertaken and a public consultation process was carried out on this draft Selly Park Conservation Area Appraisal and Management Plan, the proposed boundary amendments and a new Article 4 (2) Direction.
- 3.10 The public consultation ran for an eight-week period between Monday 9<sup>th</sup> August 2021 and Friday 1<sup>st</sup> October 2021 and a public meeting was held at St. Stephen's Church, Selly Park on Tuesday 7<sup>th</sup> September 2021. All residents were notified of the consultation by letter and the consultation was advertised in the local press and on the city council's website. The public meeting was well-attended and supported by ward councillors.
- 3.11 Consultation documents were made available on-line and hard copies were made available in the local area throughout the consultation period.

#### **4 Options Considered and Recommended Proposal**

- 4.1 **Option 1 – Do Nothing:** The Council could choose not to accept the recommendations in this report. However, to not do so would mean that the Council would not be fulfilling its duty to review its Conservation Areas under the Planning (Listed Building and Conservation Areas) Act 1990 or meet the expectations of the local community.
- 4.2 **Option 2 – Approve the Report Recommendations:** To approve the recommendations outlined in Section 2 of this report as part of the Local Authority's duty to review its Conservation Areas under the Planning (Listed Building and Conservation Areas) Act 1990 and effectively manage the Conservation Area.

- 4.3 **The recommended option is Option 2.** To approve the report's recommendations

## **5 Consultation**

- 5.1 The draft Selly Park Conservation Area Appraisal and Management Plan, proposed boundary amendments and proposed new Article 4(2) Direction have been consulted on as required by the primary heritage legislation (the 1990 Act) and as part of best practice guidance from Historic England. All residents in the existing conservation area were consulted by letter, as well as those properties proposed for inclusion as part of the new boundary. The proposals were taken to a public meeting in line with the council's statutory duty under Paragraph (2) of Section 71 of the Planning (Listed Building and Conservation Areas) Act 1990.
- 5.2 The local community, particularly the SPPOA, were instrumental in designing and facilitating the consultation event in partnership with the city council, in delivering the public consultation event, plus working with the community to provide access to hard copies of the document and to promote the new management plan and help generate buy-in to the adoption of the document, the proposed boundary and Article 4 Direction by the local community.
- 5.3 Local Councillors, Cllr. Brigid Jones and Cllr. Karen McCarthy, in the ward of Bournbrook and Selly Park, were consulted by email and Cllr. McCarthy attended the public meeting. The Selly Park Property Owners Association (SPPOA), Historic England, the Victorian Society and the Birmingham Civic Society were also consulted with responses positive.
- 5.4 Historic England gave particular recognition to the work of the local community throughout the process stating *"...the role played by Selly Park Property Owners' Association (SPPOA) is to be thoroughly applauded both as regards the production of the Appraisal and in relation to assisting in the positive management of the conservation area going forwards"*.
- 5.5 In total 23 written responses to the public consultation were received. The responses are set out in Appendix 4 along with officer's comments addressing the points made. Overall, there was an overwhelming support for the appraisal document with some minor queries on the wording of some text in the draft document which has been amended to reflect the issues raised.
- 5.6 Overall, there was generally positive support for the proposed boundary amendments with 5 objections. The objections relate mostly to the proposed inclusion of areas which are not considered to hold sufficient architectural and historic interest. Officers have reviewed the proposed areas and consider, along with the overall support received from residents, SPPOA and Historic England, that the conservation area boundary changes suggested have clearly been arrived at after thoughtful analysis and the aspirations of the local community to include the proposed areas is supported

- 5.7 There were 2 written responses from residents of Bournbrook Road in support of inclusion in the conservation area.
- 5.8 Overall, there were no objections to the proposed new Article 4 Direction to cover Bournbrook Road. The new Article 4 Direction, as consulted on, will include those properties on Bournbrook Road, subject to approval of inclusion within the conservation area boundary.

## **6 Risk Management**

- 6.1 There is a risk that failure to adopt the proposed Selly Park Conservation Area Appraisal and Management Plan could negatively impact on the long-term management of the conservation area as without an up to date plan for the preservation and enhancement of the area harmful development could take place without effective policy to challenge it.
- 6.2 There is also a risk that if the Conservation Area review recommendations are not accepted, the Council will not be fulfilling its duty under the Planning (Listed Building and Conservation Areas) Act 1990.

## **7 Compliance Issues:**

### **7.1 How are the recommended decisions consistent with the City Council's priorities, plans and strategies?**

- 7.1.1 The recommendations meet the Council's priorities in terms of "achieving excellence". It will do this by trying to maximise the potential of the Selly Park Conservation Area in terms of improving and respecting local heritage to support the local economy and neighbourhoods. The wider conservation area recommendations, if implemented, will also support these objectives. In doing this the recommendations will help to meet another of the Council's priorities "We put citizens first" and the Council Plan 2018-2022 (as updated in 2019) objective of: "Birmingham is a great city to live in".
- 7.1.2 The recommendation is also supported by Birmingham Development Plan Policy "TP12 Historic Environment".

### **7.2 Legal Implications**

- 7.2.1 The continued management and expansion of the conservation areas seeks to 'preserve and enhance' the 'special architectural or historic interest' of that area (Section 69 of the Planning (Listed Buildings and Conservation Areas) Act 1990).
- 7.2.2 The designation of conservation areas is undertaken by the Local planning Authority itself, and is a statutory function governed by the Planning (Listed Buildings and Conservation Areas) Act 1990. The Local Planning Authority is under a duty to review existing conservation area designations from time to time.

- 7.2.3 Article 4 of the Town and Country Planning (General Permitted Development) (England) Order 2015 empowers a local planning authority to make an Article 4 direction and Schedule 3 contains the procedures for making Article 4 directions.

### **7.3 Financial Implications**

- 7.3.1 Work to review the Conservation Areas and undertake the required consultation was undertaken by staff within Place, Prosperity and Sustainability (Planning and Development) and the costs have been met from the approved Planning and Development revenue budget.
- 7.3.2 Additional work arising from implementation of this report will be funded from existing approved revenue budgets and staffing within Place, Prosperity and Sustainability directorate.

### **7.4 Procurement Implications (if required)**

- 7.4.1 There are no procurement implications

### **7.5 Human Resources Implications (if required)**

- 7.5.1 There are no human resources implications.

### **7.6 Public Sector Equality Duty**

- 7.6.1 An Equality Analysis screening on the city-wide conservation area review was undertaken in 2017. It is considered that the proposals are still current and will have no adverse impact on the groups and characteristics protected under the Equality Act 2010. However, the Selly Park Conservation Area Appraisal and Management Plan recommendation is additional to these previous recommendations and so a supplementary equality analysis has been conducted (see Appendix 5)

## **8 Appendices**

- 8.1 Appendix 1 – Selly Park Conservation Area Appraisal and Management Plan
- 8.2 Appendix 2 – Proposed Boundary Map
- 8.3 Appendix 3 – Article 4 Direction
- 8.4 Appendix 4 – Summary of consultation comments and responses of the Council
- 8.5 Appendix 5 Equality Analysis

## **9 Background Documents**

- 9.1 Conservation Area Review Report: 2017



- 9.2 Conservation Area Review: Implementation of findings: 2019
- 9.3 Conservation Areas Update and Proposals: 2020



**BIRMINGHAM** CONSERVATION  
**AREA**  
CHARACTER  
APPRAISAL AND  
MANAGEMENT  
**PLANS**

**Selly Park Conservation Area**  
Character Appraisal and Management Plan

May 2022





# Contents

Foreword	3
Introduction	4
Designation and boundary changes	6
Summary of significance	8
<b>Part 1 Character appraisal</b>	11
Conservation Area setting	12
Topography, geology and archaeology	14
Development history	16
Townscape character	18
Character areas	22
Pressures on the Conservation Area	38
<b>Part 2 Management plan</b>	41
Guidance	42
Enhancement schemes	46
Ongoing management	47
Opportunities for positive future change	48
<b>Appendices</b>	
Appendix A - Statutory listed buildings	50
Appendix B - Wider planning policy framework	51
Appendix C - Article 4(2) direction	52
Appendix C - Archaeological sites and monuments	53
Appendix E - Equality analysis	55





The Selly Park Conservation Area is a unique place and a valued asset through its special architectural and historic interest. It hosts a number of high quality historic buildings in the three principal character areas, including the landmark church of St. Stephen. It is an essential part of Selly Park's identity and heritage, and is special to Birmingham as a whole.

The Character Appraisal and Management Plan provides policies to ensure that the Conservation Area will be protected and enhanced and will continue to contribute fully to Selly Park as a successful suburb of architectural, historic and environmental merit.

The Management Plan sets out the policies for future development in the area and highlights opportunities for improvement. This is informed by the Character Appraisal which identifies what makes the area special and defines its character.

The city council are committed to ensuring that this asset endures for the enjoyment of future generations of Selly Park. This can be achieved by continuing to work together with local people, community organisations, landowners and other public/private sector partners.

We wish to thank the Selly Park Property Owners' Association (SPPOA) for their role in helping to prepare and deliver this document, and especially the following SPPOA committee members: Richard Batley and Ann Chancellor Davies who drafted the text, and Tom Axford who compiled photographic records of houses in Selly Park. Thanks also to local historian Wendy Pearson for her advice.

**Councillor Ian Ward**  
Leader,  
Birmingham City Council.

# Introduction

The Planning (Listed Buildings and Conservation Areas) Act 1990 places a duty on local authorities to designate Conservation Areas and from time to time review their designation. It also requires them to formulate and publish proposals for the preservation and enhancement of these areas.

The Selly Park Conservation Area was designated by Birmingham City Council on 13th May 2009 in recognition of its status as an area of 'spacious plots and generously proportioned architect designed residential properties, open spaces; a pocket of leafy suburbia close to Birmingham City Centre'.

Conservation Area status gives the City Council additional powers regarding demolition, minor development and the preservation of trees. It also places a duty upon the City Council to pay special attention in the exercise of its planning functions to the desirability of preserving or enhancing the character and appearance of the Conservation Area.

Local authorities are required by national planning policy (National Planning Policy Framework paragraph 186) to have a suitable evidence base for historic environment and heritage assets. For Conservation Areas this usually takes the form of a character appraisal which is then used to inform a management plan that sets out policies and proposals to aid the preservation and enhancement of the area.

The Birmingham Development Plan adopted on 10th January 2017 describes the surrounding areas of Selly Oak and South Edgbaston as focuses of major renovation and

investment, but where importance should also be attached to conserving attractive, balanced and sustainable residential communities (Policy G9). The current local planning policy - the Wider Selly Oak Supplementary Planning Document (June 2015) while not addressing Selly Park explicitly, recognizes the need to balance development opportunities with the need to maintain desirable residential areas.

The Selly Park Character Appraisal and Management Plan (CAAMP) aims to:

- Identify the special interest of Selly Park Conservation Area and provide an evidence-based definition of its character.
- Provide a sound basis for the determination of planning applications within the Conservation Area and the formulation of proposals for its preservation and enhancement.
- Identify opportunities and threats to the special character of the Conservation Area and provide proposals to address these potential issues.
- The Selly Park CAAMP will be adopted as a 'material consideration' in the planning process and has been prepared in accordance with policies listed in Appendix B.





# Designation and boundary changes

The Selly Park Conservation Area was designated on 13th May 2009 and an Article 4(2) Direction was served limiting some permitted development rights to most dwelling houses within the Conservation Area.

The locally listed and Grade II listed buildings shown at Appendix A were identified or designated prior to the designation of the Conservation Area. Appendix C lists the individual domestic properties covered by the Article 4(2) Direction.

The Selly Park Conservation Area covers an area of approximately 70 hectares and is situated approximately three miles (4.8km) to the south west of Birmingham city centre. It is entirely contained within the Ward of Bournbrook and Selly Park in the Selly Oak Constituency.

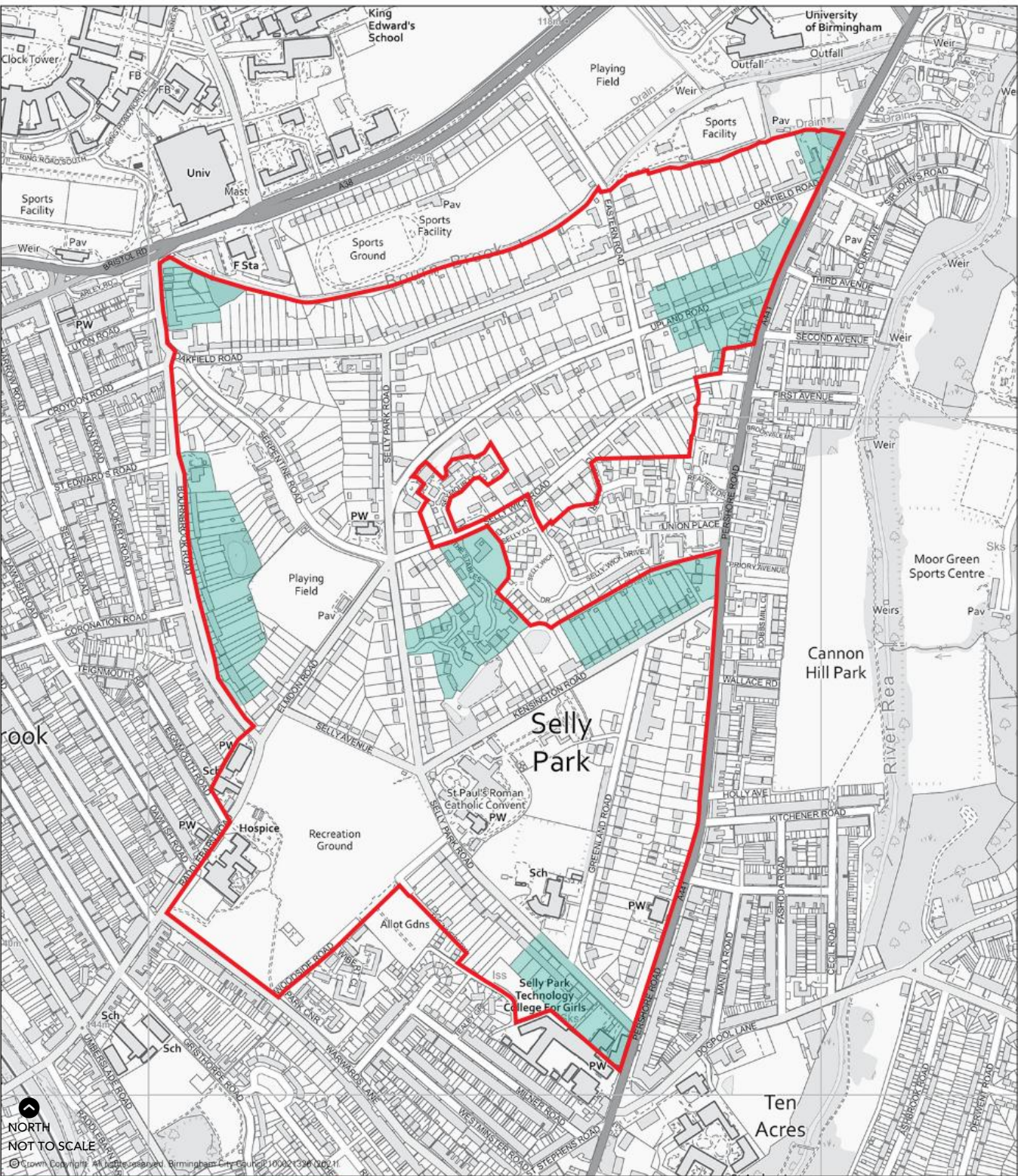
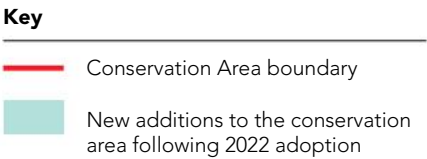
The boundary of the Selly Park Conservation Area was reviewed through public consultation in September 2021. The Local Authority considered the modification of the boundary on two main grounds. The first consideration is that Selly Park's distinctiveness is not just distantly historic. It has grown in waves of development that reflect changing ideas about what makes good quality suburban housing up until the present day. The result is a Conservation Area that contains a heterogeneous mix of architectural styles brought together by their shared environment of low density and greenery.

The second consideration is managerial. Selly Park contains two overlapping areas which both have heritage implications. In addition to the Conservation Area itself, there is also the boundary given by the covenants that have protected Selly Park since the 19th century; these remain an important instrument of conservation that can be exercised by property-owners.

The overlapping boundaries and differing forms of conservation management can create confusion not only for residents but also for developers and can affect the ability to exercise rights and to manage the Areas.

Following the outcome of the public consultation, the Conservation Area boundary has been re-drawn at the margins to be as far as possible consistent with the covenanted area and to support the management of this historic area. On these grounds, as well as the representative nature of their houses and landscape features, the following areas are now included in the Conservation Area:

- East end of Upland Road.
- Eastern side of Bournbrook Road together with the large pond behind the gardens of 81-95 Bournbrook Road.
- Southern end of Selly Park Road.
- Northern side of Kensington Road.
- The Stables and Southbourne Close, two private residential estates of good quality houses in landscaped areas, built in the 1980s in what had been the grounds of Highfield House. The Stables has nine houses and Southbourne Close ten. The residents of Southbourne Close own and manage the surrounding woods and lake which are already part of the Conservation Area.



**Plan 1**  
Boundary of the Selly Park Conservation Area.



# Summary of significance

Selly Park is notable as an area of spacious plots, architect designed residential properties, and open space - a pocket of leafy suburbia near to Birmingham City Centre.

It owes these qualities to its history and also to a series of waves of architectural evolution:

- **An inherited place:** An inheritance of roads, wooded areas and lakes (fishponds) remain from Selly Park's pas, originally the estate of Selly Hall. There is evidence going back to the Domesday Book that the hall occupied the site of St Paul's Convent, its 19th century version still forming part of the convent building.
- **An inherited townscape:** Selly Park owes much of its character to Robert Dolphin who in 1854 sold 146 acres for residential development subject to restrictive covenants - similar covenants apply to another 30 acres sold in 1870. This is a prominent national example of covenants applied to suburban development with the objective of preserving environmental quality. The restrictive covenants have produced in Selly Park a residential area of large houses, pleasing streetscapes, and an abundance of mature trees along the roads and in large gardens.
- **165 years of conservation in practice:** The covenants, which remain in force, specify that each plot should be a minimum of a quarter acre; houses should be detached (and semi-detached until the 1870s) and well set back from the road; noisy and offensive trades were banned. The covenants enable owners to enforce the upkeep of these requirements against their breach by any other owner in the area.

In 2009, the designation of the Conservation Area added the weight of planning legislation to secure the environment and architecture of the area.

- **Representative house styles:** Selly Park has evolved to include many examples of house design. These include Georgian houses in Selly Wick and Pershore Roads, several country house sized Victorian houses (Uplands, Copperfield House, Beechenhurst), and a large number of Victorian family homes with stable blocks especially in Oakfield Road. There are Arts and Crafts houses on Selly Park Road, Bauhaus style 1930s houses on Kensington Road, and interwar houses on Selly Park and Bournbrook Roads. There are post war houses on Selly Avenue, Selly Park, Oakfield, Greenland and Kensington Roads, and large detached houses from the 1980s and 1990s in Southbourne Close and The Stables.
- **A green landscape:** Beyond its houses, gardens and tree lined streets, the special quality of Selly Park lies in its topography and landscape features. These include large open spaces - the Elmdon Road playing fields and the Selly Park Recreation ground, the lake and landscaped grounds of Cleeve House, the pools and trees of the former Highfield estate, and the extensive grounds of St Paul's Convent. There are long views into and out of the estate of Birmingham University's clock tower, St Stephen's church and, from the highest points of Selly Park, of Cannon Hill Park.







Selly Park Conservation Area

PART 1  
CHARACTER APPRAISAL



# Conservation Area setting

Selly Park Conservation Area is not only a green area but also has several parks and green spaces in the vicinity: Cannon Hill, Moor Green, school playing-fields and Edgbaston golf course.

On the other hand, it is surrounded by two arterial roads, and areas of intensive development. Some of the latter have existed since Selly Park's early development while others are much more recent.

The western boundary of the Conservation Area marks the break between Selly Park's low density plots and the high density terraced housing of Bournbrook which was built from about 1890, after Selly Park's development was already underway. These two models of urban development were in sharp contrast.

The extension of terraced housing from Bournbrook onto part of the Selly Park Estate (the corner of Raddlebarn Road and Warwards Lane) in contravention of the Estate's covenants led in 1912 to a successful High Court battle against contravention of the Estate's covenants. This became a landmark case on the viability of enforcing covenants, and the cause of SPPOA's foundation in 1911.

The southern and eastern boundaries of Selly Park also mark a break between Selly Park's low density and higher density Victorian and Edwardian housing, though with much larger houses and gardens than in Bournbrook.

High density housing to the South, West and East, particularly where it has three storeys (or where rooms are extended into lofts), offers an attractive investment opportunity to rentier landlords. Without Article 4(1) protection, Bournbrook in particular is a target for house conversions. As a result, population density around Selly Park has greatly increased within the same general structure of buildings.

In the area to the North of Selly Park, construction of new institutions has taken place, particularly since 2010. On the Calthorpe Estate, this includes a dental hospital, private hospital and care homes, high rise purpose built student accommodation (PBSA), and car-parking. To the North-West, large blocks of high-rise PBSA have been built on and around Aston Webb Boulevard, and then further West on Bristol Road; and more are planned.

Housing development has a knock-one effect on the setting of Selly Park Conservation Area, transforming the nature and level of commercial activity, traffic and parking.





# Topology, geology and archaeology

Selly Park is situated on the almost flat Birmingham plateau, rising from about 120 metres at Oakfield and Pershore Roads to 142 metres at the highest point in the Selly Park Recreation Ground near to the Selly Park Convent.

The Conservation Area lies between the valleys of the Bourn Brook to the North and the Rivers Rea to the East. Springs run from the highest point to feed small irregular streams that feed man-made ponds and small lakes behind the gardens of houses on the east side of Bournbrook Road and behind the woodland and gardens to the north of Kensington Road.

The underlying geology is of Sidmouth Mudstone with a superficial covering of alluvial clay, silt in the lower parts of Selly Park, and at the higher points glacial fluvial mid-Pleistocene, sandstone and gravel (British Geological Survey: <http://mapapps.bgs.ac.uk/geologyofbritain/home.html>). These free-draining soils have provided a suitable basis for house and road building, possibly since Roman times across Selly Park (Peter Leather, Birmingham Roman Roads Project 1994-1999).

The Birmingham Roman Roads Project led by Peter Leather of the University of Birmingham undertook a series of studies between 1994 and 1999 to investigate the possibility that a Roman road leading to Metchley fort had crossed what is now Selly Park Recreation Ground.<sup>1</sup>

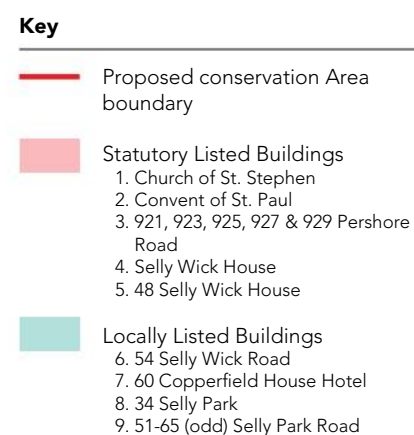
No conclusive evidence of the road was found, but there were other finds: a Neolithic flint, a fragment

of Iron Age pottery, and a 15th century road that took a dog-legged route from Warwards Lane along Raddlebarn Road and down Bournbrook (ex-Selly Hall) Lane, following what was surmised to be the boundary of Selly Manor.

Other archaeological finds include a Roman coin at Raddlebarn Road, and a moated site and adjacent ponds (possibly originally fishponds) in the gardens of Kensington Road, Southbourne Close and The Stables (see Appendix D).

There is archaeological dispute about whether modern day Selly Park is the location of the original Selly Hall and its surrounding manor; an alternative proposal is that the original manor was located about 400 yards from Bournville Green. However, near to the moat and 'fishponds' is the Generalate and Convent of the Congregation of the Sisters of Charity of St Paul the Apostle which was built in 1864.

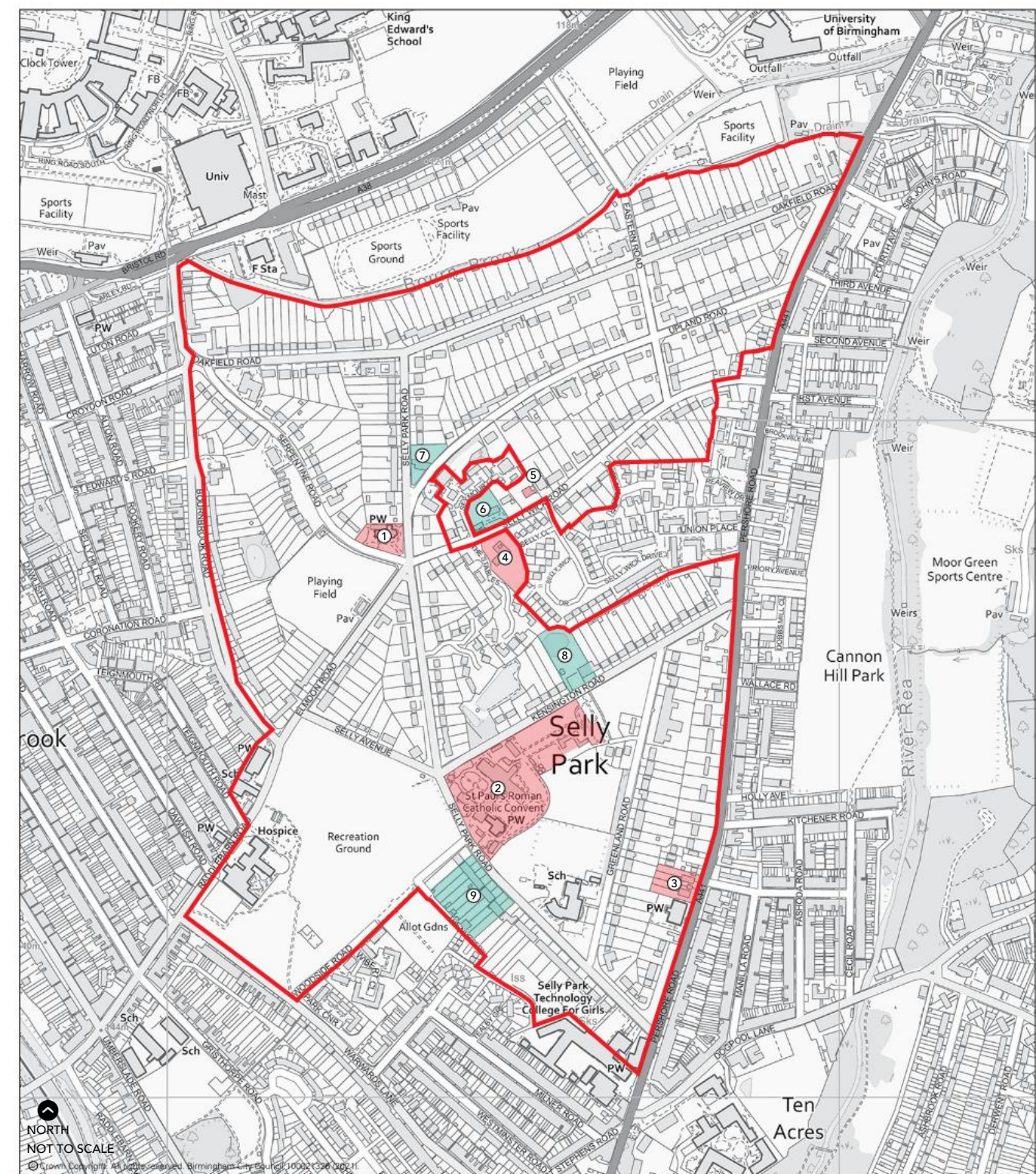
Incorporated within the Convent buildings is Selly Hall, a Georgian building in the Palladian style, which was sold in 1835. British History Online Vol.3 for Northfield Parish traces Selly Hall back from 1835 through its previous owners to the Domesday Book which refers to two manors of Escelie (Selly).<sup>2</sup> Like present day Selly Park, one of these estates lay across the River Rea from Muselie (Moseley).<sup>3</sup>



<sup>1</sup> Baker, Anne and Peter Leather (1998) 'Birmingham Selly Park Recreation Ground' in West Midlands Archaeology Issue 41.

<sup>2</sup> See <https://www.british-history.ac.uk/vch/worcs/vol3/pp194-201>.

<sup>3</sup> Morris, John (ed) (1982) The Domesday Book: Worcestershire. Phillimore and Co.



**Plan 2**  
Statutory and Locally Listed Buildings.



# Development history

The built character of the Selly Park Conservation Area reflects its controlled growth as a desirable residential suburb for the increasing number of businessmen and professionals involved in the rapid growth of Birmingham in the middle of the 19th Century.

On 176 acres purchased by Birmingham Solicitor Robert Dolphin, just over the Bourn Brook from Lord Calthorpe's estate on the south side of Birmingham, a Building Scheme was prepared for what eventually would become the Selly Park Conservation Area.

In contrast to much of the overly dense speculative building which the city's rapid growth had engendered, wide roads were made up, and plots designed. Restrictive covenants stipulated no less than a quarter of an acre per plot, no more than two houses joined together, the price per house, and their distance from the road. The only permitted buildings were "dwelling houses with suitable outbuildings". The gradual development resulted in a wide range of architectural styles being represented across the estate, where houses from the 1870s have neighbours from the 1920s (e.g. Eastern Road), and some of the oldest find themselves next to and opposite the most modern in design (e.g. Oakfield Nos.92 and 94 and No.93 and No.101).

The 1870s houses are not the oldest surviving buildings. What remains of Selly Hall, named on the 1835 Sale Plan of the estate, is now part of St. Paul's Convent, having been bought from Robert Dolphin in 1864, and is a Grade II listed building. 'Selly Park Hall', the only one of the Convent's buildings to be listed, is called The Generalate, and is described as an early 19th century two storey building. The Gatehouse and the boundary walls were built in the 1870s, followed by cloisters and an entrance block. The convent grounds,

however, share a large triangular site between Kensington Road, Greenland Road and part of Selly Park Road with Selly Park Primary School.

Selly Wick House, also on the 1835 sale plan, remains a family home and its listing describes it as "circa 1840 though of possibly late 18th century origin." Other listed buildings of a similar date and style can be found on Pershore Road, although only Nos.921 and 923 and 927 and 929 have been included within the conservation area boundary. Originally called 'Selly Place' these villas are distinctly Georgian in style, of stucco with plain moulded string courses, rustication, sash windows and a variety of understated classical features in the window mouldings and door casings.

The foundation stone for St. Stephens was laid in 1870, and the church consecrated in August 1871 on land given by Robert Dolphin. The £3,700 cost of building it was furnished by, mainly local, donation. It is Grade II listed and is built of locally quarried Hamstead stone, with a 40m high Bath Stone broach spire. Its position at the highest point in the Conservation Area means that the spire is visible for miles around. In 2015, a new two storey Parish Centre linked to the north side of the church was unveiled, with a generous circular entrance hall providing both further space and access to Church and Centre.

St. Edwards Roman Catholic church is located on Raddlebarn Road near the junction of the old roman icknield way at the highest

point of Selly Park Conservation area. The building is an imposing early twentieth century Gothic Revival church which is faced in red brick with stone dressings, and the steeply pitched roof is laid with Westmorland slates with coped verges and the glazing is of leaded stained glass. Henry Thomas Sandy of Stafford and G. B. Cox were commissioned to design the building and this was built in three phases by William Bishop of King's Heath with the church and the nave opened on 13 October 1902 by Edward Ilsey, Roman Catholic Bishop of Birmingham and Samuel Webster Allen, Roman Catholic Bishop of Shrewsbury. The sanctuary and side chapels were built between 1925 and 1926 according to a George Bernard Cox design, of Harrison and Cox. The builders were John Bowen and Sons of Balsall Heath and the western end of the church was completed in 1936".

Highfield, the Uplands and Beechenhurst were all built in the 1860s. All that remains of Highfield, which was demolished in the early 1980s, are tales of Birmingham's Bohemian past, when the house was owned by Professor Philip Sargeant Florence, decorated in the 1930s with large contemporary murals, and visited by the likes of poets Louis MacNeice and William Empson. Southbourne Close was developed on Highfield's grounds in the 1980s, the lake and surrounding woodland backing on to Kensington Road survive.

The Uplands, two houses, Nos.63 and 65 Upland Road, were completed in the mid-1860s. Only one remains, No.65, but the

red brick Italianate-villa style house, made even taller by incorporating an arched basement entrance, is still visible behind the imposing rusticated high stone walls that once surrounded both houses. The walls still run around three sides of the original grounds in sections of Upland, Selly Park and Selly Wick roads.

Another once impressive family home in the conservation area is Beechenhurst which has recently been subject to some neglect although is in the process of being repaired and restored.

The 1871 Census (and 1872 Kelly's Directories of Worcester) show that a number of family homes had been completed on the estate, the majority of which in Oakfield Road. Already they indicate an interesting contrast in architectural

taste and style. While one or two of these early houses are at quite an impressive scale, such as Willowbrook and Camden house opposite, the size became more modest as the slow but steady development of the estate took place from the 1870s.

## Pattern of growth

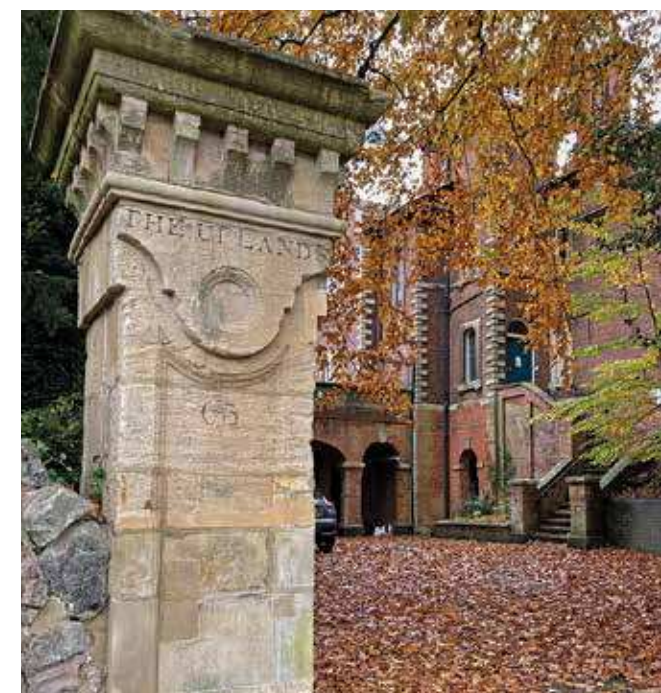
Currently available records begin in 1875, under Kings Norton Building Plans, and show that between 1875 and 1880 a total of 16 applications were made for the Estate, mostly for Oakfield Road and from 1881 to 1899 there were 14. The next decade 1900 to 1910 saw a slight increase in the overall numbers - 37 - and a change in emphasis on the roads being developed. Elmdon saw its first two applications, and a total of 19 were made for Selly Park Road. The vast majority

of dwellings on the Estate, the architects and builders were local, with most architects boasting City Centre addresses.

In 1912, the plans came under Birmingham rather than Kings Norton, with a dozen between 1912 and 1921. 1922 to 1926 saw a flurry of building, with 44 applications received. Greenland Road had its first three in 1921, when bungalows began to appear. 1927 to 1930 saw the highest annual number of applications until the end of the Second War, with a total of 52. There was an increase in multiple requests, made by developers rather than individual purchasers. Between 1931 and 1939, when 54 applications were made, multiple requests by the same builder were noticeable: in 1931, BBP52983 in Oakfield Road was for ten houses - the highest number seen thus far.



The Uplands, 65 Selly Park Road.





# Townscape character

## Building types

Detached and semi-detached residential or domestic dwelling houses are a defining characteristic of the area.

The earliest planning applications were exclusively for villas, residences, private houses or houses - the latter term being most used from the twentieth century onwards. The Dolphin covenants specifically prohibited more than two houses to be joined, hence the absence of any terraced housing.

There are good examples of other building types such as coach houses and these are distinctive features of the conservation area particularly on Oakfield Road, most are relatively intact and unchanged. Following the first war, applications are seen for 'motor houses', generally being described as 'temporary'. As motor cars tended to be longer than coaches, some coach houses acquired slightly clumsily extended frontages.

Garages can also be separate, as seen at Nos.4 and 6 Serpentine Road (BBP40079 31.7.1925) where the garages (rather than the houses) are semi-detached. By the 1930s, garages were being

incorporated into the overall design of some properties as seen at No.140 Selly Park Road (BBP58067A 30.05.1933) and No.37 Elmdon Road (BBP 71104 18.03.1938).

In addition to the houses are three churches: St. Stephens and St. Wulstans, St. Edward's RC Church (Raddlebarn Road), and Christchurch (Persnore Road). There is also a Primary School, a telephone exchange, and two electricity sub-stations. Frew Lodge in Oakfield Road is a purpose built block of nine residential flats for the elderly.

Other residential buildings have undergone varying degrees of conversion. St. Mary's Hospice in Raddlebarn Road was originally a late 19th century dwelling house called 'Woodville'. 'International House', now a hostel for international students in Oakfield Road is centred on Willowbrook built c.1878, with an additional modern wing fronting the street. Two former dwellings, now nursing

homes, of a similar date; Selly Park Nursing Home, with extensive additions along Oakfield Road to the original houses of c.1890, and Uplands Nursing Home, at No.43 Upland Road of around 1875.

## Architectural character

The juxtaposition of dates and thus styles of building is marked in Selly Park, resulting in a great variety of heights and spaces between buildings. There are relatively few runs of houses of the same style and date - and when this happens it can seem unusual - such as Oakfield Road's row of ten houses from 1931. More common is the grand mass represented by 63 (Camden House) with its separate stable block followed by two generous, but obviously much lower, bungalows from 1924, a similarly dated two-storey detached and rendered house, and the neighbouring three pairs of three storey Victorian Gothic houses, again with coach houses, dating to around 1870.

Large houses on generous plots were originally located at some distance from one another and when 21 applications were made between 1906 and 1908, this was the same number as had been made over the previous 14 years. The decades of design see a variety of styling details, but over the whole estate, building lines are very consistent, with no houses less than fifteen feet (as laid out in the covenants) from the pavement, with clearly defined front gardens and houses situated in generous grounds, again defined by the covenants' stricture that no plot be less than a quarter of an acre.



Camden House, 63 Oakfield Road.

## Building materials

Selly Park is constructed primarily of red brick, with blue brick and clay tile to provide colour and texture. While the early Gothic style houses made great use of patterned and turned woodwork, with barge-boarding cut with varying degrees of intricacy, and decorative finials on exaggeratedly pointed porches, both they, and the more restrained classical houses, had decorative friezes of brick at the eaves, with string courses of varying prominence, with stone, engineering brick and decorative red clay tile present. Carved wood columns support porch roofs on more modest and later villas in Bournbrook Road (No.83).

Some of the larger houses have decorative stonework such as No.76 Oakfield which has stone bays, lintels, and crenelation above the front door and decorated capitals to the fine pillars in the doorway.

Roofs are of primarily of slate or clay tiles, with pantiles appearing in the 20th century. Some slate roofs of the 1870s also incorporated rows of scalloped tiles, often echoed above their bay windows. Some decorative ridge tiles can still be seen with examples at Nos.107 and 144 Oakfield. A number of chimney stacks appear to have retained their original clay pots and glazed tiles can be seen decorating door surrounds at Nos.133-157 Selly Park Road while decorative Terracotta tiles form a string course at No.34 Oakfield.

By the beginning of the 20th century there is a use of smooth or roughcast rendering to cover either the whole or part of an elevation, or to define an architectural element.

Tiles are used sideways on to demarcate arches above doorways or provide decorative detail in the gable wall. In other examples blue bricks are used between upper and lower storeys echoing Tudor diaper patterns such as is seen at No.140 Selly Park Road and examples of the use of half-timbering, another Tudor reference, can be seen at No.127 Selly Park Road

Most gate piers are brick surmounted with stone, although Allestree (No.107 Oakfield) has stone piers and the imposing stone gateposts for The Uplands, 63 Selly Park Road survive.

Some stained glass can be found in Serpentine Road, at the porch of 21 Serpentine Road, at Uplands Nursing Home and in the 1930s houses on Eastern Road. Small circular windows become a decorative feature in the 1930s, to be seen neatly encircled by red bricks on a rendered facade or below the window next to the front door (Nos.84 and 86 Oakfield).



76 Oakfield Road.



Height and scale

Development in the Conservation Area has been almost exclusively domestic, with houses generally between two and three storeys in height. The three storey Victorian Gothic houses of the 1870s, with their sharply pitched roofs, contrast with the more classically conceived

two storey villas of the same date in Oakfield Road, while both have coach houses and occupy the same footprint. Bungalows appeared from the 1920s onward and with plot sizes are of a regular width they appear more spaciouly sited alongside neighbouring four or five bedroom houses.



34 Oakfield Road.



122 Selly Park Road.

Street pattern

Bournbrook, Raddlebarn and Warwards Lane, which link Bristol and Pershore Roads, are probably the oldest roads. Other streets were laid out at the time of the original Building Plan, which finds the church at the highest point, with Serpentine, Elmdon, Selly Wick, and two lengths of Selly Park Road radiating from this central point. The area is roughly triangular, with Oakfield providing the top, widest edge, and Pershore and Bournbrook Roads to the sides, however any attempt at geometric analogy breaks down from that point. The roads are generally wider than would be expected in a Birmingham suburb, while the number of sections of roads with houses on one side adds to a sense of spaciousness.

Open spaces

Among the most positive features of Selly Park are the open spaces, woodland and lakes provided by the Recreation Ground, Elmdon Road playing field, the grounds of the Convent of St Paul and the lakes at Southbourne Close and in the grounds of Cleeve House (No.34 Kensington Road).

Paving street furniture and monuments.

Street surfaces provide an appropriately neutral and subordinate foreground to building, being either grey, buff and pink paving slabs, or asphalt and mainly granite kerbstones.

Street furniture in the area consists almost entirely of standard designs. Lighting columns are functional and unobtrusive, in the standard LED format introduced by Amey in the last few years. Street name signs are a mix of standard aluminium plates and the historic cast iron plates used by the Council at the beginning of the last century. There is a 'Lych Gate' at St. Stephens, added in 1924 in memory of a church warden.

Trees

More than twenty Tree Preservation Orders have been issued in the Conservation Area, with seven in Upland Road alone - including a Monkey Puzzle at No.51.

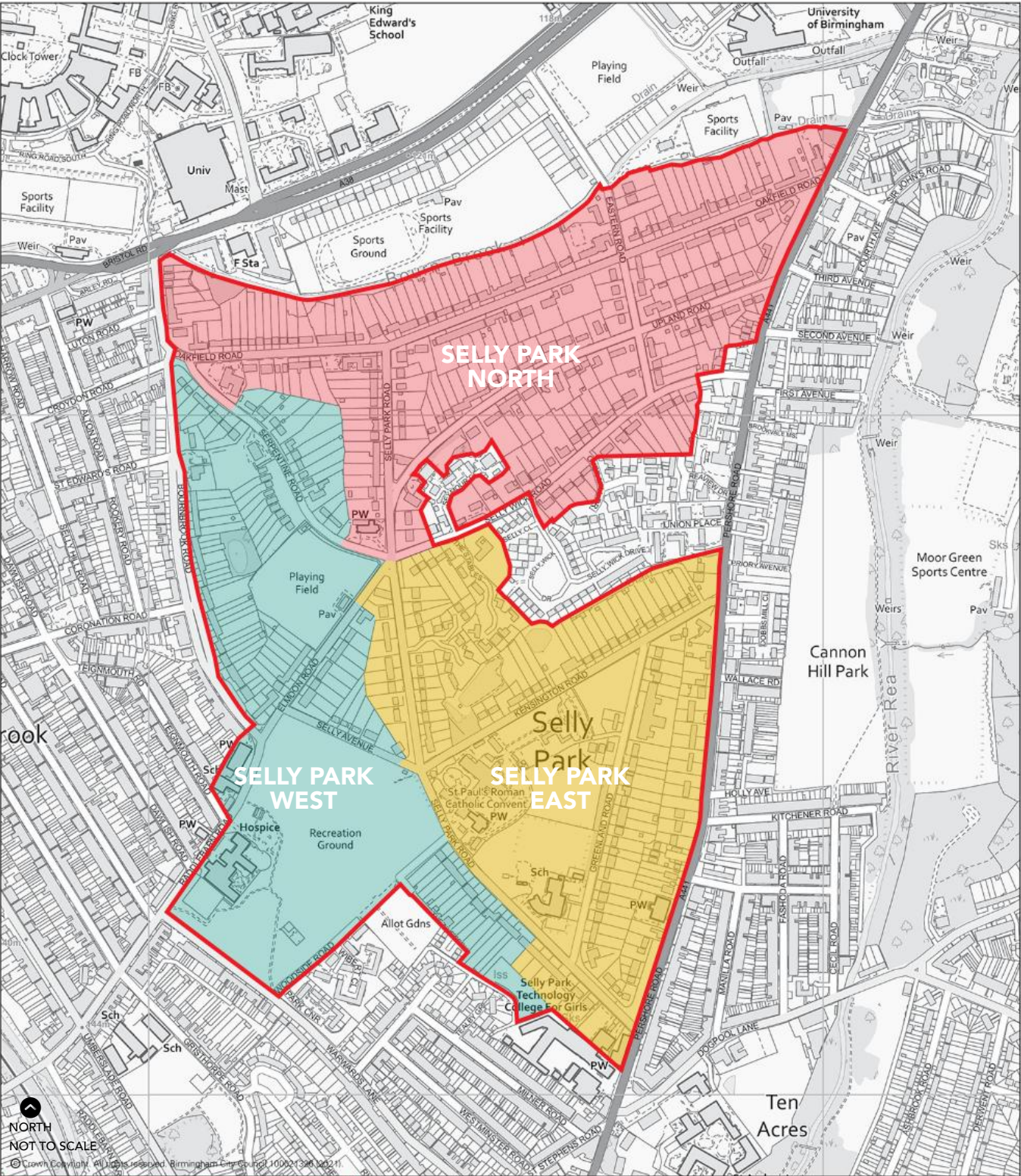
Three types of Cedar can be found; Deodar, Western Blue and Lebanon. There is a site of local importance for nature conservation at the corner of Kensington and Selly Park with many oaks, as well as tall beeches at the top of Kensington Road plus flowering cherry and Rowan trees on both sides. Large Copper Beeches, Horse Chestnuts and Magnolias, can be found in Oakfield Road, and a mature Red Oak at the Telephone Exchange. Serpentine Road boasts a large Fern-Leaf Beech (*Fagus sylvaticus cvAsplenifolia*) in the grounds of Beechenhurst, while the open landscaped grassed area fronting the Maxim houses has mature trees showing the old hedge line.

In Selly Avenue, bordering on the Recreation Ground, there are two *Acer campestre* 'Elegant'; one *Acer pseudoplatinus*, one *Alnus glutinosa*; one *Corylus columna*; five *Fraxinus excelsior*; ten *Malus* spp.; four *Prunus serrulata*; one *Pyrus calleryana* 'Chanticleer'; four *Sorbus Aria*; and a *Sorbus aucuparia*.



34 Oakfield Road.





Plan 3  
Selly Park Conservation Area Character Areas.

Selly Park North

Comprising: Oakfield Road/ Eastern Road/Upland Road/Selly Park Road's North section (church to Oakfield)/Selly Wick Road.

This character area is the earliest and most built up, comprising the roads in which the earliest building developments took place, with housing primarily dating from the 1870s onwards. An overarching characteristic of all areas is that almost without exception the plot sizes are fixed and generous, being no less than a quarter of an acre, for reasons outlined in the Development History.

Oakfield Road

Oakfield Road saw the start of the growth of Selly Park, and immediately demonstrates contrasting architectural tastes and styles, as well as a range of dates of construction along its relatively flat, straight, length. Breaks in the skyline are created by varying heights of buildings with areas of open spaces adjacent to larger buildings creating a feeling of openness.

The earliest houses include Penryn and Seton (Nos.94 and 96), previously known as Oakfield Place, and The Laurels and the Hollies (Nos.37 and 39). The latter are classically proportioned two storey dwellings with shallowly pitched roofs parallel to the road, central doorways flanked by pairs of rectangular sashed windows all with bracketed hoods, with a prominent string course, and an arched window above the front door.

In contrast the three-storeyed Fairbridge Villa (No.79), constructed by 1868, demonstrates the popular Gothic style of mid-19th century with a far more steeply pitched roof, asymmetry, and decorative brickwork among its detailing. The 1871 Census attests the presence of the run of semi-detached Gothic style houses Nos.79-81, 83-85, 87-89 and the detached No.91.

Opposing sides of the road provide excellent examples of both styles. From Pershore Road The Ferneries (No.21 built 1879), the Laurels and The Hollies (mid 1800s) on the south side are echoed on the North side by Nos.10 and 12. After Eastern Road the great bulk of Camden House (No.63) continues the plainer, more austere classicism, perhaps a little relieved by the

squared bays on the ground floor, with a wall which runs along to a separate coach house. Nos.72 and 74 echo the plainer classicism and both have unaltered coach houses. The coach houses are an important and distinctive feature of Oakfield Road, which boasts the largest number on the estate. On the other side, past Selly Park Road, plans in the Birmingham Archives (KN136) show designs for Nos.97, 99 and 101 submitted in 1877 which continue the Gothic style. The wooden finials above the porch and on the gable above are still intact. Baden House at No.34 Oakfield Road, constructed c.1900, has a gable with mock-Tudor framing above casement windows with divided top sections and frames protruding, and a terracotta tiled string course.



37 Oakfield Road.



Applications to build begin to increase between 1921 and 1930 and for the first time bungalows are planned - the first three being in Oakfield Road. No.36 Oakfield (BP 33579 1922) is an unusually unaltered example of the beginning of the post-war boom with its plain, pebble dashed exterior and prominent mock-Tudor gable end above a three-paned oriel window.

By the 1930s multiple applications for permission to build from developers become the norm. The highest number on the estate is found in Oakfield Road (BBP 52983). Very similar in design, they are all detached, with catslide roofs running down to the level of the front doors with a single double bay rising right or left, and a small dormer above the front porch. Many have been extended with



83 Oakfield Road.



97, 99 and 101 Oakfield Road.

varying degrees of sensitivity to the original design.

There have been two substantial, contemporary homes built close to the beginning of Selly Park Road, both are generous in scale, two storeyed, cleanly designed with uncluttered detailing. Designed by Sjölander da Cruz in 2010, No.102's front elevation was carefully designed to respond to the street scene and adjacent buildings, with two main blocks of varying heights set back from the road.

**Eastern Road**

Straight and wide, Eastern Road links Selly Wick Road to Bristol Road, crossing Upland and Oakfield Road. Nos.2, 4 and 6 are the first houses built in 1875 for H.W.Rollason: Teddington, Fairfield and Lynton in red brick with decorative brick string courses, one being detached the othertwo semi-detached.

The neighbouring properties are semi-detached Edwardian, an application KNN1499 being made in 1903 for Wayside and Aryville, which became Nos.10 and 12. Detailing includes oriel windows, brick finish below and rendered above, and wide bays at ground level.

Of the four houses built between Upland Road and Oakfield Road in 1936, (Nos.21 to 27 - BBP67310) two still retain some original stained glass in their attractively surrounded front doors, No.21 with a definitely Art Deco feel.

**Upland Road**

There is a gentle curve to Upland Road which becomes more pronounced as it rises towards Selly Park Road. No.28, Avon Lodge c.1870, has many interesting details including sharply pitched roofs, Gothic style window detailing on the first floor, and well delineated

string course. Further up the road is No.43, also of c.1870. Now Uplands Nursing Home the building has a Gothic arch above the front door and windows displaying a mixture of curved and straight detailing above the sashes, with a mix of plaster and brick decoration.

1880 saw the appearance of the half-timbered No.49 with unusual plaster detailing in the gable of the front porch. In contrast, No.44 Upland Road was designed by Harry Harper of Clifford, Tee & Gale, architect of the Friend's Meeting House in Cotteridge (Pevsner Birmingham p.268) and is discreetly screened by laurel hedges with only the first floor visible.

Further up the hill, and boasting a mature Monkey Puzzle, the plans for No.51 (BBP64426) were lodged in 1935, and the house has retained much original detailing. The rendered two-storey front has a slight Dutch flare to the lower roof sections which join a cat-slide main roof pierced by two dormer windows. The front door has a brick surround, with tall narrow windows on either side echoed by a further three to the left. Importantly, the garden contains remnants of The Uplands' extensive water gardens.

At the top of the road is Copperfield House, No.60, which was built in 1861 for jeweller William Rolason. Another Gothic style red brick villa, it has been extremely well renovated, having been returned to private ownership after many years as a hotel. Dark engineering brick walls finished with large coping stones enclose the gardens, lower in height in Selly Park Road than in Upland. The Uplands, at No.65 (see Townscape character) has distinctive walls which differ from all others in the area, being of great height and of unusual boulder-like composition.



102 Oakfield Road.



10 and 12 Eastern Road.



Avon Lodge, 28 Upland Road.





60 Upland Road.



34 Selly Wick Road.

**Selly Wick Road**

Selly Wick Road has a rising curve from Pershore Road up to Selly Park Road. Just round the corner from Eastern Road's run of three c.1875 houses is Florence Villa (No.15), a traditional mid-Victorian detached house with a double height bay on the three storey section, and a stable block in excellent condition.

*Birmingham's Victorian and Edwardian Architects* (p.247) lists Domestic works done by Cossins, Peacock and Bewlay including '1895 Vicarage, The Brooklands, No.34 Selly Wick Road'. The former vicarage has a plaque (not visible from the road) recording the laying of the foundation stone by the Bishop of Worcester's daughter and its shallow roof and deep eaves evidence of an emerging new era of design.

The Arts and Crafts style is well represented by No.21 Selly Wick Road, which has 1908 on its drain hopper, another relatively un-spoilt example of a rendered building, boasting a pair of 'Tudor' style chimneys next to its half-timbered gable.

No.46 bears a strong resemblance to plans lodged in 1926 by Tanner & Horsfield of Livery Street, (BBP41652) particularly in terms of the front door, with its arched canopy and the echoing arched window above. The chimney stacks, unusual in the area, seem to have retained their original impressive height as does No.39, plans for which were lodged in 1925 (BBP 40601) and clearly showing the delightful shell canopy above the front door.

Boscobel, No.48 from 1913 is now Grade II listed, while No.54 has recently been rescued from decline. BBP43707 was lodged for it in 1927, and it retains spacious grounds, significant outbuildings and a curved wall in Seymour Close.

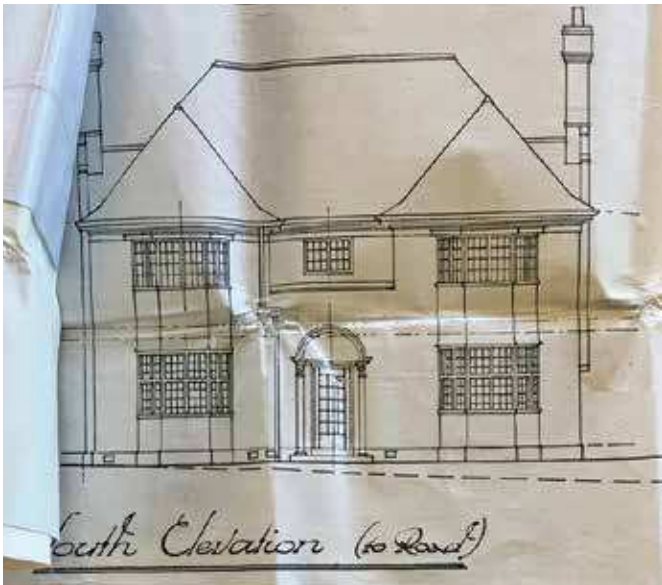
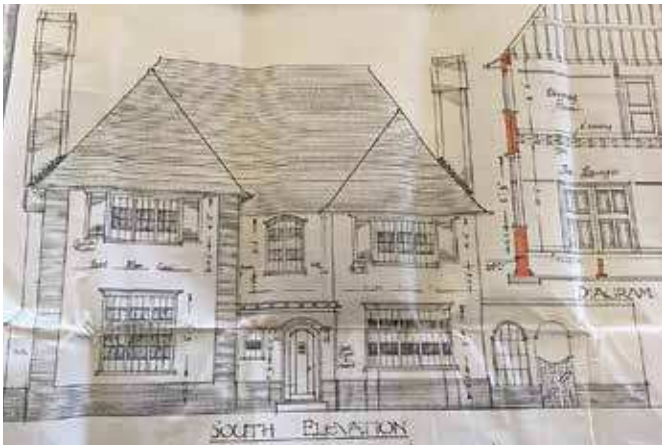
Selly Wick House (see Development History), was on the 1835 sale plan. Its listing describes it as "circa 1840 though of possibly late 18th century origin. "Set back from the road, this family home with its elegantly rendered façade is barely visible from the road.



46 Selly Wick Road.



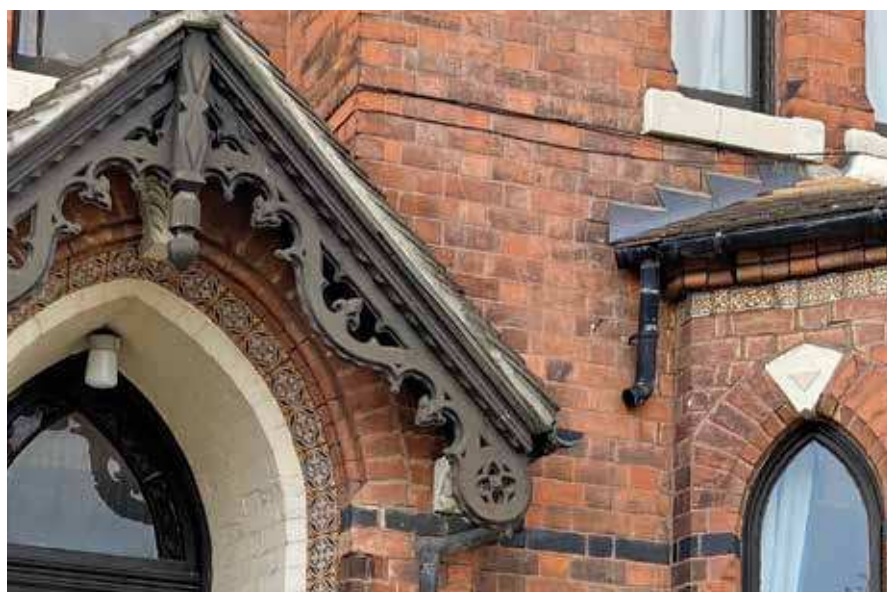
30 Selly Wick Road.







157 Selly Park Road.



157 Selly Park Road.



198 Selly Park Road.

### Selly Park Road North Section

Selly Park Road rises straight and broad from its junction with Oakfield Road, with trees planted in the grassed section of the pavement on the left, and some splendid glimpses of trees once in the grounds of Highfield (see Development history). On the right, the 1890s semi-detached houses by Leytonstone & Rayleigh (Nos.157 and 155) are now in use as a nursing home. The building(s) retain many attractive Victorian details with groups of three lancet windows as well as a pair of barge-boarded porches with encaustic tile surrounds, echoed at roof level with small bands of these tiles decorating the heads of the windows.

The double-fronted, three-storeyed Hazelwood, conveyed C1869, is in red brick with two steeply gabled roofs and porch that have relatively restrained barge-boarding enlivened with elegant plaster ogee arches above the first floor Gothic arched windows that rise above one flat and one curved bay. There are Minton tiles in the porch, stained glass and the ridge tiles remain above the scalloped effect of the tiled roofs.

Westover (No.198), is a fine example of an Edwardian Arts & Crafts house. Designed by William James Davis in 1902, the asymmetric red-brick dwelling has an unusual porch, its brick base surmounted with square timber arcaded columns. To the left there is an equally unusual feature: a polygonal tower with a cupola roof.

No.196, next to Westover, was designed in 2008, the design echoing the quality of the neighbouring house. A substantial three storey house the building has ground floor bays on either side of gabled porch with first and second storey windows below steep front facing gables. To the side are gently arched paired garage doors.

This character area also includes St. Stephens Church (see Development History).

### Selly Park West

**Comprising: Serpentine Road/ Bournbrook Road/Elmdon Road/ Raddlebarn Road/Selly Park Road south section/Selly Avenue.**

This character area is defined by the large number of open spaces and notable Arts and Crafts architecture. In this part of Selly Park areas of public open spaces are characteristic with the playing fields on Elmdon Road, and the extensive recreation grounds surrounding the Hospice. Only one recently built house in Bournbrook Road falls into the Conservation Area.

### Serpentine Road

Running down from the side of the Church is Serpentine Road, which makes a triangle of the bottom of Oakfield Road and the first section of Selly Park Road. While Oakfield Road is wide, fairly straight and flat, Serpentine Road provides a great contrast, curving down from the Church at the highest point in the estate, to join Oakfield and Bournbrook Roads at the lowest with fine examples of architectural design from the 1870s to the present day. The first large family home, Beechenhurst, is currently undergoing repair as part of an approved development and the later houses remain in good condition.

At the Bournbrook/Oakfield Road end is No.3, Fairfield c.1890, which echoes the plainer styles seen in Oakfield Road twenty years earlier, contrasting with the four substantial villas of 1884-90 which are three storied with double fronts at Nos.7 and 9 and Nos.17 and 19 which have double bays rising to roof level with stone lintels above the windows. All have gabled porches retaining their decorative ridge tiles.

Further up the hill, 1884 saw application KN689 for an even larger villa with many revival style features, including a splendid chimney rising above a third floor timbered gable.

In 1925, plans for two dwellings with garages were made. The resulting houses Nos.4 and 6 remain very close to their original design with their garages joined and porch lines rising to the front roof with asymmetric windows in the roof line behind. Three sympathetic new detached houses have been built beside them, echoing without parodying their detailing.

An earlier development on the same side was produced by Maxim Estates in the 1970s. A row of

eight detached houses Nos.30 to 46, all with garages to the front, have varying styles with pitched roofs, sand-faced tiling, facing brickwork and decorative cladding, some called the 'Burlington'. The houses are set well back and have generous unbroken front lawns to the pavement, adding to the spaciousness of their setting.

Past the Maxim houses, the right-hand side of the road is taken up by the playing fields fronting on to Elmdon Road, well screened by trees and shrubbery.



8a and 6 Serpentine Road.



34 Serpentine Road.



### Elmdon Road

Elmdon Road is unusual in that it is mostly built on one side, the playing fields take up more than half of the north-east side of the road with only a handful of houses directly opposite. No.2 is only one room deep, of the plainer Victorian style, double-fronted red brick construction with string course, a good porch and triple square-headed windows to the first floor.

Nos.12 (BBP38041), 14 and 16 date from the 1920s (BBP33984), while 1938 sees the beginning of development on the opposite side of the road.

The last two houses on the north-east side look out over the Recreation Grounds towards the Convent. Elmdon Road then becomes Raddlebarn Road with St. Edwards Church occupying the last section of the north-east side of the Selly Park Conservation Area.

Only one building occupies the wide open stretch of the Selly Park

Recreation Ground: 'Woodville' is named on the 1884 O.S. map, next to Raddlebarn Farm and was opened as St Mary's Hospice in July 1979.

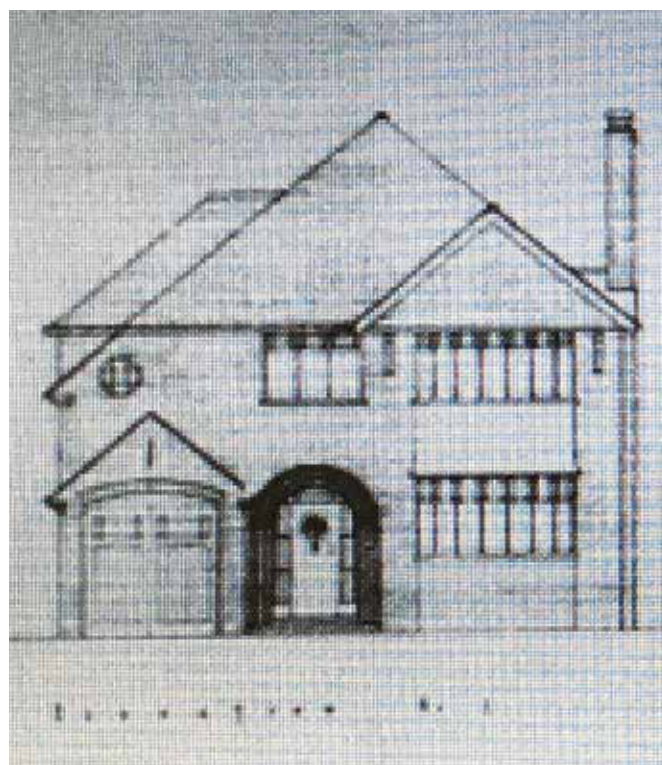
### Selly Avenue

Running south East from Elmdon Road is Selly Avenue, mostly remarkable for its clear view across the Selly Park Recreation Ground through an impressive range of street trees in Selly Avenue. Bordering on the Recreation Ground are two Acer campestre 'Elegant'; one Acer pseudoplatinus, one Alnus glutinosa; one Corylus columnna; five Fraxinus excelsior; ten Malus spp.; four Prunus serrulata; one Pyrus calleryana 'Chanticleer'; four Sorbus Aria; and a Sorbus aucuparia.

The origins of No.15 are unclear. While builder W & E McDonald made applications for the remaining five, two detached between 1927 and 1929 and No.1, a semi-detached dwelling joined to No.87 Selly Park Road.



37 Elmdon Road.



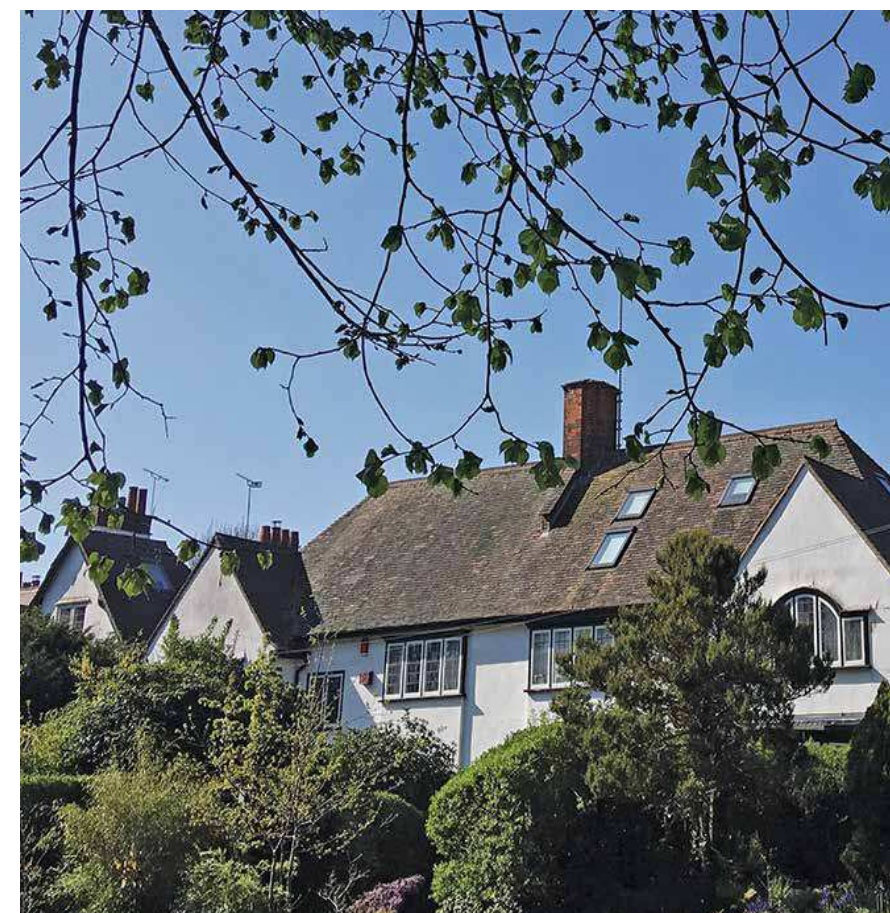
### Selly Park Road South Section

The gradual development of the southern section of Selly Park Road below the Recreation Ground continued with a notable cluster of ten Arts and Crafts houses. Designed by Owen Parsons, Nos.47 to 65 were built for Carr & Leyton in 1906 and 1907 and employ on a small scale Parsons' typical Arts and Crafts vocabulary. The houses are L-shaped, semi-detached houses and Parsons combines three storey end gables with long low roofs. Details include tile hanging and half timbering or smooth white plaster with decorative central motifs to the gable ends. With Arts and Crafts porches, sometimes in the angle of the L, simple small-paned windows and tall chimney stacks ('Birmingham's Victorian and Edwardian Architects' No.59 pictured) the houses benefited from being opposite the walls of the Convent, with no houses between it and Greenland Road.

The neighbouring houses, built twenty years later, are at a more modest scale with roughcast and timber elements.



View from Selly Avenue.



59 Selly Park Road.



Selly Park East

Comprising: Selly Park Road (Central section)/The Convent and grounds/Kensington Road/Greenland Road/Pershore Road.

This character area is characterized by secret green spaces and early 20th century, Bauhaus inspired architecture. The Bauhaus architecture found in this part of Selly Park neighbours the grade II Listed Convent of St Paul (see

Development history). Most of the numerous green spaces in this area are enclosed, The Convent and grounds of St.Edwards school encircled by walls and metal fencing, the latter well hidden by the mixed hedging now almost engulfing them. The remains of an old orchard can be glimpsed from Kensington and Greenland Road, and, guarded by gates, Southbourne Close leads to a Site of Local Interest for Nature Conservation.



Southbourne Close, stone gate piers on Selly Park Road.



Selly Park Road from Kensington Road/Selly Avenue.

Selly Park Central Section (corner of Elmdon Road to Selly Avenue)

Backing on to Elmdon Road is the central section of Selly Park Road, running from Selly Wick Road to Kensington Road. Planning applications demonstrate that the Elmdon side of the road from No. 105 onwards was developed first with Nos.97 and 95 in 1925, and Nos.91, 89 and 87 in 1927.

The Mount (No.105) dates to 1905-10 and is unusually sited at an angle to both roads. Subsequent houses were set above the road level to begin with from 1925 onwards, with bungalows interspersed between large family homes, all set well back from a wide road that sweeps gently down towards the Convent and the open space of the recreation ground opposite it.

On the east side of the road, applications to build in 1933 were on a much grander scale than those in Elmdon Road, (No.126 left and No.122 right). All twelve houses between Kensington and Selly Wick Roads were built between 1933 and 1940.

The road is wide and the houses set well back with a variety of detailing from render with plain brick lintels, or red brick throughout with blue brick decoration. It is notable that the original garage doors remain in Nos.122, 126, 140 and 142.

Imposing gateposts are the only remaining structures of Highfield House and lead through modern gates between Nos.140 and 125 Selly Park Road to Southbourne Close.

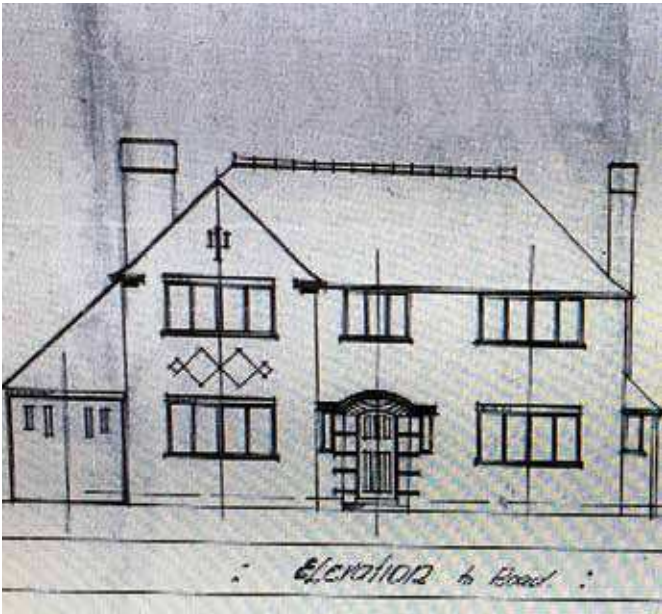
The grounds of Highfield House are within the Conservation Area and include extensive woodland which borders the first 100 metres of Kensington Road and are designated as a Site of Local Importance for Nature Conservation (SLINC). The SLINC comprises land surrounding a large lake once in the grounds of Highfield (See earlier ref). The gates prevent general public access.



Southbourne Close, the lake.



140 Selly Park Road.







34 Kensington Road.



32 Kensington Road.



40 Kensington Road.

### Kensington Road

At the Selly Park Road end, the north side of Kensington Road backs on to a lake fed by a spring which flows through a series of ponds (see Appendix D) in their back gardens to join the lake in the extensive grounds of No.34; Cleeve House (BBP68597 from 1937: Architect J.P.Osbourne). The dwelling is a locally listed mid-20th century dwelling and it has two gable features and bay windows to the front. The external appearance of the dwelling consists of tile hanging and brick. Of earlier interest, probably KN1501 in 1892, is No.32 Kensington Road. A Victorian style three storey detached dwelling house constructed of solid brickwork which is part rendered to an upper projecting gable. The roof is of traditional pitched and hipped design with clay tiles. On the opposite side, Kensington Road's houses face the Convent grounds (as does the entirety of Selly Park Road from Kensington to Greenland Road).

One of the most interesting architectural developments in the area saw plans lodged in April 1930 to build five dwelling houses, Nos.36, 38, 40, 42 and 44 Kensington Road, in a style known as Bauhaus. Between 1919 and 1933 Walter Gropius in Germany inspired an architecture aimed at pared-down, uncluttered elegance, and the use of modern materials. No.40 bears closest resemblance to the original drawing and is one of four to have retained their flat roof. No.44 was extended and restored in 2016 with considerable attention to retaining the original style and materials.

(It should be remarked that these are not the only architecturally interesting buildings in the road. In 1920, The National Welsh slate quarries put in block plans to build fifteen bungalows. Twelve of these remain in Kensington Road, while two can be found on Pershore Road. They are not, however, included in the Conservation Area.)

Kensington Road benefits greatly from being built on one side only, with a straight gentle rise from Pershore Road to the Convent, with a view across to Cannon Hill Park to the east. There are numerous street trees, with behind them the walls of the Convent.

### Greenland Road

The western side of Greenland Road is formed primarily of the grounds of the Convent, on which the St. Edward's Primary school was built in the late 1960s. Further development has begun at the Kensington Road end, with three houses completed so far, but the grounds remain extensive, with good hedges, and mature trees such as Copper Beech.

A significant dwelling of around 1870 has recently been extensively renovated. Greenland House at

No.22 is double fronted, with a separate coach house, brick and plaster detailing, deep bays and, unusually, three arched casement windows on the first floor. In contrast, Neville Williams House is a purpose built nursing home. However, its long, shallowly-pitched roof pierced by gables of differing heights, deep eaves, and gradual drop below road level, makes it less obtrusive.

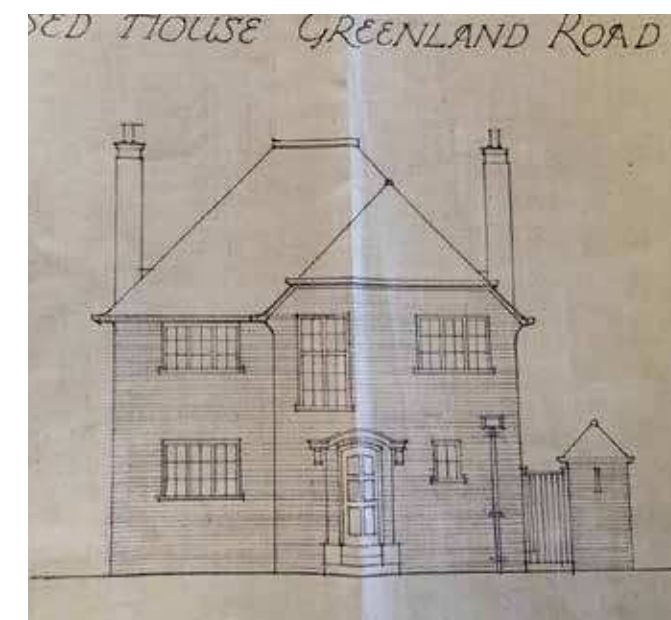
The remaining houses, a mixture of bungalows and two storey houses, are situated on the east side of the road facing the school and convent grounds, and were built in the 1920s and 30s. Many retain original design details of those periods. And the bungalows, like others on the Estate, benefit from being situated on plots of a similar width to their neighbouring houses.



Greenland House, 22 Greenland Road.



26 Greenland Road.





Pershore Road

Pershore Road is a busy main thoroughfare, and the houses which have been included in the Conservation Area, on the West side of the road, contrast both in variety and setting. All are set back, on wide, deep, plots, backing on to the equally long gardens and similarly sized plots of Greenland Road. As with the rest of the Conservation Area buildings cover a wide range of dates.

The 1840s saw the appearance of Nos.929 and 927 and 921 and 923, which are Listed (SP 08 SE12/42 II GV 2). A further three similar pairs of Grade II semi-detached two storey six bay villas are to be found on the same side, included in the Conservation Area. They are 667 and 665, 679 and 681 (NGR:SP 05 86783040) and 683 and 685.

By the time of publication of the second O.S. map of the area in 1904, three more sets of dwellings had appeared. Nos.793 and 795 return to three storeys of a more Gothicised design. Semi-detached, one with coach house attached, the other with a separate structure.

There are single dormers in the roof, and equally steeply roofed porches. They are next to No.785, Kensington Hotel, which is angled between Pershore and Kensington Roads, of similar design - but retaining finials on three out of the four steep gables to house and inset in the roof, and intact barge-boarding. There is one coach-house remaining also exhibiting a finial on its steep roof.

While not appearing on the 1904 O.S. map, No.807 is clearly Victorian, and appears in Kelly's in 1890 as The Beeches. Rendered, with three storey, double-bays, its three gabled dormers in the roof have curved barge-boarding. There's decorative brickwork below the roofline, and figured plaster keystones above the three arched first floor windows as well as the porch. Also of the same period is No.805 next door, with a shallower pitch to its lower roof. It is all brick, with decorative brick detailing both below the roof-line, and forming three string-courses. The steeply gabled porch has intricate barge-boarding and there is a coach-house to the side.

By the 1920s, further building has taken place, with semi-detached villas Nos.873 and 875 exhibiting some Arts and Crafts influences in the mixture of white rendered, fairly steep gables of different heights, some half-timbering as do Nos.841 and 843 and Nos.827 and 829. Very wide with five bedroom windows to the upper floor, No.829 is rendered with a good porch that has Arts and Crafts window detailing with lights to front and side.

Harder to date, and not appearing in the 1923 edition of Kelly's, No.961 is an early double bayed brick bungalow. The front door is set in a brickwork surround, pierced by a circular geometric leaf patterned window surmounted by a semicircular arch with concave wings.

The third of the churches in the C.A. is at No.953. Christ Church, built in 2008, has modern clean lines, with a shallowly gabled front porch extending below a wide, tiled roof.



785 Pershore Road and Coach House.



961 Pershore Road.



953 Pershore Road.

# Pressures on the Conservation Area

Selly Park has retained its characteristic low density, spacious houses, gardens and tree-lined roads. New houses respecting the provisions of the covenants have been built in Bournbrook, Serpentine and Eastern Roads.

The Conservation Area is coming under increasing pressure from the effects of developments in the surrounding area: the expansion of the University of Birmingham, the increasingly dense occupation of the Bournbrook area, purpose built student accommodation, the expansion of the Queen Elizabeth Hospital, the dental hospital opened in 2018, new private hospitals and care homes. Being close to these developments and between two major arterial roads, Selly Park is particularly exposed to the general growth of traffic, and the opportunity taken by some to use the roads of Selly Park for parking.

Selly Park provides a housing stock that is suitable for large families, however the presence of very large Victorian and Edwardian buildings makes the area vulnerable to conversion to institutional uses and subsequent expansion.

Examples can be seen at the Uplands Nursing Home in Uplands Road, the Selly Park Care Home in Oakfield Road, and the Beechenhurst student hall in Serpentine Road which have all been expanded through the construction of extensions. There are some examples of side and rear extensions to residential properties which incrementally can impact on the character and appearance of the Conservation Area through loss of space and green areas between buildings.

Modernization or extension of houses often introduces changes to the design and fabric of buildings, to windows, as well as to garden walls and fences. Conservation area status and Article 4 Directions allow the local planning authority to resist uncharacteristic alterations and manage change. In some cases there is an inherited problem of inappropriate past conversions as well as of changes undertaken without permission.

Pershore Road has a concentration of houses in multiple occupation many of which have been subject to inappropriate alterations to the structure and features of buildings. The large majority of those that are on the City Council's registered list of Houses in Multiple Occupation (HMOs) are on the East-side of Pershore Road outside of the Selly Park Conservation Area.

However, HMOs exist on the West-side of Pershore Road and other streets that are within the Conservation Area; some of these are not officially listed or licensed. While the Article 4(1) Direction on HMOs has offered a useful curb, it cannot be fully effective unless these buildings are fully licensed.

Similar pressures exist in Bournbrook Road. The inclusion of the east side of Bournbrook Road in the Conservation Area will now allow for better management to address the noticeable decline of family accommodation in these

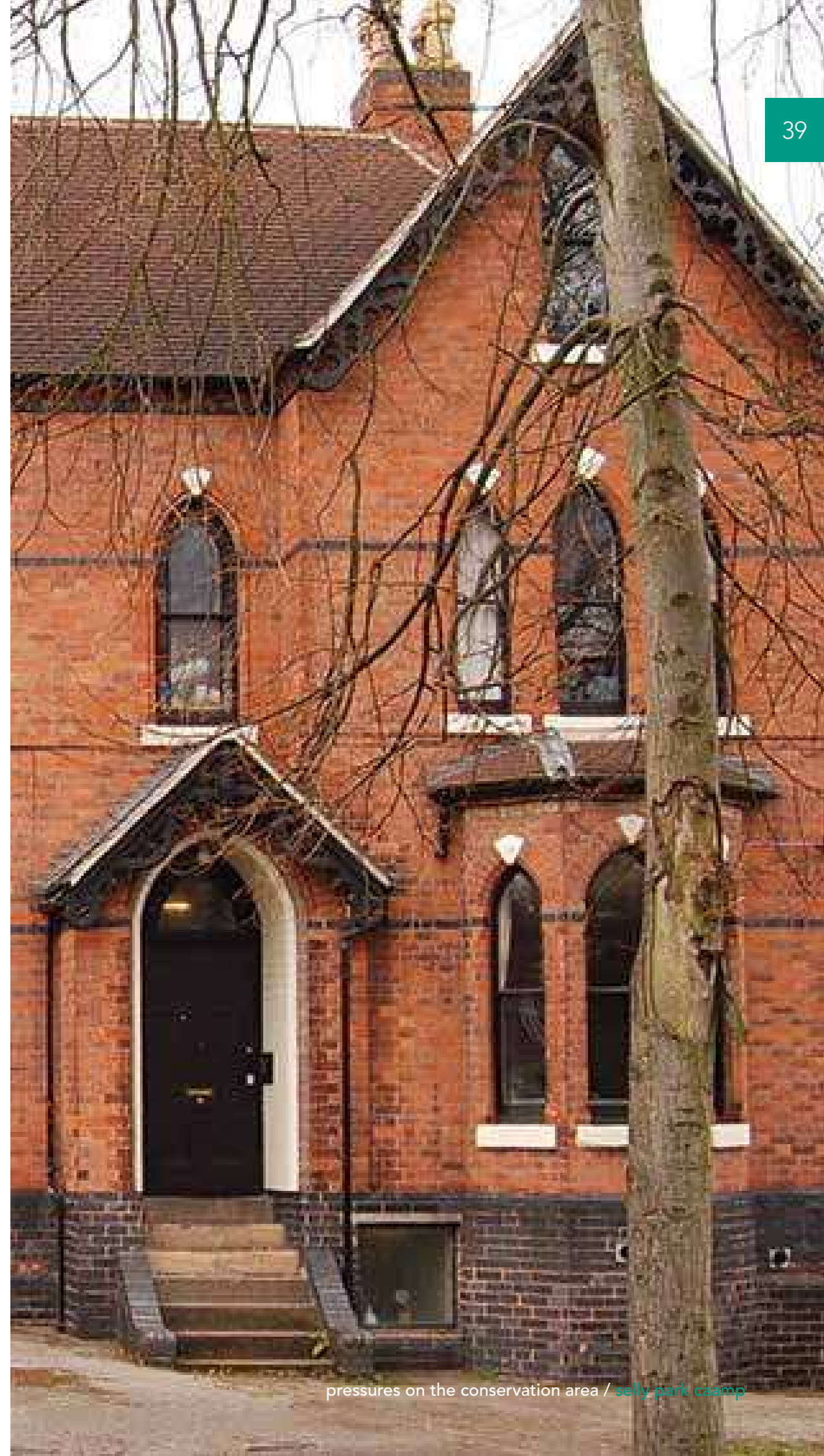
detached and semi-detached inter-war buildings.

Gardens and road-side trees in the Conservation Area make an important contribution to its appearance as well as to biodiversity and the reduction of air pollution. Most houses have off-street drives and garages, which restrains the trend to the removal of garden walls and paving of front gardens for parking.

However, pressures of car parking by people working, studying and living nearby have grown immensely in recent years, detracting from the character of the Conservation Area - particularly in Bournbrook Road and Oakfield Road and many of Selly Park's roads are now solidly parked on both sides throughout the day.

Associated pressures are the increase in the volume of traffic and the associated noise and air pollution within the Conservation Area and along the surrounding arterial roads.

A collateral effect of private and public works within and surrounding the Conservation Area is damage to roads and pavements by infrastructure companies.







Selly Park Conservation Area

PART 2

**MANAGEMENT PLAN**



Policy guidance

This guidance has been prepared in accordance with the National Planning Policy Framework (2019) and Planning Practice Guidance: conserving and enhancing the historic environment (2014).

It follows the advice set out in Conservation Area Designation, Appraisal and Management: Historic England Advice Note 1 (2016), and the City Council's Design Supplementary Planning Document (2019).

These policies should also be read in conjunction with the Birmingham Development Plan (2017) especially Policy TP12 Historic Environment, the Wider Selly Oak SPD (2015), and the Mature Suburbs Guidelines SPD (2008) (see Appendix B). In making proposals for development, applicants must have regard to the information contained in these documents.

**Additions and alterations**

The definition of a conservation area is that it "is an area of special architectural and historic interest, the character and appearance of which it is desirable to preserve or enhance" (Planning (Listed Buildings and Conservation Areas) Act 1990. There is therefore a presumption against additions and alterations to buildings that adversely affect their character and appearance, particularly their front or publically visible elevations, and that of the Conservation Area.

Proposals should ensure that additions or alterations to existing buildings have a positive effect on their character and that of the Conservation Area. The Council will ensure that all additions and alterations are sympathetic to the existing building in scale, proportion, design, materials and detailing.

The removal or masking of historic architectural details and/or architectural elements will not be permitted. Where appropriate the Council will expect hidden, damaged or missing architectural details and/or elements to be accurately reinstated.

Where significant alterations and/or additions are proposed the Council will require designs to be submitted in detail. It should include an analysis of the contribution made by the existing building to the character of the immediate streetscape and the wider Conservation Area and of the preservation or enhancement of that character by the proposed additions and/or alterations.

**Planning permission**

There will be a presumption in favour of retaining buildings that make a positive contribution to the character or appearance of the Conservation Area. This will include buildings of contextual or group value.

Where the demolition of a building that makes little or no contribution to the character of the Conservation Area is proposed, the Council will expect the developer to justify demolition in terms of the character of the Conservation Area and to submit detailed plans for redevelopment. Such plans should demonstrate how they preserve or enhance the character of the Conservation Area. In the absence of satisfactory proposals, consent for demolition will not be granted.

**Recording**

Where consent is granted for significant demolition the Council will expect an accurate archive record to be made prior to the commencement of any works. This will include photographs and/or where appropriate, measured survey drawings which will be provided at the expense of the applicant. The outcome of this work will be provided to the Council and will be submitted to the Birmingham Historic Environment Record.

**Change of use**

The Council will not permit changes of use to buildings where the new use would adversely affect their character and appearance or that of the Conservation Area. Change of use can, however, lead to the enhancement of the character and appearance of the Conservation Area. For example, Copperfield House was restored and returned to residential use after having been converted into a hotel.

**Maintenance of historic plot boundaries**

The historic pattern of plot boundaries should be respected. The Council will resist the removal of boundaries and the amalgamation or sub-division of plots.

**Boundary treatments**

There will be a presumption in favour of retaining traditional boundary treatments such as sandstone or limestone walls,

iron railings and iron or wooden gates. The Council will always encourage appropriate repair and reinstatement.

**The design of new development**

The Council will expect all new development to achieve a satisfactory relationship with its surroundings, demonstrating a regard for the character of the immediate and/or surrounding townscape and the wider Conservation Area. Permission for new development will only be granted where it preserves and enhances the character of the Conservation Area as a whole. The Council encourages high-quality, architect-designed modern development and wishes to discourage poor pastiches of historical styles where proportions and materials are often inappropriate. Existing buildings that are unsympathetic to the character of the Conservation Area will not be regarded as valid precedents for further such development.

The Council will require the Design and Access Statement for all significant new development to be submitted in detail. The submission should include an analysis of the contribution that will be made by the proposed new building to the character of the immediate and/or surrounding townscape and the wider Conservation Area as defined in the Conservation Area Appraisal. The City Council's Design SPD (2019) and Mature Suburbs Guidelines SPD (2008) provide detailed guidance on 'design criteria' (section 4.12) and 'determining character' (section 4.5).

**Development in the Conservation Area setting**

New development in the setting of the Conservation Area should, in height, scale and massing, respect and preserve characteristic views within, from and into the Area. The Council will not permit new buildings or additions to existing buildings beyond the Conservation Area boundary to intrude on or block significant views or sightlines.

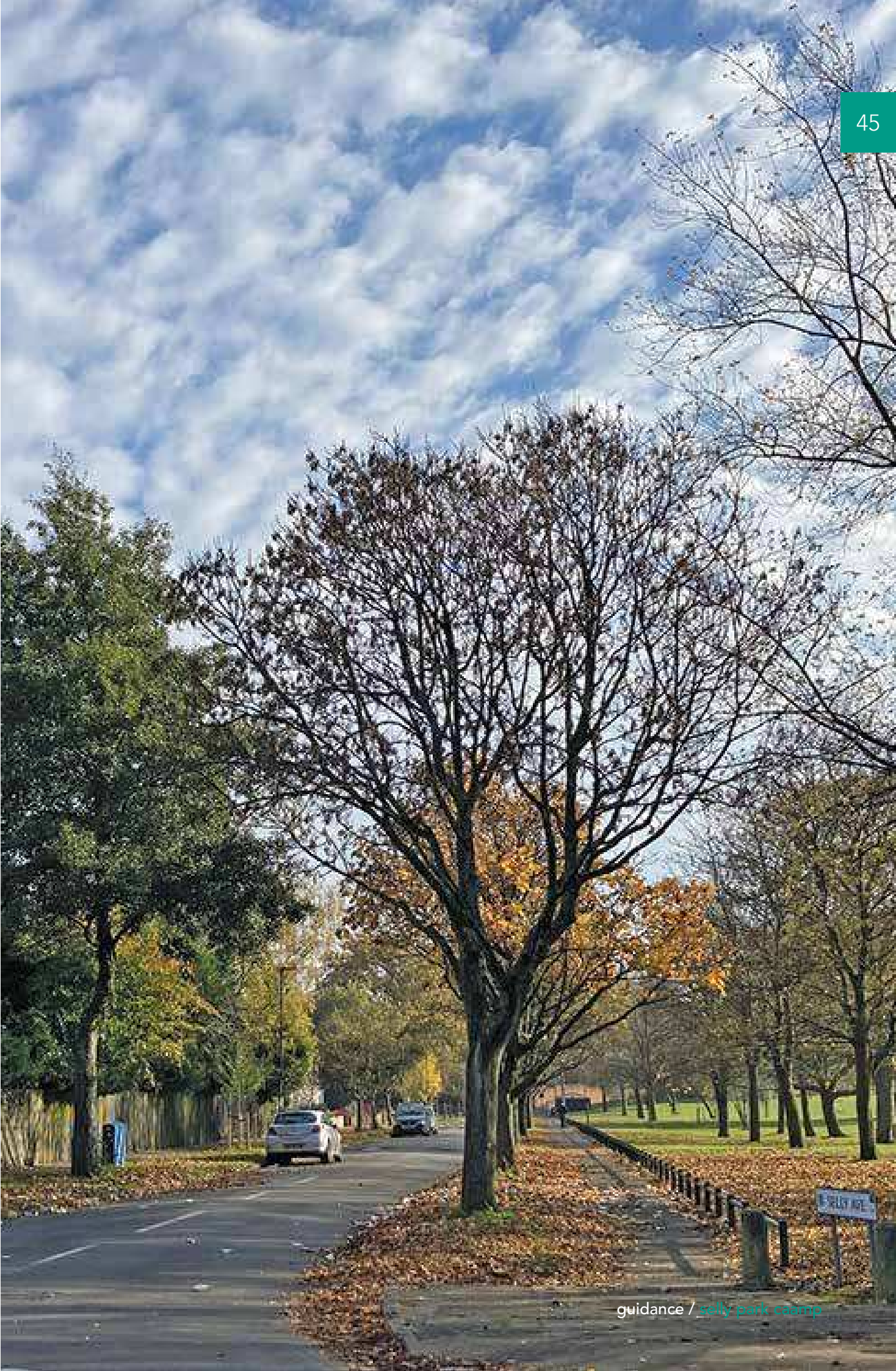
**Key design principles**

The design principles below should be applied as appropriate to all new development, including extensions, additions and other works to existing buildings.

- New buildings should follow the building line characteristic of the locality or character area. Dominant architectural elements or features which project beyond the street frontage line will not be permitted.
- New buildings should not be significantly higher or lower than their neighbours and should reflect the building heights characteristic of the locality or character area. This will normally limit new frontage buildings to a maximum of three storeys.
- Whilst not necessarily copying historical styles, the plan form and architectural treatment of new buildings should complement the historic and architectural character of the Conservation Area. In particular, principal elevations must always front the principal street. Buildings behind the principal street frontage should be subordinate in height, scale, massing and elevational detail.

- New buildings should respond appropriately to actual ground level.
- The roof forms and rooflines of new buildings must complement the roof forms and roof lines of the surrounding and/or adjoining buildings. Roof-lights should be kept to a minimum, be of a conservation specification and be located on the rear slope of the roof.
- New buildings should respect the elevational hierarchy found in traditional buildings, in particular the proportion of solid to void. Windows should be set within reveals of sufficient depth to add definition and interest to the façade. Main entrances should be set in the principal elevation.
- Local identity should be reinforced through the use of natural materials traditionally employed in the area. Every care should be taken to match materials in colour, texture and weight. All building materials should be of high quality. The use of man-made materials such as uPVC is not supported.
- Architectural detail of high quality and which contributes to scale, proportion and legibility will be encouraged. Indiscriminate, fussy and arbitrary use of applied features or detail will be resisted.

- New buildings must preserve views and vistas characteristic of the Conservation Area and respect the setting of key historic buildings.
- New buildings should be accessible to all users, including people with disabilities. Where specialised access is required it must be treated as integral to the design.
- Proposals for improvements in energy efficiency and for sustainable methods of energy supply will be supported where they do not detract from the historic and architectural character of the Conservation Area. Solar panels should normally be located on the rear slope of the roof.



Groundscape

The existing public groundscape within the Conservation Area provides a green and natural setting for its buildings and structures.

Street surfaces are generally in reasonably good repair and pavements throughout the Conservation Area are mainly slabbed but with some asphalt. Cracked and uneven paving should be repaired or replaced. If new paving schemes are proposed the design and materials should relate well to the surrounding buildings.

In most of the Conservation Area, historic materials survive. Great care should be taken to retain and accurately repair granite kerbstones and granite setts defining the edge of roads and drainage channels. Work on these surviving features should be carried out to the highest standard.

Street furniture

New street furniture (including benches, name-plates, pillar boxes and lamp-posts) should be carefully designed or selected to reflect the suburban character of the Conservation Area.

Care should be taken to avoid spurious ‘heritage’. Any additions should be justified and restricted to essential items. Damaged or lost cast-iron street name-plates should be replaced by modern replicas since they are an important part of the character of the Conservation Area.

Clutter

A co-ordinated effort should be made to avoid street clutter through good design and careful siting.

Where possible signs and equipment should be fixed to lighting columns, buildings or other existing structures. Larger items such as cable TV/phone control boxes should be sited at the back of the footway. The design and siting of essential new equipment will be coordinated by the Council.

Street trees

Street trees and woodland are characteristic of the whole of Selly Park Conservation Area, ranging from tall limes and beeches, to mid-sized white beam and mountain ash and small flowering cherries. These are largely set in grass verges along the kerbside, and contribute substantially to the character and biodiversity of the Conservation Area.

In addition, most individual properties are bordered at the front and side by hedges and shrubs. The protection of trees and border hedges against pressure to amplify parking space is of paramount importance to the character of the area.

Views

Key views and street views should be protected and new features within the public realm carefully sited to avoid intrusion on the setting of buildings.

Important views include those of the St Stephen’s Church from almost all points of Selly Park; the University of Birmingham’s clock tower from Elmdon, Serpentine and Oakfield Roads; the broad sweep of Selly Park Road; the gentle curve of Uplands and Selly Wick Roads with their distant views of Cannon Hill Park; St Paul’s Convent as seen from Selly Park, Selly Avenue and Kensington Roads; and from many points of the Conservation Area, Selly Park Recreation Ground with its open space bordered by large forest trees.

Street and traffic management

Any alterations to the streets and roads within the Conservation Area, including changes in the width of footways or carriageways should respect the historic street pattern that has remained unchanged in most cases from well before the area was first built upon.

20mph speed limits are now in force throughout the Conservation Area. While these help to slow traffic, their effectiveness depends on enforcement. 20mph speed signs should be sufficiently closely spaced not to be ignored. Parking restrictions which are currently under consideration also require enforcement if they are to be effective.

Trees and open spaces

In addition to street trees and hedges throughout Selly Park, there are also extensive areas of public and private open space and woodland in the Recreation Ground, Elmdon Road playing field, the grounds of the Convent of St Paul, and the lake in the grounds of Cleeve House at No.34 Kensington Road. The lakes and woodland of the Southbourne Close estate are protected by a covenant made by the owners of ten properties in Kensington and Selly Park Roads with the developer of the estate.

Existing hedges, trees, woodland, open space and lakes within the Conservation Area should be retained. When felling or cutting back any tree it is necessary to give the Council six weeks written notice

Selly Park Conservation Area is surrounded by areas of intensive development. Local policy recognizes this tension which requires careful management, monitoring and enforcement.

unless a higher level of protection in the form of a Tree Preservation Order is in place. In giving notice, it is necessary to specify precisely what works need to be carried out and why.

Enforcement and remediation strategy

The Council has a duty to consider taking enforcement action where it believes there to have been a breach of planning control. Given the particular threat to the special character of the Conservation Area that unauthorised development entails, the City Council will carry out an annual review of the Conservation Area and will take appropriate action when it is in the public interest to do so.

Repair and maintenance

The Council will use its statutory powers to secure the preservation of threatened buildings in the Conservation Area. In the case of statutorily listed buildings these powers include Urgent Works and Repairs Notices and, as a last resort, compulsory acquisition. The Council also has the power to secure the preservation of locally listed and unlisted buildings where it is important for maintaining the character or appearance of the Conservation Area and Section 215 notices will be considered where the amenity of the area is affected.

In Selly Park, there are several very significant walls whose repair and maintenance needs to be monitored. These include in

particular the substantial wall in the south side of Uplands Road near where it joins Selly Park Road, and the walls around the Convent. The Council can provide guidance on the repair and maintenance of traditional buildings and boundaries in the Conservation Area.

Article 4(1) Direction

All properties within the Selly Park Conservation Area are subject to an Article 4(1) Direction that controls the conversion of family dwellings into houses in multiple occupation (HMOs). The Direction is city-wide as of June 2020 but its effectiveness depends on strict monitoring, effective information systems and enforcement.

Article 4(2) Direction

The majority of properties within the Conservation Area are subject to an Article 4(2) direction or have been built after the designation of the Conservation Area. Article 4(2) Directions control small-scale change through the removal of some permitted development rights. For example, some alterations to a property fronting a highway may require planning permission within the Article 4 area. A new Article 4(2) Direction will be considered to properties following any extensions of the Conservation Area. A guide to the Article 4(2) for owners and occupiers is contained in Appendix C.



# Opportunities for positive future change

## Institutional uses

Institutional use of houses built for residential purposes frequently leads to the removal of original architectural details, to improve ventilation for example, and the addition of inappropriate modern features, especially connected to front door disability access.

Institutions also usually require additional parking, delivery areas and bin storage in former front gardens leading to the loss of vegetation.

There have been some restorations of important buildings from institutional to residential use in the Conservation Area: Copperfield House and Grade II listed Selly Wick House. Given the overwhelmingly residential character of the Conservation Area, conversion of former institutional buildings back to their original use is to be encouraged.

Applications for change of use to residential care and nursing homes (use class C1 and C2) and non-family dwelling houses should be subject to similar restraint as that laid out in the Moseley and Sparkhill Area of Restraint SPD.

## Multiple occupation

The number of houses in multiple occupation is not wholly known. However, the situation is becoming clearer with the strengthening of licensing regulations in 2018 together with the introduction of Article 4(1) in 2014 and its extension to the whole city from June 2020. The conversion of dwellings to multi-occupation should be resisted and conversion back to family ownership will be encouraged by the City Council.

Houses in multiple occupation are often in poor decorative repair

externally. Porches are often converted to open access vestibules with post-boxes and apartment doorbells; and front gardens sometimes lack vegetation to provide parking space for residents. Opportunities for enhancement therefore come when houses formerly in multi-occupation are returned to single occupation.

## Appropriate development

Selly Park is characterized by its eclectic architectural styles, reflecting the stages of its development, overall making a harmonious whole. 'Inappropriate development' is change that is harmful to the character of a particular building or road. Developers and architects will be encouraged to positively provide schemes that are contextualised to their particular location. Where the opportunity arises, good modern development with high quality architecture and materials will be encouraged.

## Effective control of traffic and parking

Effective control of traffic speed and parking density would have a major positive effect in protecting an attractive, balanced and sustainable residential community surrounded by the pressures of intensive development in neighbouring areas. Speed limits have been introduced and positive steps may be taken in applying parking restrictions.



# Appendix A

## Statutory Listed Buildings

**Grade II Statutorily Listed**

See <https://britishlistedbuildings.co.uk/england/selly-oak-ward-birmingham#.W6OyX2iPKUk>

1. 2, Selly Wick Road B29
2. 48 Selly Wick Road B29
3. 641 and 659, Bristol Road B29
4. 679 and 681, Pershore Road B29
5. 683 and 685, Pershore Road B29
6. 772 and 778, Pershore Road B29
7. 921, 923, 927 and 929, Pershore Road B29
8. Church of St Stephen
9. Convent of St Paul
10. Selly Wick House B29

**Locally Listed**

Copperfield House, 60 Upland Road, B29.  
Cleeve House, 34 Kensington Road, B29.  
54 Selly Wick Road, B29.

# Appendix B

## Wider planning policy framework

**National legislation and guidance**

- Planning (Listed Buildings and Conservation Areas) Act 1990.
- Town and Country Planning Act 1990 (part viii).
- Town and Country Planning (Trees) Regulations 1999.
- Planning and Compensation Act 1991 (Section 23).
- Ancient Monuments and Archaeological Areas Act 1979.
- National Heritage Act 1983.
- Birmingham and Black Country Biodiversity Action Plan.

**National Planning Policy Framework (2021)**

The revised National Planning Policy Framework, revised on 20th July 2021, sets out national policy on planning around a variety of issues and supersedes the majority of Planning Policy Guidance Notes and Planning Policy Statements. Of particular relevance to the CAAMP is Section 16 ‘Conserving and Enhancing the Historic Environment’.

**Planning practice guidance**

[Conserving and enhancing the historic environment \(2014\).](#)

The guidance provides advice on enhancing and conserving the historic environment and follows the advice set out in ‘Conservation Area Designation, Appraisal and Management: Historic England Advice Note 1 (2016).

**City Council policy context**

The CAAMP has been prepared in accordance with, and as a supplement to, the following planning policies:

[The Birmingham Development Plan January 2017](#)

The Plan is the city’s statutory planning framework guiding decisions on development and regeneration activity over the period until 2031. The Plan recognises Birmingham’s historic development and its rich and varied environment which contributes to the unique essence of the city. Policies in the Plan seek to value, protect and enhance the historic environment; see especially ‘Policy TP12 Historic Environment’. The BDP identifies Selly Oak as a key strategic site and district growth centre within the wider city context.

[The Wider Selly Oak Supplementary Planning Document 2014.](#)

This provides planning and development guidance to ensure that Selly Oak can benefit from the major developments taking place in the area by enhancing the public realm, retaining and encouraging community facilities, protecting the area’s character, managing the residential environment and improving the quality of the area for all residents.

[Mature Suburbs Guidelines Supplementary Planning Guidance \(2008\)](#)

This sets out the City Council’s strategy for dealing with the particular development pressures on suburban housing areas of the late Victorian, Edwardian and inter-war suburbs.

[Regeneration through Conservation Supplementary Planning Guidance \(1999\)](#)

This sets out the City Council’s strategy for conservation of the built environment with a particular focus on the opportunities for regeneration that conservation can create. The stated aim is to produce character appraisals for all Conservation Areas.

[Heritage Strategy 2014. The Strategy ‘Protecting the Past - Informing the Present’](#)

This emphasises partnership between the council and voluntary organizations to ensure that the city’s heritage - including listed buildings and conservation areas - is properly considered in planning and development processes, at the level of the city, its districts and neighbourhoods.

# Appendix C

## Article 4(2) Direction

### Article 4 Direction

An Article 4(2) Direction applies to residential properties only and removes some permitted development rights from front and significant elevations. This means that some minor alterations which would normally not require planning permission may need consent.

Alterations such as installation of replacement doors, windows and porches, the creation of hard standings and the removal of original boundary treatment, perhaps insignificant as individual alterations, have taken place in Selly Park Conservation Area under Permitted Development before the application of the Article 4(2) Direction to the detriment of the character of the Conservation Area.

The Article 4(2) Direction means that minor alterations will require planning permission if they front a highway or open space. These include:

- Any enlargement, improvement or alteration to a dwelling house.
- Any alteration to the roof of a dwelling house.

- Construction of an external porch.
- Creation or replacement or enlargement of a hard standing for off-street parking.
- The installation, alteration or replacement of a chimney of a dwelling house.
- Installation or alteration of a satellite antenna on any part of the front of the dwelling house.
- Erection, demolition or alteration of a gate, fence or other means of enclosure at the front of a dwelling house.
- Exterior painting of the front of a dwelling house.

Houses covered by the Article 4(2) Direction in the Selly Park Conservation Area are:

Eastern Road  
(even 2-12, 20-24; odd 21-27, 59).

Elmdon Road  
(even 2-20; odd 27-43).

Greenland Road  
(even 2-6, 6A, 16-20, 24A, 26-38, 44, 46, 50-60, 64; odd 27, 29, 51).

Kensington Road  
(even 32-48; odd 5).

Oakfield Road  
(even 14-34, 34A, 36-40, 56, 66-78, 82-102, 108-116, 120, 124-146; odd 11, 15, 17, 21-27, 35-39, 63, 65, 75-103, 103A, 105, 107).

Pershore Road  
(odd 593,785, 793, 795, 805, 807, 827, 829, 841, 843, 859, 861, 873, 875, 879-883, 917-923, 927, 929, 955, 961-971).

Selly Avenue  
(1-9, 15).

Selly Park Road  
(even 2-6, 10, 72, 110-126, 140-144, 158-160, 194-202; odd 37-67, 87-97, 101, 103, 103A, 105, 107-131).

Selly Wick Road  
(even 8, 16-24, 28, 30, 34, 38-42, 46-50, 54; odd 5-11, 15-23, 27-35, 63-69).

Serpentine Road  
(even 2, 2A, 4, 6, 30-46; odd 3-25).

Upland Road  
(even 28, 30, 34-56, 56A, 58; odd 37-41, 41A, 45, 47, 47A, 49, 51, 51A, 65).

# Appendix D

## Archaeological sites and monuments

SMR

03282-BI988

SITE NAME

Raddlebarn Road Roman Coin

RECORD

Roman coin found at Raddlebarn Road

CLASSIFICATION AND TYPE AND MATERIALS/EVIDENCE

Findspot: Roman - 43AD to 409AD

NATIONAL GRID

SP052824

WARD

Sely Oak

HISTORIC COUNTY

Warwickshire

ADDRESS

Raddlebarn Road

STATUS AND OTHER

Development Control Area (South)

Reference No: 03282

Area of Archaeological Importance: 169

DESCRIPTION

03282 Roman coin found at Raddlebarn Road

SOURCES

Bibliographic reference

ASSOCIATED FINDS

Coin Roman 43AD to 409AD

SMR

20352-BI2002

SITE NAME

Selly Park Recreation

RECORD

Body sherd of prehistoric pottery (possibly Iron Age) and piece of worked flint from watching brief on construction of path and car park.

CLASSIFICATION AND TYPE AND MATERIALS/EVIDENCE

Findspot: prehistoric - 500000BC to 42AD

NATIONAL GRID

SP052823

WARD

Sely Oak

HISTORIC COUNTY

Worcestershire

ADDRESS

Raddlebarn Road (W)

STATUS AND OTHER

Development Control Area (South)

Reference No: 20352

Area of Archaeological Importance: 169

DESCRIPTION

20352 Body sherd of prehistoric pottery (possibly Iron Age) and piece of worked flint from watching brief on construction of path and car park.

SOURCES

Excavation archive: BRRP, 1996.

ASSOCIATED FINDS

Lithic flint implement. Prehistoric - 500000BC to 42AD

SMR		SITE NAME	
20428-BI2078		Selly Park Recreation	
RECORD			
Monument			
CLASSIFICATION AND TYPE AND MATERIALS/EVIDENCE		NATIONAL GRID	
		SP053824	
WARD		HISTORIC COUNTY	
Sely Oak		Worcestershire	
		ADDRESS	
		Raddlebarn Road (W)	
STATUS AND OTHER			
Reference No: 20428		Area of Archaeological Importance: 169	
DESCRIPTION			
20428 An on-going resistivity survey concentrated in 1995 on an area which map-work suggests may be part of the medieval successor to a Roman road. Results were not supportive of a possible NNE route to Sutton Park, (although a high resistance anomaly on the NE side of the survey area may merit further investigation), but did seem to identify an irregular NW-SE running feature. This might possibly relate to an alternative course for a direct line between Stirchley and Farquhar Road. However, a boundary line shown on the 1884 O.S. map provides the clearest correlation between the resistivity readings and a known feature.			
SOURCES			
Bibliographic reference: Selly Park Recreation Ground, Leather P., 1995-1997.			

SMR

SITE NAME

Kensington Road (S)

STATUS AND OTHER

Development Control Area (South)

Reference No: 02980

National Archaeological Record: SP08SE 11

OS Number: SP08S

DESCRIPTION

02980 Moated site at Selly Manor, Northfield. No111. Grid uncertain. Selly Hall (? formerly Selly Manor) at SP 055824. Four ponds in grounds at SP 0550 8266, three roughly forming the SW end and SE side of a rectangle, the fourth forming the NE end and turning into the NW side (? remains of a moat, 180m by 80m). The much reduced remains of the three ponds lie within private gardens and wooded, overgrown waste land. The fourth pond, to the NE, has been filled in without trace. The remains are now too scant for any firm conclusions to be reached as to their origin. The site of Selly Hall is occupied by a modern convent. The siting given by Birmingham Museum falls in an area largely developed with C19 housing and of recreation grounds. Probably some archaeological potential. Selly Wick House to N of site may stand on earlier site. It has been suggested that ‘wick’ element may indicate ‘vicus’ but this is conjectural.

SOURCES

1. Index: Birmingham Museums Moated Site List, 1975.

2. Map: Northfield Tithe Map, 1840.

3. Bibliographic reference: ASP, 1976.

4. Evaluation Report: Harris, D, 1991.

The CAAMP has been prepared with due consideration to the City Council’s responsibilities under the Public Sector Equality Duty.	With regards to the three individual elements of the Public Sector Equality Duty for the City Council, the main impact of the CAAMP is to advance equality of opportunity between persons who share a relevant protected characteristic and persons who do not share it.
As such an equality analysis has been undertaken; this indicates on the basis of the currently available information that the proposals outlined in this document will not have an adverse impact upon persons within the protected categories. This equality analysis will continue to be updated as part of the CAAMP monitoring process.	Specifically, the policies within this CAAMP seek to ensure that new developments are accessible to all users, including people with disabilities.

**Contact**

Planning and Development  
Inclusive Growth Directorate  
Birmingham City Council

**E-mail:**  
planningandregenerationenquiries@birmingham.gov.uk

**Web:**  
www.birmingham.gov.uk

**Post:**  
PO Box 28  
Birmingham  
B1 1TU

The City Council will communicate this document in a suitable way to all audiences. In addition to the online and printed documents, requests for the document in alternative formats will be considered on a case by case basis including large print, another language and typetalk.

Plans contained within this document are based upon Ordnance Survey material with the permission of Ordnance Survey on behalf of the Controller of Her Majesty's Stationery Office.

© Crown Copyright. Unauthorised reproduction infringes Crown Copyright and may lead to prosecution or civil proceedings.  
Birmingham City Council. Licence number 100021326, 2022.



The Selly Park Conservation Area Character Appraisal and Management Plan produced by  
Birmingham City Council, Planning and Development, Inclusive Growth Directorate.





## Selly Park Conservation Area

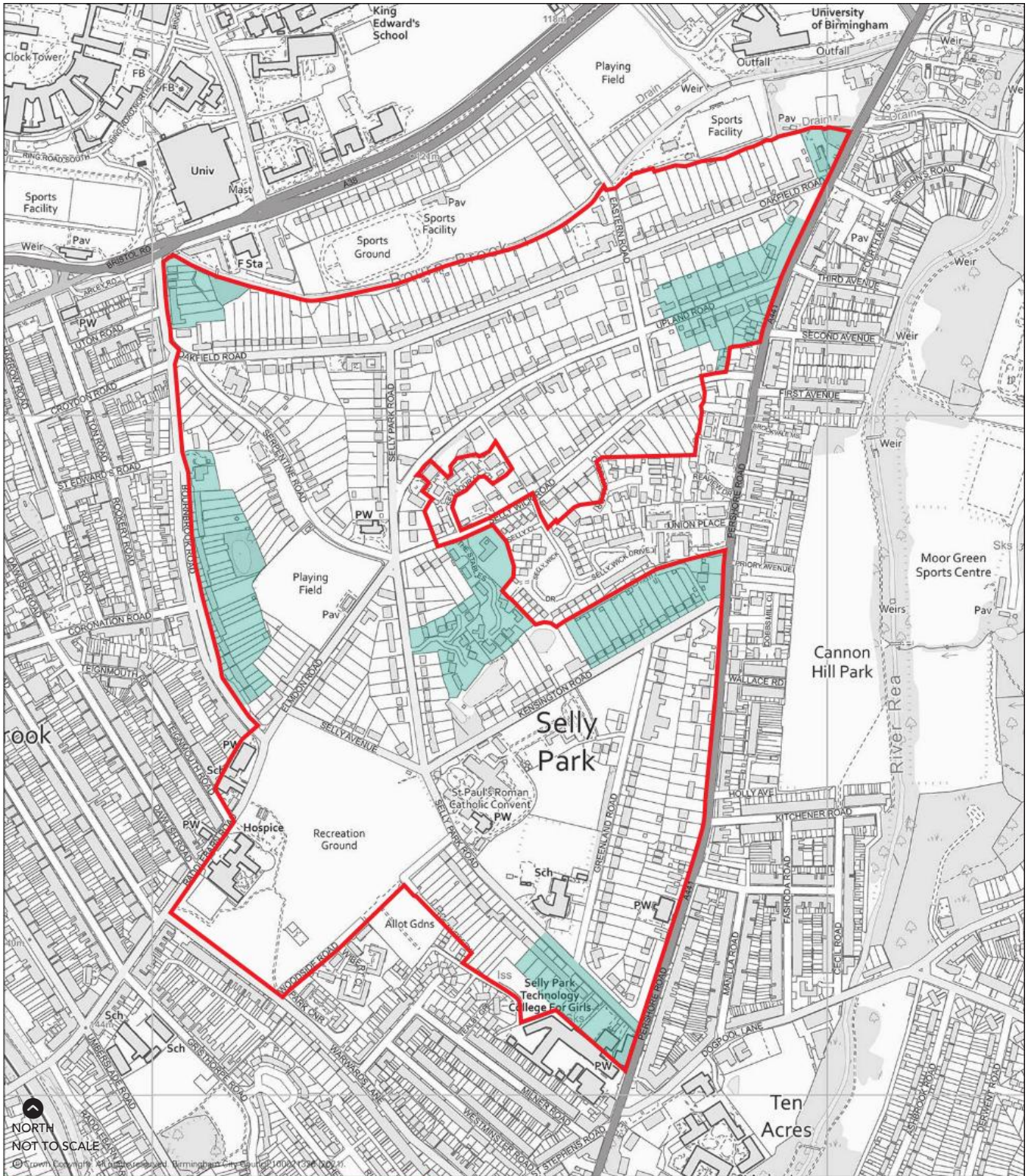
Character Appraisal and Management Plan

May 2022









**Plan 1**  
Proposed boundary of the Selly Park Conservation Area.

**Key**

- Proposed Conservation Area boundary
- Proposed additions to the conservation area





Schedule of permitted development rights to be withdrawn within The Selly Park Conservation Area Article 4(2) Direction

Schedule 2, Part 1, Class A of the Order:

The enlargement, improvement or other alteration of a dwellinghouse where any part of the enlargement, improvement or alteration fronts a relevant location.

Schedule 2, Part 1 Class C of the Order:

Any alteration to a roof slope that fronts a relevant location.

Schedule 2, Part 1, Class D of the Order:

The erection or construction of a porch outside any external door of a dwellinghouse, where that external door fronts a relevant location.

Schedule 2, Part 1, Class F of the Order:

The provision, within the curtilage of a dwellinghouse of a hard surface for any purpose incidental to the enjoyment of the dwellinghouse as such: or the replacement in whole or in part of such a surface, where the hard surface would front a relevant location

Schedule 2, Part 4 1, Class G of the Order:

The installation, alteration or replacement of a chimney, on a dwelling house.

Schedule 2, Part 1, Class H of the Order.

The installation, alteration or replacement of an antenna on a part of a dwellinghouse or on a building within the curtilage of a dwellinghouse which in either case where the part of the dwellinghouse or other structure on which the antenna is to be installed, altered or replaced fronts a relevant location.

Schedule 2, Part 2, Class A of the Order:

The erection or alteration of a gate, fence, wall or other means of enclosure within the curtilage of a dwellinghouse where that gate, fence, wall or other means of enclosure fronts a relevant location.

Schedule 2, Part 2, Class C of the Order.

The painting of the exterior of any part of a dwellinghouse or any building or enclosure within the curtilage of a dwellinghouse where the painted part of that dwellinghouse or building or enclosure fronts onto a relevant location.

Schedule 2, Part 31, Class B Order':

The demolition of a gate, fence, wall or other means of enclosure within the curtilage of a dwellinghouse where that gate, fence, wall or other means of enclosure fronts a relevant location.

A 'relevant location' means a highway, waterway or open space

Schedule of properties covered by the Article 4(2) Direction

Proposed additions to existing Article 4(2) Direction in red.

Bournbrook Road (Odd 3-9, 15, 69-131)

Eastern Rd (even 2-12, 20-24, odd 21-27, 59)

Elmdon Rd (even 2-20, odd 27-43)

Greenland Rd (even 2- 6, 6A, 16-20, 24A, 26-38, 44 &46, 50-60, 64  
odd 27 & 29, 51)

Kensington Rd (even 32-48, odd 5)

Oakfield Rd (even 14-34, 34A, 36-40, 56, 66-78, 82-102, 108-116, 120,  
124-146, odd 11, U &17, 21-27, 35-39, 63 &65, 75-95, 97-103, 103A,  
105 &107)

PershoreRd  
(odds 93,785793&795805&807,827&829,81&843, 859&861,873&875,879-883,917-923,  
927&929,955,961,965-971)

Selly Avenue (odd 1-9, 15)

Selly Park Rd (even 2-6, 10, 72, 110-126, 140-144, 158 & 160, 194-202,  
odd 37-67, 87-97, 101&103, 103A, 105, 107-131)

Selly Wick Rd (even8,16-24,28&30,3P,38-42,46-50,54odd5-11,15-23, 27-35, 63-69)

Serpentine Rd (even 2&2A, 4&6, 30-46, odd 3-25)

Upland Rd (even 28&30, 34-56, 56A, 58 odd 37-41, 41A, 45, 47, 47A, 49,  
51,51A, 65)



Resident	Comment	Support Document Y/N	Support Boundary Y/N	Support Article 4 Direction Y/N	Officer Response
1	<p>I refer to your letter of 9<sup>th</sup> august 2021 to Southbourne Close of which I am the owner with my husband as well as being members of the Lakeside Selly Park Management Company.</p> <p>I note the proposed article 4 direction wherein it is proposed, amongst other matters to include Southbourne Close within a revised boundary to the Selly Park Conservation Area.</p> <p>I refer to the consultation document which states</p> <p><b><i>‘The conservation area is proposed to be redrawn to be as far as possible consistent with the covenanted area. On these grounds as well as the representative nature of their houses it is suggested that the following areas be included in the Conservation Area</i></b>  <b><i>East end of Upland Rd</i></b>  <b><i>Eastern side of Bournbrook Rd .....</i></b></p> <p><b><i>In addition there are two private estates of good quality houses in landscaped areas that merit inclusion. Built in the 1980’s in what had been the grounds of Highfield House The Stables has 9 houses and Southbourne Close has 12. The residents of Southbourne Close own and manage the</i></b></p>	Y but with amendments	N/objection	Y/objection	<p>Point 1: It is not proposed for Southbourne Close to be included in the new Article 4 Direction. Some permitted development rights have already been removed through a planning condition of the development.</p> <p>Point 2: Text in document amended from 12 to 10 houses and to reflect reason for proposed inclusion.</p> <p>Point 3: It is acknowledged that covenants are not planning matters however part of the reasons for including covenanted areas within the conservation area boundary are to allow for a more cohesive overall management of the conservation area.</p> <p>Point 4: With regard to legislation and Section 69 of the Planning (Listed Buildings and Conservation Areas) Act 1990, whilst it is acknowledged that the houses of Southbourne Close are modern they are</p>

	<p><b><i>surrounding lake and woods which are already part of the Conservation Area.'</i></b></p> <p>As a matter of record and from your own plans Southbourne Close contains 10 not 12 houses.</p> <p>Dealing with the proposal itself to amend the boundary, it appears that the proposal itself is based on tidying up the boundary to align land under the Selly Park Covenant. As far as I am aware matters such as covenants of this nature are not a planning matter and I therefore struggle to see how this carries weight without other criteria. The proposal as far as I can see contains no reason within the legislation under s69 of the Planning (Listed Building and Conservation Areas ) Act 1990. The houses within Southbourne Close are build by Clarke Homes a Midlands builder which was bought by Westbury Homes which in itself was bought by Persimmon Homes in 2006. The houses were built around 1986 and are typical standard house builder, house types which would have been placed in many different locations. They were not ostensibly designed for the location, these house types will have been repeated on Clarke Homes sites throughout the Midlands. The houses have no specific features and again use standard elevational treatments mixed through the development with some render, timber boarding and hanging tiles. The windows are plastic and most properties have had additions to them ranging from single story to two story extensions. The perimeters are secured by a</p>				<p>characteristic of the area in that they are good-sized detached properties of varying forms built in a traditional design of brick and tile with pitched roofs and gables. This central part of Selly Park is an integral part of the area and holds historic interest. The development is set in a landscaped area which includes the historic area of Selly Manor Moat and was formerly part of the historic grounds of the 19<sup>th</sup> century Highfield House (now demolished). There are a number of mature trees within the development, characteristic of the leafy suburban feel of the area. The aspirations of the local community to include Southbourne Close in the conservation area is supported by the LPA and by Historic England whose comments state:</p> <p><i>"There is a clear articulation of how the conservation area evolved through a combination of architectural styles that span a range of periods with a sustained contribution made by open spaces, trees and other vegetation and important views. There is also a succinct and</i></p>
--	----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	--	--	--	----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

	<p>mixture of mainly timber fencing with some brick walls. All the trees within the development are covered under a separate TPO therefore conservation area status will offer no additional protection to these. The development is secured by a gate and offers no access to the public and no opportunity is apparent to view all but a fleeting glance of 2 or 3 properties from the public highway. I therefore so not see how a 1980's standard estate development with no public access and a mixture of standard elevational treatments with various additions can add anything at all to the conservation area. There is no merit to include the Close within the new area.</p> <p>The is a reference to 'good quality housing' what does this mean, surely this statement carries little or no weight in the planning balance of the decision ? Without specific reasons it would be difficult for a decision maker to form a positive view on the proposal. There does not seem to be any planning matters that have been set out in relation to the inclusion of Southbourne Close in the conservation area and I therefore wonder if this would leave the process open to a legal challenge should a decision be made to include it</p> <p>The document to my mind needs to set out the reasons why the areas proposed were not included in the first designation and what has changed from then to now to include them. A conservation area is meant to have definite</p>				<p><i>insightful analysis as to how all of this currently contributes to the areas special interest, character and appearance. The conservation area boundary changes suggested have equally clearly been arrived at after thoughtful analysis."</i></p> <p>Point 5: the reference in the document to "good-quality housing" is descriptive in nature within the context of the appraisal document. Planning decisions affecting properties in conservation areas are based on the legislative requirements of Section 72 of the Planning (Listed Buildings and Conservation Areas) Act 1990 which requires that special attention be paid to the desirability of preserving and enhancing the character and appearance of the conservation area.</p>
--	-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	--	--	--	-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

	<p>architectural quality or historic interest to merit designation. The consultation document in no way sets this out or provides even a hint as to which if not both is being proposed to designate Southbourne Close under. The areas of historic interest which were not demolished are the lake and folly which are included already, there is no historic interest in a 1980's estate, to my knowledge no one spectacular has lived here and the architectural quality is well covered above. I therefore object to Southbourne Close being included in the strongest manner and request that these views are taken into account in the decision making process and that at the very least the errors that are apparent in the document are addressed ahead of any decision</p>				
2	<p>Thanks for the updated documents, especially the new overview document. Fortunately I have a large screen on my desktop and was able to read the document with the font at a reasonable size. I suspect many people in private homes will not have large screens and will have difficulty viewing a document like this in landscape format on laptops, tablets, and small desktop screens. But having the extra information about what's going on is a real improvement.</p>				
3	<p>I refer to your letter dated 9th August 2021 to Southbourne close B29 7LU which me and my wife own. I note the article 4 direction whereby Southbourne close has been included within</p>				<p>Southbourne Close is not proposed for inclusion in the new Article 4 Direction.</p>



	<p>the revised boundary for the Selly park conservation area.</p> <p>We object to Southbourne close being included in the conservation area, the reasons for this objection include</p> <ul style="list-style-type: none"> <li>- The houses were built in the 1980's and thus do not represent any historic appearances etc. related to the other older houses in this area. Our houses are classed as modern and have no architectural relevance in comparison to other properties in the area.</li> <li>- The houses are not in view of any public and reside in a privately owned close managed independently by Lakeside Selly Park Management Company.</li> <li>- There is no public access to the Southbourne close and none of the houses are in direct view of any public passers by.</li> </ul>				<p>The proposed inclusion of Southbourne Close in the conservation area is based on the historic interest of the grounds being the site of Selly Manor Moat and former grounds of Highfield House and landscape features such as mature trees which contribute to the prevailing green and verdant character of the area. Trees, hedges, boundaries and street greenery are important elements of the conservation area, and applies not only in public places, but on private land as well.</p> <p>Historic England are supportive of the proposed boundary amendments, stating in their comments: "<i>The conservation area boundary changes suggested have equally clearly been arrived at after thoughtful analysis</i>".</p>
4	<p>1. Yes, I approve of all that is mentioned in the Management Plan (CAAMP) &amp; I think it should be submitted as it is &amp; not changed. Obviously, a lot of thought has been put into compiling the Plan. I disagree with the gentleman who thought there should be no mention of highways, roads etc. If it's included you'll be able to take the appropriate action in the future.</p>	Y/ no objection	Y/no objection	Y/ objection	

	<p>2. Yes, I agree with the Proposed Boundary amendments. I live in The Stables &amp; feel strongly that the character of the houses in The Stables &amp; the rest of the Conversation Area should maintain their individual character, appropriate for the era in which they were built.</p> <p>3. Yes, I agree with the new Article 4 Direction for the Selly Park Conservation Area.</p> <p>The meeting yesterday at St. Stephen's Church was very helpful &amp; informative. Thank you for all your efforts &amp; I feel reassured that Selly Park will retain its charm &amp; character.</p>				
5	<p>As the owner/occupier of Oakfield Road Selly Park Birmingham I write to thank you for the opportunity afforded residents by last night's public drop-in event at St. Stephens Church. Those present gave a very clear explanation of the process.</p> <p>I support the views and intentions outlined in The Conservation Area Appraisal and Management Plan.</p> <p>I support and indeed welcome the proposed boundary amendments to the designation. I further support the new Article 4 Direction.</p> <p>Thank you for the work you have done, and will continue to do, for the Selly Park Conservation Area.</p>	Y/ no objection	Y/ no objection	Y/ no objection	

6	<p><i>Document</i> Comprehensive and well set out. Some pictures for whole pages were pixellated from being over enlarged. A fair description of the area and why it needs preservation.</p> <p><i>Changes</i> The changes are relatively minor with a recognition of newer, quality developments. There is a sensible realigning of the area with the Selly Park Covenants.</p> <p><i>Future</i> We are still waiting for a parking scheme. An annual inspection on foot by a competent planning officer should quickly notice any inappropriate changes, but enforcement seems to lack consequences. I am very positive about Selly Park and I expect the area to improve with upgraded frontages, the backing of conservation measures and improved highways.</p>	Y/ no objection	Y/ no objection	Y/ no objection	
7	<p>Thank you for your letter of 9<sup>th</sup> August 2021 and the subsequent meeting in Selly Park on the evening of Tuesday Sept 7<sup>th</sup>.</p> <p>You asked us three questions. I give my responses below.</p> <p><b>Approval of the Conservation Area Appraisal and Management Area Management Plan.</b></p> <p>I approve of this document, subject to any minor corrections of facts or typos that you may have received from others.</p>	Y/ no objection	Y/ no objection	Y/ no objection	

	<p><b>Proposed boundary amendments to the designation.</b> I strongly approve of the proposed changes as laid out on Selly Park CAAMP Boundary Plan 1.</p> <p><b>Application of Article 4 Direction.</b> I strongly support the application of Article 4 where possible.</p>				
8	<p>I wish to express my support for the proposed inclusion of part of Bournbrook Road into the Selly Park Conservation Area. I have lived in Bournbrook Road since 1983. I have seen many changes in that time, some of which have been detrimental to the appearance and structure of solid, spacious, family homes built c1931. It would be great to think that at last the road could be afforded some protection from the ravages of deregulated development.</p> <p>Bournbrook is a mixed neighbourhood at the interface between the heavily student populated area of Selly Oak and the existing conservation area of Selly Park. The significant number of HMOs has had an effect on the appearance of many previously attractive family houses and upon the quality of amenities. On a positive note the majority still retain many original features and recently some properties such as 83 and 105 have reverted to family use from multiple occupation. The designation of conservation area could help to further foster the reestablishment of a more balanced community and sustainable neighbourhood.</p>	Y/ no objection	Y/ no objection	Y/ no objection	



	<p>The 8 houses 81-85 Bournbrook Rd are unique in that they adjoin a piece of land approximately 1 hectare in area. This is a beautiful and biodiverse area of mixed woodland with a lake. A covenant determines that the 8 households are responsible for the maintenance and stocking of this 'pleasure garden' as it is described in the deeds. I have taken a special interest in this area over the years, carrying out maintenance and observing the wildlife. I have logged 52 species of birds; there is an active badger set and Birmingham University have carried out bat surveys. In 1990 the area was designated a Site of Local Interest to Nature Conservation SLINC. (BM094)</p> <p>I have always been fearful of the overdevelopment of these houses and the potential heavy use of pesticides/herbicides etc and the felling of mature trees which could have a devastating effect upon this established but fragile ecosystem. Being part of a conservation area may attract residents who would be interested in conserving this gem on the edge of the city centre.</p>				
9	I would like to register my approval regarding the extension of the conservation area and robust application of article 4.	Y/ no objection	Y/ no objection	Y/ no objection	
10	I write in connection with the proposals set out in the draft CAAMP - New Article 4 Direction for the designation of the Selly Park Conservation Area.	Y/ no objection	Y/ no objection	Y/ no objection	

	<p>As a long-standing resident of Selly Park with a property designated within the conservation area, I am pleased to approve all the recommendations made within the draft CAAMP. I welcome the proposals (long overdue) to ensure the appropriate protection and safeguarding of this area of significant cultural and historic importance.</p> <p>I trust the conditions will be rigorously applied when future planning applications are considered.</p>				
11	<p>It was good to chat to you at the meeting. Please find below my comments on the public consultation questions;</p> <ul style="list-style-type: none"> <li>• CAAMP - I DO NOT agree with the document and particularly the statement that multiple occupation conversion often leads to houses in poor repair, taking my recently inherited property specifically (69 Bournbrook Rd) it is currently in very poor repair as a family home as the previous owner lacked funds to maintain it. Recent multiple occupancy homes in the road have been converted to a very high standard and are a credit to the road.</li> <li>• Boundary Amendments - I DO NOT agree with the boundary amendments, particularly for Selly Park West as there are no houses of particular architectural merit.</li> </ul>	N/object	N/object	N/object	<p>Text regarding HMO's amended in document.</p> <p>SPPOA's committee unanimously concluded that, although there was some deterioration in the quality of the Pershore Road end of Upland, Kensington Road and Selly Park Roads, their inclusion in the conservation area would allow the community to monitor and limit further deterioration and, where possible, to press for restoration. The city council are supportive of these aspirations and where planning permission is required have a statutory duty to preserve and enhance the character and appearance of the conservation area.</p>

	<ul style="list-style-type: none"> <li>Article 4 - The area is already covered by the city wide article 4 from June 2020 therefore I DO NOT agree that this should be included specifically in the Selly Park Conservation Area as well</li> </ul>				<p>The city-wide Article 4(1) Direction removes permitted development for HMO conversion and does not relate to other planning matters. The new Article 4(2) Direction for Selly Park would be extended to cover those properties proposed for inclusion in the conservation area on Bournbrook Road only. It is not proposed to include other areas proposed for inclusion in the conservation area in the new article 4 direction at this time.</p>
12	<p>I received your letter dated 9<sup>th</sup> August regarding the proposed changes in the conservation area in Selly Park Area. My property is out of the present conservation area, but as per your proposal it will be included therein. I have following concerns related to this proposals:</p> <p>We have noticed that many passer from Selly Park Road walk in to our drive and check our parked cars and other items in the drive with the intention of possible theft. We wish to install gates on both the entries of our drive and metal railing on the wall of the drive. We wish to enclose our drive to stop unauthorised people to enter into our drive without our permission. My concern is will I be allowed to install the gate and the metal railing on the wall after my property is included into conservation area.</p>	Y/no objection	N/objection	Y/no objection	<p>The effect of inclusion of a property in the conservation area will mean that where planning permission is required the local planning authority will require an application to preserve and enhance the character and appearance of the conservation area. This is done on a case-by-case basis.</p> <p>SPPOA's committee unanimously concluded that, although there was some deterioration in the quality of the Pershore Road end of Upland, Kensington Road and Selly Park Roads, their inclusion in the conservation area would allow the community to monitor and limit further deterioration</p>

	<p>I purchased this property very recently. This property was in the market for very long period. At the moment all the windows (Front and Back) and the Porch area have very small wooden panels with very thin or no double glazing. This cause very high loss of heating and our energy bills are very high. With the current rising energy bills beyond any proportion we will have to replace our windows and Porch area with new double glazed windows. This will change the front and back appearance of our house. My concern is will I be allowed to do this when my house is included into the conservation area.</p> <p>Other than these issues how my property would be affected when it is included into the conservation area. I would also like to understand what benefit we will have once we are moved into the conservation area. Can I also ask you the reason or need to change the present boundaries of conservation area. How would it benefit the whole area in general? At the moment Selly Park Area is a developing area and is in demand and attracts more and more people to purchase properties in this area because of relatively less restriction. If the conservation boundaries are increased and more restriction are put in to place then it would affect the price of the properties in this area.</p> <p>I would appreciate it if you could consider my apprehensions related to these proposed changes and take a decision which would be</p>				<p>and, where possible, to press for restoration. The city council are supportive of these aspirations and where planning permission is required have a statutory duty to preserve and enhance the character and appearance of the conservation area.</p>
--	---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	--	--	--	-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------



	acceptable to and appreciated by all the residents of the area.				
13	<p>I am writing to say that I do not support the proposed boundary changes to the Conservation Area.</p> <p>I do not consider that the additional areas have sufficient architectural or historic interest to justify their inclusion.</p> <p>The reduction in the consistent quality of the existing Conservation Area is not outweighed by any administrative benefits of this 'tidying up exercise'.</p>	Y/no objection	N/objection	Y/no objection	<p>The areas proposed for inclusion are considered to have a number of characteristics of the conservation area, whether this be through architectural interest of the properties, characteristic boundary treatments or landscape features.</p> <p>SPPOA's committee unanimously concluded that, although there was some deterioration in the quality of the Pershore Road end of Upland, Kensington Road and Selly Park Roads, their inclusion in the conservation area would allow the community to monitor and limit further deterioration and, where possible, to press for restoration. The city council are supportive of these aspirations and where planning permission is required have a statutory duty to preserve and enhance the character and appearance of the conservation area.</p> <p>Historic England are supportive of the proposed boundary amendments, stating in their</p>

					comments: <i>"The conservation area boundary changes suggested have equally clearly been arrived at after thoughtful analysis".</i>
14	<p>In response to the meeting which your department organised at St Stephens Church earlier this month, I would like to say how informative and helpful it was. It is always good to have the opportunity to meet the human beings who are involved and to be able to ask questions.</p> <p>There were three questions for us in Selly Park to answer, I think.</p> <p>One was about our opinion of the glossy booklet you had produced for us. I found it clear and with some very useful details in general in the end sections. It was only sad that there were not more copies, as many residents would probably not get access to it, especially non-computerised residents. Apparently two of the six copies disappeared during the meeting. Thank you for producing it.</p> <p>The second question was about the changes to the boundary of your plans. In my opinion they make sense. I realise that some properties are perhaps not up to standard in the new bits, but at least the control of being in a conservation area should stop any further deterioration.</p> <p>The third question was about our opinion on Article 4. I support the aims of Article 4 in general. I was surprised to learn that the</p>	Y/no objection	Y/no objection	Y/no objection	

	<p>roadscape (highway) is not included in the plans because it can have quite a visual influence on an area. There are many cracked paving stones around due to bad parking by lorries etc. I realise this is more of a topic for a ward meeting than a conservation meeting, but if it became part of the whole plan, perhaps (a big perhaps) people might take more care of them. They are in a way part of the heritage of an area.</p> <p>I look forward to the completion of your work on our unique area.</p>				
15	<p>I am generally in favour of the proposal to widen the conservation area envelope but would comment on the inclusion of some dwellings in Upland Road between Pershore Road and Eastern Road. Fairly recent planning permissions have been granted resulting in the loss of spacious plots with space between the houses being lost which is an overriding feature of Selly Park. (Upland Road nos. 10-14)</p> <p>It is an excellent document which contains good guidance and acknowledges the vast amount of work by Selly Park residents who spent a considerable amount of time in its production.</p>	Y/no objection	Y/no objection	Y/no objection	
16	<p>I assume that you were seeking comments from residents so I would ask you to add these:</p> <p><u>I support</u> the proposed changes to the conservation boundary</p>	Y/no objection	Y/no objection	Y/no objection	The new Article 4 Direction, as consulted on, is proposed for properties on Bournbrook Road only, subject to their inclusion in the conservation area boundary.

	<p>I could not see any changes to the proposed Direction so <u>I am in agreement</u> with that. I think that the draft CAAMP is generally excellent <u>and support it</u>; I am aware that others are providing detailed feedback and I have fed into comments that Richard Batley is sending to you.</p> <p>I have looked with interest at the guidance section. Guidance is helpful and I note that an annual review will take place; however, within the CAAMP is there merit in explicitly encouraging more local vigilance and reporting? If BCC is serious about taking “appropriate action when it is in the public interest to do so” it may be useful to gain the support of the local community by (for example) a dedicated email address for the conservation area enforcement team. Could the CAAMP document be more specific by describing examples of when action might be taken? After all the good effort to produce the proposed CAAMP and changes, it would be disappointing if the local residents were left with the impression that the initiative lacks the drive or “teeth” to make sure guidance to comply becomes action.</p> <p>The CAAMP refers to the non-building aspects of the area, current examples of concern are:</p> <ol style="list-style-type: none"> <li>Boundary trees and hedgerows.</li> <li>Driveways and front gardens</li> <li>Gates and high fences</li> </ol>				
--	---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	--	--	--	--



	<p>Boundary trees and hedges. It is good to note the comment on page 46 that the protection of trees and border hedges is important, my concern is to how this will be done. The commitment to retaining trees and hedges should be emphasised in the clearest possible terms. The Council website sets out requirements within conservation areas for work on trees but there does not appear to be guidance related to hedges and small trees (less than 75mm diameter). If hedges are characteristic to Selly Park where should guidance to protect them be set out?</p> <p>Driveways and front gardens. Page 38 refers to such matters and the pressures arising. Although the proposed Article 4(2) direction refers to hard surfaces does the document set out sufficient guidance as to what is expected and permitted? I think not. In the area there is evidence of:</p> <p>Parking of “transit” style vans on “garden land”</p> <p>Increased size of driveways etc e.g. 103 Selly Park Road, 54 Selly Wick Road and at St Edwards Church the removal of flower beds to increase the “hard standing” surface. These examples may be reasonable but if they require permission in the conservation area it would be useful to have a section of the document that makes it clear. It appears that applications for planning permission often focus on the building, do not address the surrounding area of land and occupiers make changes without permission.</p>				
--	----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	--	--	--	--

	<p>Gates and high fences. The document on page 42 and 43 refers to a presumption in favour of retaining traditional boundary treatments and for developments to demonstrate adequate regard for the character of the area. In my view it is characteristic of this area that properties have front gardens with low walls, fences, gates etc. There has been a tendency for high boundary fences/gates to be constructed, some with electrically controlled gates. Such boundaries create barriers within the street scene and for the community and it would be helpful if these were specifically addressed within the document.</p> <p>Points of detail</p> <p>In the boundary description there is reference to a primary school next to St Edward's Church; this is no longer true the old school site is used as a day-care nursery</p> <p>In that same description it says that church and school are "included in the boundary" this phrase is also used earlier in the boundary description. Is it accurate to state that the boundary includes properties? Perhaps simply "included".</p> <p>The properties listed in the schedule relating to the Direction do not appear to include the properties to be added in Kensington Road, Selly Park Rd, Upland Rd nor the dwelling house next to St Edwards Church (93 Raddlebarn Road).</p>				
--	----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	--	--	--	--

17	<p>Dear consultation officer,</p> <p>I was delighted to attend the meeting at St.Stephens, and was reassured by the officers present.</p> <p>I would like to make some comments about the three items</p> <p>1) The CAAMP is a well-researched and presented document, which includes the history and importance of the area. This is of local significance and should be maintained to reduce the impact of HMO and University housing issues. The parking issues are a problem, however, with the implementation of the clean air zone, increasing parked cars in residential streets. The charging at the Dental Hospital and new Private Hospital, along with issues with reduced spaces at the MAC and parking charges have a serious impact on many patients attending dental appointments. My worry is that patients cannot get to the dental practice, and despite having a cycle rack and limited parking on site - we are having patients late for appointments and stressed especially those wheelchair bound and unsteady elderly people. Some appointments are 2-3 hours long, so future changes to parking cannot impact further on the business.</p> <p>2) The boundary alteration should not affect us as we would have to undergo planning application as per any business premises, and due to the increased demand post COVID-19 we need to be flexible with future plans. I would like a written assurance that the proposed changes would not negatively impact</p>	Y/no objection	Y/no objection subject to no additional planning restrictions	Y/no objection	<p>There is no evidence to suggest that inclusion in the conservation area would negatively impact the value of the premises based on the assumption that planning permission would be less difficult to obtain. As a commercial premises, the Practice does not have the same permitted development rights as residential properties and therefore no additional restrictions would apply. The additional effect of designation would require that any application preserve and enhance the character and appearance of the conservation area.</p> <p>As a commercial property the Practice does not have permitted developments rights for certain types of development. The requirement for planning permission will not alter through inclusion in the designation and no Article 4 Direction is proposed.</p>
----	------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	----------------	---------------------------------------------------------------	----------------	--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

	<p>the value of the premises as planning permission would be no less difficult to obtain. If it does, I would vehemently oppose the extension to include the dental practice, as we have undergone so many recent setbacks with the uncertain financial climate, and I would be forced to sell or close the practice, having a negative impact on the dental health of the local population.</p> <p>3) The Article 4 direction only applies to residential buildings and would not have any change if we needed to alter the facade, replace windows etc., it would be useful to have a written response that this would not have any bearing on the commercial property, as I was led to understand</p>				
18 Selly Park Property Owners Association	<p>I am writing on behalf of the Selly Park Property Owners (SPPOA). The committee met on 27th September and wish to confirm the acceptance of the draft CAAMP document. We consider that it will be a very useful document. The management plan will enable us to uphold and improve the quality of the area, it's identity and heritage as a unique and valued asset within Selly Park.</p> <p>In response to the three questions asked at the public consultation event:</p> <ol style="list-style-type: none"> <li>1. We think the document is well put together and informative, it is a good representation of the area we live in and gives SPPOA a sound baseline to represent the area.</li> </ol>	Y/ no objection	Y/no objection	Y/no objection	<p>The new Article 4 Direction, as consulted on, is proposed to cover the properties on Bournbrook Road, subject to their inclusion in the conservation area boundary. No other additional areas are being proposed for an Article 4 Direction as part of this consultation.</p> <p>Subject to approval of the inclusion of the additional proposed areas within the conservation area boundary, consideration can be given to an Article 4 Direction to cover additional areas. Any such</p>



	<p>2. We are in agreement with the extension of the conservation area. It makes sense to have the covenanted area coterminous with the conservation area and to bring in the areas outlined in the map.</p> <p>3. In respect of Article 4 we remain unclear on whether the Article 4 direction will be extended to all or only parts of the extended conservation area. We wonder what are the criteria for deciding whether all or part of a conservation area are covered by Article 4 and what are the implications of being covered or not. We agreed to leave this issue for the Council's decision. .At the public meeting Andrew Fuller said that "... none, part or all of a designated conservation area can be covered by an Article 4 direction depending on the degree and quality of surviving fabric"</p> <p>Thank you for your help and support during the process of producing this very impressive document.</p> <p>There are four reasons why it is useful for the covenant and conservation areas to coincide:</p> <p>Although covenants are not referred to by local planning authorities, they are relevant to planning issues such as the use of land only for dwelling houses, the minimum size of plots,</p>				<p>proposal will be consulted on at that time.</p> <p>There are no plans to propose an Article 4 Direction on the properties of The Stables or Southbourne Close. The Stables already has permitted development rights removed for extensions and outbuildings and Southbourne Close for boundary alterations.</p>
--	--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	--	--	--	--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

	<p>fences, the set-back distance of houses from roads etc</p> <p>Covenants are recognised by the national Lands Tribunal (now known as the Upper Tribunal of the Lands Chamber). SPPOA has successfully appealed to the Tribunal in the past.</p> <p>It is useful for community organizations and residents to consider these two sources of authority (covenant and conservation rules) together in deciding which can best be used for particular purposes. The cross-referencing of these two sources of authority in the same document is useful to residents and perhaps also to the City Council.</p> <p>At present, the covenanted and conservation areas make up a confusing patchwork. For the most part they overlap - in other words they both apply to most of the area. Where this is so they mutually reinforce each other. However, there are some confusing non-overlaps:</p> <p>The whole of Southbourne Close, lake and woods is in the covenanted area but the conservation area only applies to the woodland and not the houses</p>				
--	---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	--	--	--	--

	<p>The Pershore Road ends of Upland, Selly Park and Kensington roads are in the covenanted but not the conservation area</p> <p>The Stables are neither covenanted nor conserved.</p> <p>SPPOA's committee unanimously concluded that, although there was some deterioration in the quality of the Pershore Road end of Upland, Kensington and Selly Park Roads, their inclusion in the conservation area would allow the community to monitor and limit further deterioration and, where possible, to press for restoration. This is surely what a conservation area is for.</p>				
19	<p>Many thanks for all your work for our area and for running a drop in consultation evening.</p> <p>We are writing in support of the three proposals:</p> <ul style="list-style-type: none"> <li>- for the Conservation Area Appraisal and Management Plan</li> <li>- for the proposed boundary amendments (to include our road and house, in Bournbrook Road)</li> <li>- for Article 4 Direction</li> </ul>	Y/no objection	Y/no objection	Y/no objection	Support from residents of Bournbrook Road for inclusion
20 Historic England	<p>Thank you for consulting Historic England on the above draft appraisal. Whilst recognizing that the local planning authority is responsible for conservation area designation you may</p>	Y/no objection	Y/no objection	Y/no objection	

	<p>wish to note the following observations.</p> <p>The Appraisal follows a logical format that is fully in line with national guidance. There is a clear articulation of how the conservation area evolved through a combination of architectural styles that span a range of periods with a sustained contribution made by open spaces, trees and other vegetation and important views.</p> <p>There is also a succinct and insightful analysis as to how all of this currently contributes to the areas special interest, character and appearance. The conservation area boundary changes suggested have equally clearly been arrived at after thoughtful analysis.</p> <p>Both positive aspects of the conservation area and a range of actual and potential negative changes to its condition over time are carefully itemized and clear prescriptions for future management are suggested that Historic England supports.</p> <p>In this context the role played by Selly Park Property Owners' Association (SPPOA) is to be thoroughly applauded both as regards the production of the Appraisal and in relation to assisting in the positive management of the conservation area going forwards.</p>				
--	--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	--	--	--	--



<p>21 Birmingham Civic Society</p>	<p>Many thanks for giving us the opportunity to comment on the draft CAAMP for Selly Park Conservation Area. Our comments as follows;</p> <p>Whilst we understand the term 'Bauhaus architecture' (p.32) has been used as shorthand for the white stucco faced, flat roof modernist buildings, this is a little misleading since they weren't designed by anyone associated with the Bauhaus (to our knowledge). This is clarified a little (p.34) to locate the style of the houses in the wider Bauhaus movement. No. 102 Selly Park Road was by <a href="#">Sjölander da Cruz</a>, not Sjölander de la Cruz (p.24).</p> <p>We query why Seymour Close has been omitted from the red line boundary - this appears to be a thoughtfully designed post-war housing development of blocks in landscaped grounds with mature trees, as good as those built on the Calthorpe estate by John Madin. There is also an interesting modernist bungalow no. 68 on the entrance to the Close, with a split roof form and sympathetic brick work. We would argue for their inclusion since they contribute to the layered architectural character of the area and continue the tradition of architectural innovation seen in the modernist houses of Kensington Road (as well as the cosmopolitan intent of the Isokon project). We feel that if the Stables and Southbourne Road are to be added there is a worthy case for Seymour Close.</p>	<p>Y/no objection</p>	<p>Y/no objection but propose further areas</p>	<p>y/no objection</p>	<p>Text amended in document to reflect comments.</p> <p>It is recommended at this time that no further inclusions, beyond those currently recommended, are pursued. Any future reviews of the conservation area can assess further areas for inclusion at that time.</p> <p>The bungalows on Kensington Road are proposed for inclusion within the boundary as per proposed boundary amendments map.</p> <p>The grade II listed properties on Pershore Road are not considered to be reflective of the over-riding character of the conservation area and are afforded protection through their grade II listed status.</p>
------------------------------------------------	---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	---------------------------	-------------------------------------------------------------	---------------------------	-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

	<p>It is interesting to note that Philip Sergeant Florence brought forward plans for an Isokon project on the grounds to his house Highfield (128 Selly Park Road), not built due to the restrictive covenants. Some outline details <a href="#">here</a>. This attention underlines the value of modernist development in the CA.</p> <p>We also query why having identified the architectural merit of the National Welsh Slate Quarry bungalows on Kensington Road, they are excluded. Again, we would argue that they contribute the historical and architectural character of this street, built on only one side. There is also a bungalow of particular architectural merit at no.18 Kensington Road.</p> <p>There are three Grade 2 listed buildings, 663-667 Pershore Road/2 Selly Wick Road, 679-681 Pershore Road and 683-685 Pershore Road directly adjacent to the Conservation Area, has any consideration been given to including these properties in the Conservation Area? These of course already enjoy statutory protection.</p> <p>We hope that the boundary of the conservation area would not limit the possibility of a tram line on Pershore Road if this was ever to be restored.</p>				
22 Victorian Society	I can confirm that we discussed the Selly Park CAAMP at our casework meeting last week, and that we don't have any specific comments to make, other than to register our support for the proposed boundary changes.	Y/no objection	Y/no objection	Y/no objection	

23	<p>Omission: It was identified during the public consultation meeting on 7 September 2021 that a photograph of St Edwards Catholic Church was omitted from the CAAMP document and it was agreed that this should be included.</p> <p>Text: to supplement/ replace text on Development history on section 16.</p> <p>“St Edwards Roman Catholic church is located on Raddlebarn Road near the junction of the old roman icknield way at the highest point of Selly Park Conservation area. The building is an imposing early twentieth century Gothic Revival church which is faced in red brick with stone dressings, and the steeply pitched roof is laid with Westmorland slates with coped verges and the glazing is of leaded stained glass.</p> <p>Henry Thomas Sandy of Stafford and G. B. Cox were commissioned to design the building and this was built in three phases by William Bishop of King's Heath with the church and the nave opened on 13 October 1902 by Edward Ilsley, Roman Catholic Bishop of Birmingham and Samuel Webster Allen, Roman Catholic Bishop of Shrewsbury.</p> <p>The sanctuary and side chapels were built between 1925 and 1926 according to a George Bernard Cox design, of Harrison and Cox. The builders were John Bowen and Sons of Balsall Heath and the western end of the church was completed in 1936”.</p>	Y/no objection	Y/no objection	Y/no objection	Text amended and photograph of St. Edward's now included in the document.





Title of proposed EIA	Selly Park Conservation Area Apraisal and Management Plan
Reference No	EQUA906
EA is in support of	New Policy
Review Frequency	No preference
Date of first review	01/07/2027
Directorate	Inclusive Growth
Division	Planning and Development
Service Area	City Design and Conservation
Responsible Officer(s)	<input type="checkbox"/> Julie Shaduwa
Quality Control Officer(s)	<input type="checkbox"/> Richard Woodland
Accountable Officer(s)	<input type="checkbox"/> Andrew Fuller
Purpose of proposal	PRESERVATION AND ENHANCEMENT OF THE CHARACTER OF THE CONSERVATION AREA
Data sources	Consultation Results; relevant reports/strategies
Please include any other sources of data	
ASSESS THE IMPACT AGAINST THE PROTECTED CHARACTERISTICS	Y
Protected characteristic: Age	Not Applicable
Age details:	
Protected characteristic: Disability	Not Applicable
Disability details:	
Protected characteristic: Sex	Not Applicable
Gender details:	
Protected characteristics: Gender Reassignment	Not Applicable
Gender reassignment details:	
Protected characteristics: Marriage and Civil Partnership	Not Applicable
Marriage and civil partnership details:	
Protected characteristics: Pregnancy and Maternity	Not Applicable
Pregnancy and maternity details:	
Protected characteristics: Race	Not Applicable
Race details:	
Protected characteristics: Religion or Beliefs	Not Applicable
Religion or beliefs details:	
Protected characteristics: Sexual Orientation	Not Applicable

Sexual orientation details:

Socio-economic impacts

Please indicate any actions arising from completing this screening exercise. None

Please indicate whether a full impact assessment is recommended NO

What data has been collected to facilitate the assessment of this policy/proposal? Analysis of the character of the Selly Park Conservation Area and drafting of the Selly Park Conservation Area Appraisal and Management Plan and existing boundry. The analysis has informed the key objective of the management of the historic environment and secondry objective of promoting best practice and positive intervention.

Consultation analysis All residents in the conservation area and those affected by the boundary amendments. Local residents groups and amenity socities including Birmingham Civic Society and Victorian Society, and stakeholders Historic England. The overall outcome of the consultation was positive support for the document and the boundary amendments.

Adverse impact on any people with protected characteristics. None identified.

Could the policy/proposal be modified to reduce or eliminate any adverse impact? None identified.

How will the effect(s) of this policy/proposal on equality be monitored? Monitoring and review will take place through the statutory monitoring of the Conservation Areas as required by the Planning (Listed Buildings and Conservations Areas ) Act 1990.

What data is required in the future? n/a

Are there any adverse impacts on any particular group(s) No

If yes, please explain your reasons for going ahead.

Initial equality impact assessment of your proposal The purpose of the policy is to provide formal planning guidance in order to Protect and enhance the Selly Park Conservation Area. The Review proposes a Conservation Area Appraisal and Management Plan, revision to existing boundary and

associated policies that identify the unique architectural and historical character of the Conservation Area. The outcome of this review and recommendations is the prevention of the deterioration of the Conservation Area and development which contributes to the special character of the area.

The Review should have a positive affect on service users and the wider community by ensuring policies are in place which contribute to enhanced environments, better quality design and the protection of local heritage and culture.

A full EA is not required because it is not considered that the revisions proposed will disproportionately impact on any particular group. The revisions will contribute to equality of opportunity for all by providing a statutory planning guidance for change and development which respects the special character of the Conservation Areas.

Consulted People or Groups



Informed People or Groups

Summary and evidence of findings from your EIA

The assessment is that the Selly Park Conservation Area and Management Plan and proposed boundary amendments to the conservation area will not disproportionately affect any protected group. This finding has been tested through implementation of a robust consultation plan that involved representative groups and informed all affected residents. Consultation findings have been subsequently used to review the new policy document and the proposed amendments to the designated area.

QUALITY CONTORL SECTION

Submit to the Quality Control Officer for reviewing?	Yes
Quality Control Officer comments	
Decision by Quality Control Officer	Proceed for final approval
Submit draft to Accountable Officer?	Yes
Decision by Accountable Officer	Approve
Date approved / rejected by the Accountable Officer	06/06/2022
Reasons for approval or rejection	This work will not disproportionately affect any protected group and is approved.
Please print and save a PDF copy for your records	Yes

Content Type: Item  
Version: 44.0  
Created at 10/05/2022 03:32 PM by  Julie Shaduwa  
Last modified at 06/06/2022 05:24 PM by Workflow on behalf of  Julie Shaduwa

Close



**Birmingham City Council**  
**Report to Cabinet**  
**26<sup>th</sup> July 2022**



**Subject:** **St. Agnes Moseley Conservation Area Appraisal and Management Plan**

**Report of:** **Strategic Director Place, Prosperity and Sustainability**

**Relevant Cabinet Member:** **Councillor Ian Ward – Leader of the Council**

**Relevant O & S Chair(s):** **Councillor Saima Suleman, Economy and Skills**

**Report authors:** **Julie Shaduwa, Principal Conservation Officer**  
**Email: Julie.shaduwa@birmingham.gov.uk**  
**Andrew Fuller, City Design Manager**  
**Email: andrew.fuller@birmingham.gov.uk**

Are specific wards affected?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No – All wards affected
If yes, name(s) of ward(s): Moseley		
Is this a key decision?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No
If relevant, add Forward Plan Reference: 010149/2022		
Is the decision eligible for call-in?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No
Does the report contain confidential or exempt information?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
If relevant, provide exempt information paragraph number or reason if confidential:		

## **1 Executive Summary**

- 1.1 This report seeks approval for the adoption of the St. Agnes Moseley Conservation Area appraisal and Management Plan, the adoption of the new boundary and new Article 4 Direction.
- 1.2 This report follows those approved on 24<sup>th</sup> June 2017 (Conservation Area Review Report: Public Consultation), 8<sup>th</sup> February 2019 (Conservation Area Review: Implementation of findings), and 15<sup>th</sup> December 2020 (Conservation Areas Update and Proposals), which together address the Conservation Area Review of all conservation areas across the city. The 2020 report included St.

Agnes Moseley Conservation Area into the wider review following local community aspirations to adopt a new Conservation Area Appraisal and Management Plan.

- 1.3 The Conservation Area Review seeks to consolidate the then 30 conservation areas through merging, boundary changes and management plans / Article 4 Directions. In the case of St. Agnes, the community sought a boundary change, new management plan and Article 4 direction.
- 1.4 The 2020 report therefore authorised the drafting of the Conservation Area Appraisal and Management Plan, Article 4 Direction and boundary change for St. Agnes Moseley Conservation Area, along with approval to go through a public consultation process on these documents
- 1.5 This report provides an update on the work carried out in line with the 2020 report in relation to St. Agnes Moseley Conservation Area, which includes the writing of and consultation on a Conservation Area Appraisal and Management Plan, a proposed new boundary and new Article 4(2) Direction.

## **2 Recommendations**

- 2.1 To approve the St. Agnes, Moseley Conservation Area Appraisal and Management Plan, the proposed boundary changes and new Article 4(2) Direction.

## **3 Background**

- 3.1 The statutory requirements of the Local Planning Authority concerning the designation and management of Conservation Areas is legislated under the Planning (Listed Buildings and Conservation Areas) Act 1990. This is set out in greater detail under paragraphs 5.2 through 5.4 of the 2017 report.
- 3.2 A review of the continued management of all conservation areas within the Birmingham area was undertaken by the City Council in 2017, in accordance with Paragraph (2) of Section 69 of the Planning (Listed Buildings and Conservation Areas) Act 1990. The legislation requires for such a review to be undertaken on a regular basis. Current best practice suggests this should be done every 5 years.
- 3.3 Paragraph (2) of Section 69 also requires that under a Conservation Area Review process, consideration should also be given to further areas which may need to be designated, merged, or altered.
- 3.4 Section 71, Paragraph (1) of the Act requires the local planning authority from time to time to formulate and publish proposals for the preservation and enhancement of any parts of their area which are conservation areas.
- 3.5 Paragraph (2) of Section 71 requires that proposals under this section shall be submitted for consideration to a public meeting in the area to which they relate and under Paragraph (3) that the local planning authority shall have regard to

any views concerning the proposals expressed by persons attending the meeting.

- 3.6 The St Agnes, Moseley Conservation Area was not specifically addressed under the 2017 report but was addressed in the 2020 report due to public support to review the management of the area. The local community were keen to develop, with the Council, new management plans and review the boundary (additions and deletions).
- 3.7 The local community have therefore chosen to work with the Local Planning Authority and produced a draft Conservation Area Appraisal and Management Plan (CAAMP). As part of this exercise it was proposed that the designation boundary could be altered and for a new Article 4(2) Direction to be made and to go to consultation on the proposed changes.
- 3.8 The local community were instrumental in researching, collating and producing the content of the document in line with the standard format of the city council's other CAAMP documents. This included a collaboration between the St. Agnes Residents Association (STARA), the Moseley Society and ward Councillors. The community sought to address the specific challenges of managing the conservation area going forwards for all members of community.
- 3.9 Following approval of the 2020 report the drafting of a new CAAMP was undertaken and a public consultation process was carried out on this draft St. Agnes Moseley Conservation Area Appraisal and Management Plan, the proposed boundary amendments and a new Article 4 (2) Direction.
- 3.10 The public consultation ran for an eight-week period between Monday 12<sup>th</sup> April 2021 and Friday 4<sup>th</sup> June 2021 and a public meeting was held virtually (due to COVID restrictions) on Wednesday 12<sup>th</sup> May 2021. All residents were notified of the consultation by letter and the consultation was advertised in the local press and on the city council's website.
- 3.11 Consultation documents were made available on-line and hard copies were made available in the local area throughout the consultation period.

#### **4 Options Considered and Recommended Proposal**

- 4.1 **Option 1 – Do Nothing:** The Council could choose not to accept the recommendations in this report. However, to not do so would mean that the Council would not be fulfilling its duty to review its Conservation Areas under the Planning (Listed Building and Conservation Areas) Act 1990 or meet the expectations of the local community.
- 4.2 **Option 2 – Approve the Report Recommendations:** To approve the recommendations outlined in Section 2 of this report as part of the Local Authority's duty to review its Conservation Areas under the Planning (Listed Building and Conservation Areas) Act 1990 and effectively manage the Conservation Area.

- 4.3 **The recommended option is Option 2.** To approve the report's recommendations

## **5 Consultation**

- 5.1 The draft St. Agnes Moseley Conservation Area Appraisal and Management Plan, proposed boundary amendments and proposed new Article 4(2) Direction have been consulted on as required by the primary heritage legislation (the 1990 Act) as part of best practice guidance from Historic England. All residents in the existing conservation area were consulted by letter, as well as those properties proposed for inclusion and those proposed for exclusion as part of the new boundary. The proposals were taken to a public meeting in line with the council's statutory duty under Paragraph (2) of Section 71 of the Planning (Listed Building and Conservation Areas) Act 1990.
- 5.2 The local community, particularly the STARA, were instrumental in designing and facilitating the consultation event in partnership with the city council, in delivering the public consultation event plus working with the community to provide access to hard copies of the document and to promote the new management plan and help generate buy-in to the adoption of the document, the proposed boundary and Article 4 Direction by the local community.
- 5.3 Local Councillors in the ward of Moseley, Cllr. Martin Straker-Welds and Cllr. Kerry Jenkins were consulted by email and Cllr. Straker-Welds attended the virtual public meeting. Cllr. Straker-Welds' successor, Cllr. Izzy Knowles, has been consulted on this report. The Moseley Society, the St. Agnes Residents Association (STARA), Historic England, the Victorian Society and the Birmingham Civic Society were also consulted with responses positive.
- 5.4 In total 50 written responses to the public consultation were received. The responses are set out in Appendix 4 along with officer's comments addressing these points. Overall, there was an overwhelming support for the appraisal document with 10 objections to the document. The objections relate mainly to the wording of the character of Oxford Road on pages 21, 26 and 30 and in relation to recent increased traffic levels. In response to these objections the wording on pages 21, 26 and 30 of the document has been amended to reflect the issues raised.
- 5.5 Overall, there was support for the proposed boundary amendments with any queries pertaining more to the recommendation of including even more additional areas within the boundary. It is recommended at this time that no further inclusions, beyond those currently recommended, are pursued. Any future reviews of the conservation area can assess further areas for inclusion at that time.
- 5.6 There were two queries on the proposed boundary amendments relating to the proposed inclusion of some modern properties in Grove Avenue. There was a graphical error on the proposed boundary changes map which prompted these



queries, although the proposed boundary changes map at Plan 1 of the document, as consulted on, is correct. Both queries have been addressed directly with the respondents and there are no objections to inclusion in the conservation area.

- 5.7 There were 4 written responses from residents of Grove Avenue in support of inclusion in the conservation area.
- 5.8 Overall, there were no objections to the proposed new Article 4 Direction. The exiting Article 4 Direction covers the whole of the conservation area and no parts of the conservation area are proposed to have Article 4 Directions removed. The new Article 4 Direction, as consulted on, will include those properties on Grove Avenue, subject to approval of inclusion within the conservation area boundary.

## **6 Risk Management**

- 6.1 There is a risk that failure to adopt the proposed St. Agnes Moseley Conservation Area Appraisal and Management Plan could negatively impact on the long-term management of the conservation area as without an up to date plan for the preservation and enhancement of the area harmful development could take place without effective policy to challenge it.
- 6.2 There is also a risk that if the Conservation Area review recommendations are not accepted, the Council will not be fulfilling its duty under the Planning (Listed Building and Conservation Areas) Act 1990.

## **7 Compliance Issues:**

### **7.1 How are the recommended decisions consistent with the City Council's priorities, plans and strategies?**

7.1.1 The recommendations meet the Council's priorities in terms of "achieving excellence". It will do this by trying to maximise the potential of the St. Agnes Moseley Conservation Area in terms of improving and respecting local heritage to support the local economy and neighbourhoods. In doing this the recommendations will help to meet another of the Council's priorities "We put citizens first" and the Council Plan 2018-2022 (as updated in 2019) objective of: "Birmingham is a great city to live in".

7.1.2 The recommendation is also supported by Birmingham Development Plan Policy "TP12 Historic Environment".

### **7.2 Legal Implications**

7.2.1 The continued management and expansion of the conservation areas seeks to 'preserve and enhance' the 'special architectural or historic interest' of that area (Section 69 of the Planning (Listed Buildings and Conservation Areas) Act 1990).

7.2.2 The designation of conservation areas is undertaken by the Local planning Authority itself, and is a statutory function governed by the Planning (Listed Buildings and Conservation Areas) Act 1990. The Local Planning Authority is under a duty to review existing conservation area designations from time to time.

7.2.3 Article 4 of the Town and Country Planning (General Permitted Development) (England) Order 2015 empowers a local planning authority to make an Article 4 direction and Schedule 3 contains the procedures for making Article 4 directions.

### **7.3 Financial Implications**

7.3.1 Work to review the Conservation Areas and undertake the required consultation was undertaken by staff within Place, Prosperity and Sustainability (Planning and Development) and the costs have been met from the approved Planning and Development revenue budget.

7.3.2 Additional work arising from implementation of this report will be funded from existing approved revenue budgets and staffing within Place, Prosperity and Sustainability directorate.

### **7.4 Procurement Implications (if required)**

7.4.1 There are no procurement implications

### **7.5 Human Resources Implications (if required)**

7.5.1 There are no human resources implications.

### **7.6 Public Sector Equality Duty**

7.6.1 An Equality Analysis screening on the city-wide conservation area review was undertaken in 2017. It is considered that the proposals are still current and will have no adverse impact on the groups and characteristics protected under the Equality Act 2010. However, the St. Agnes Moseley Conservation Area Appraisal and Management Plan recommendation is additional to these previous recommendations and so a supplementary equality analysis has been conducted (see Appendix 5)

## **8 Appendices**

8.1 Appendix 1 – St. Agnes Moseley Conservation Area Appraisal and Management Plan

8.2 Appendix 2 – Boundary map

- 8.3 Appendix 3 – Article 4 Direction
- 8.4 Appendix 4 – Summary of consultation comments and responses of the Council
- 8.5 Appendix 5 Equality Analysis

## **9 Background Documents**

- 9.1 Conservation Area Review Report: 2017
- 9.2 Conservation Area Review: Implementation of findings: 2019
- 9.3 Conservation Areas Update and Proposals: 2020





BIRMINGHAM CONSERVATION  
**AREA**  
CHARACTER  
APPRAISAL AND  
MANAGEMENT  
**PLANS**

St Agnes Moseley Conservation Area  
Character Appraisal and Management Plan

May 2022





# Contents

Foreword	3
Introduction	4
Designation and boundary changes	6
Summary of significance	9
<b>Character appraisal (Part 1)</b>	11
Conservation Area setting	12
Topography, geology and archaeology	14
Development history	16
Townscape character	18
Character areas	22
Pressures on the conservation area	28
<b>Management plan (Part 2)</b>	33
Guidance	34
Enhancement schemes	38
Ongoing management	39
Opportunities for positive future change	40
Appendices	42
Appendix A - Statutory and Locally Listed Buildings	
Appendix B - Wider planning policy framework	
Appendix C - Article 4(2) Direction	
Appendix D - Equality analysis	





The St Agnes Moseley Conservation Area is a unique place and a valued asset through its special architectural and historic interest. It hosts a number of statutory listed buildings in the four principal character areas in the Conservation Area, including the landmark church of St Agnes itself. It is an essential part of Moseley's identity and heritage, and is special to Birmingham as a whole.

This Character Appraisal and Management Plan provides policies to ensure that the Conservation Area will be protected and enhanced and will continue to contribute fully to Moseley as a successful suburb of architectural, historic and environmental merit.

The Management Plan sets out the policies for future development in the area and highlights opportunities for improvement. This is informed by the Character Appraisal which identifies what makes the area special and defines its character.

I am committed to ensuring that this asset endures for the enjoyment of future generations of Moseley. This can be achieved by continuing to work together with local people, community organisations, landowners and other public/private sector partners.

I wish to express special thanks to Dr Terry Slater (Hon Senior Research Fellow at the University of Birmingham) and Bob Edmonds who provided the draft text and photographs (which are their copyright), and to the St Agnes Residents' Association and the Moseley Society for their role in helping to prepare and deliver this document.

**Councillor Ian Ward**  
Leader,  
Birmingham City Council.



# Introduction

The Planning (Listed Buildings and Conservation Areas) Act 1990 places a duty on local authorities to designate conservation areas and from time to time review the designation. It also requires them to formulate and publish proposals for the preservation and enhancement of these areas.

The St Agnes, Moseley Conservation Area (CAAMP) was designated on 25th June 1987 in recognition of its status as a well-preserved Edwardian suburban housing area containing examples of the work of almost all Birmingham's most prominent Arts and Crafts architects of this period. It was extended on 31st July 2009 and an Article 4 direction was placed on the whole area.

Conservation Area status gives the City Council additional powers with regard to demolition, minor development and the preservation of trees. It also places a duty upon the City Council to pay special attention in the exercise of its planning functions to the desirability of preserving or enhancing the character or appearance of the Conservation Area.

Local authorities are required by national planning policy (National Planning Policy Framework paragraph 186) to have a suitable evidence base for historic environment and heritage assets. For Conservation Areas this usually takes the form of a character appraisal which is then used to inform a management plan that sets out policies and proposals to aid the preservation and enhancement of the area.

The Birmingham Development Plan was adopted on 10th January 2017. The current local policy is the Moseley Supplementary Planning Document of 2014. This sets out the vision for the quality of the local environment and sense of place.

The CAAMP aims to:

- Identify the special interest of St Agnes Moseley Conservation Area and provide an evidence based definition of its character.
- Provide a sound basis for the determination of planning applications within the Conservation Area and the formulation of proposals for its preservation and enhancement.
- Identify opportunities and threats to the special character of the Conservation Area and provide proposals to address these potential issues.
- The CAAMP will be adopted as a 'material consideration' in the planning process and has been prepared in accordance with policies listed in Appendices B and C.





# Designation and boundary changes

The St Agnes Moseley Conservation Area was designated on 25th June 1987 and extended on 31st July 2009. An Article 4 Direction was placed on the whole Conservation Area on the same date.

The St Agnes Moseley Conservation Area covers an area of approximately 28 hectares and is located one mile (1.6km) to the south-east of Moseley village centre in the area historically known as Moseley Wake Green. It is some 4 miles (6.4km) south of Birmingham city centre and is, from May 2018, entirely contained within Moseley Ward in Hall Green Constituency.

The boundary of the St Agnes Conservation Area was reviewed through public consultation in 2021 and amendments to the boundary proposed as follows:

The Local Authority considered the modification of the Conservation Area boundary on its western side to include the many well-maintained Arts and Crafts houses in Grove Avenue, built in a similar period to many other properties which are characteristic of the Conservation Area.

In addition, the boundary would be extended to the east to include the narrow strip of land in front of the modern houses at the extreme eastern end of St Agnes Road. This consists of part of the historic sandstone wall and a group of fine trees (pines and horse chestnuts) which would thereby be subject to conservation area tree protection.

The boundary review also proposed to exclude from the Conservation Area the two modern bungalows (Nos.25-27) in Shelsley Drive, (to the rear of 30 St Agnes Road) and the newly constructed house built on the rear garden of No.50 Cotton Lane (No 48.Cotton Lane) at its junction with Oxford Road.

Following the outcome of the public consultation, the Conservation Area boundary was re-drawn to the south west to include all the properties fronting Grove Avenue except for Nos.55 and 57. To the north east it includes all properties facing Grove Avenue on the north side as far as, and including No.2, together with properties Nos.9-25 on the south side of the road (Plan 1). A total of 48 additional houses are now included within the Conservation Area, 12 of which were constructed post-WWII (Plan 2).

The boundary was also re-drawn to include the strip of land to the east of St Agnes Road and to exclude the modern properties on Shelsley Drive and Cotton Lane.

The amended Conservation Area boundary now runs down the centre of St Agnes Road from Wake Green Road as far as the northern boundary of No.8 (Harris House) and then to the rear of the remaining properties on the east and north sides of St Agnes Road as far as Yardley Wood Road.

The boundary then runs south along the central reservation of Yardley Wood Road before turning west up St Agnes Road as far as the eastern boundary of No. 47, excluding the 1960s' terrace of small houses on the south side of St Agnes Road.

The boundary then encloses the remaining houses on the south side of St Agnes Road (including the modern cul-de-sac of Mulberry Drive) as far as the western boundary of No.35 Dyott Road.

The boundary then moves to the centre of Dyott Road, excluding the houses on its south side as far as the parish hall of St Agnes church, which is included in the Conservation Area. The boundary then crosses Billesley Lane and proceeds up the centre of Greenhill Road enclosing the houses on its north side as far as No.47. It then follows the western boundary of No.47 along the rear of the garage court of Poulton Close, and then north-westwards along the back-property line dividing Poulton Close from Oxford Road as far as Cotton Lane.

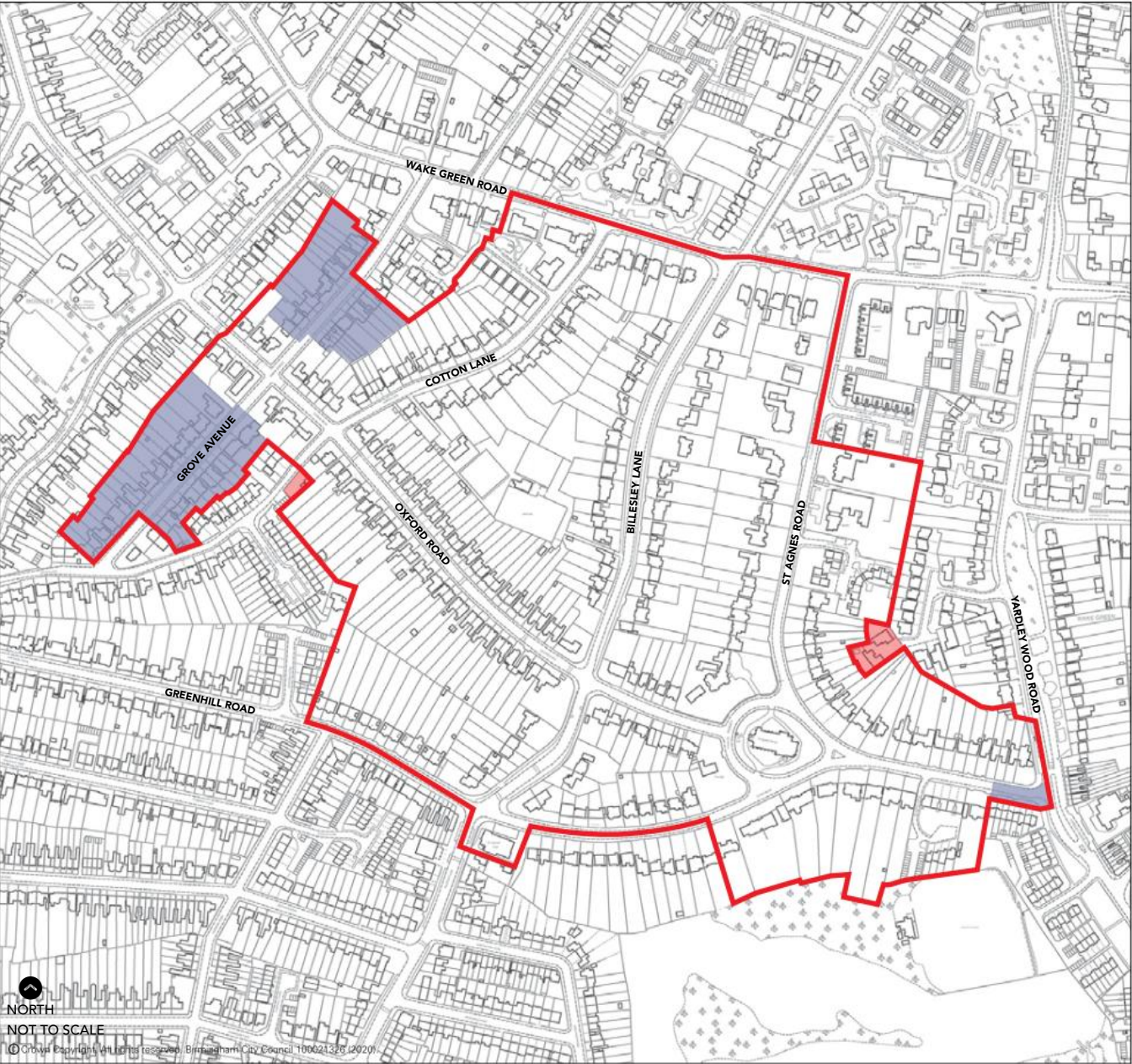
The boundary then runs south west along the rear gardens of the south eastern side of Grove Avenue, enclosing the houses as far as No.53, and then travels south west to the junction with Cotton Lane. From here it travels north west enclosing the boundary of No.60 Grove Avenue. It then runs north east along the rear gardens of the west side of Grove Avenue, enclosing the properties on both sides of Oxford Road as far as Nos.46 and 49, continuing up to and including No.2 Grove Avenue. The boundary follows the north eastern boundary of No.2 and then travels south west then south east along the north eastern boundary of No.9. It then turns north-east to follow the rear boundary of the properties on the north-west side of Cotton Lane as far as Wake Green Road, where it follows the centre line of the road back to St Agnes Road.

The roads enclosed by the Conservation Area boundary are the eastern and western sides of Grove Avenue; the eastern portion of Oxford Road; the northern portions of Cotton Lane and Billesley Lane; St Agnes Road; Colmore Crescent; the north sides of Dyott Road and Greenhill Road, and the south side of Wake Green Road. There are some 280 historic houses and three small estates of modern houses (St Agnes Close, Mulberry Drive and Manor Park) within the Conservation Area, together with St Agnes Church, St Agnes Church Hall, and Moseley Tennis Club.



The west side of Grove Avenue, north of Oxford Road. It is suggested these houses be included in the Conservation Area.





**Plan 1**  
St Agnes Moseley Conservation Area boundary.

- Key**
- Conservation Area boundary
  - New additions to the conservation area following 2022 adoption
  - Removals from the conservation area following 2022 adoption

# Summary of significance

The St Agnes Moseley Conservation Area is valued for its special architectural and historic interest for the following reasons:

- It has a remarkably unified character and is one of the most representative Edwardian suburbs in Birmingham. The houses were first occupied by professionals, commercial business owners, and industrialists of some note in the economic development of Birmingham. The group of houses in Oxford Road/Dyott Road occupied by members of the Lanchester family are an important link with the early history of the motor car industry in the west midlands. The Conservation Area remains a primarily professional suburb today.
- It is almost entirely characterised by Arts and Crafts style houses built in the Edwardian building boom of 1900-1910. Most of these houses were architect designed by prominent Birmingham architects, now with a national reputation for their houses.
- Further development took place in the mid-1920s, but the houses from that period followed the Arts and Crafts tradition of their predecessors.
- The houses are set in large gardens and are generally set well back from the plot frontage. The larger houses often have sweep drives and double entrance gates. Front gardens are characterised by large mature trees, evergreen shrubberies and dense planting; Street trees add gravitas to some streets.
- The late Victorian (1884) St Agnes Church forms the architectural focus of the Conservation Area. As the area developed through the twentieth century four distinct character areas have emerged
- The earliest very large detached houses in St Agnes Road with extensive gardens and the slightly smaller houses in Wake Green Road.
- The smaller, mostly semi-detached, houses of Oxford Road between Grove Avenue and Billesley Lane with their profusion of Arts and Crafts detailing and the later, interwar semi-detached houses in Greenhill Road.
- The larger houses of Oxford Road north west of Cotton Lane, and the varied houses of Grove Avenue. These include both late Victorian houses, three-storey semi-detached Arts and Crafts houses of the Edwardian period and numerous post-WWII houses. The plots on the south-east side of Grove Avenue have all been sub-divided to allow development in their back gardens facing Cotton Lane.
- The more architecturally mixed housing along Billesley Lane and Cotton Lane. Much of this character area was built in the mid-1920s and there are numerous post-WWII houses here too.

These character areas are analysed in more detail in the 'Townscape Character' section.



Cotton Lane from Oxford Road. All trees are in private front gardens.





St Agnes Moseley Conservation Area

PART 1  
CHARACTER APPRAISAL



The Conservation Area is surrounded by other residential areas, mostly developed later in the 1930s and 1960s building booms. The open space of Moseley Golf Course bounds the properties on the south side of St Agnes Road and Dyott Road.

Yardley Wood Road, which bounds the east side of the Conservation Area, leads southwards to the further open space of Joys Wood and Moseley Bog, and Swanshurst Park beyond. Wake Green Road, which forms the northern boundary, is a bus route and major traffic artery but is softened by many mature trees in the front gardens of houses on both sides of the road.

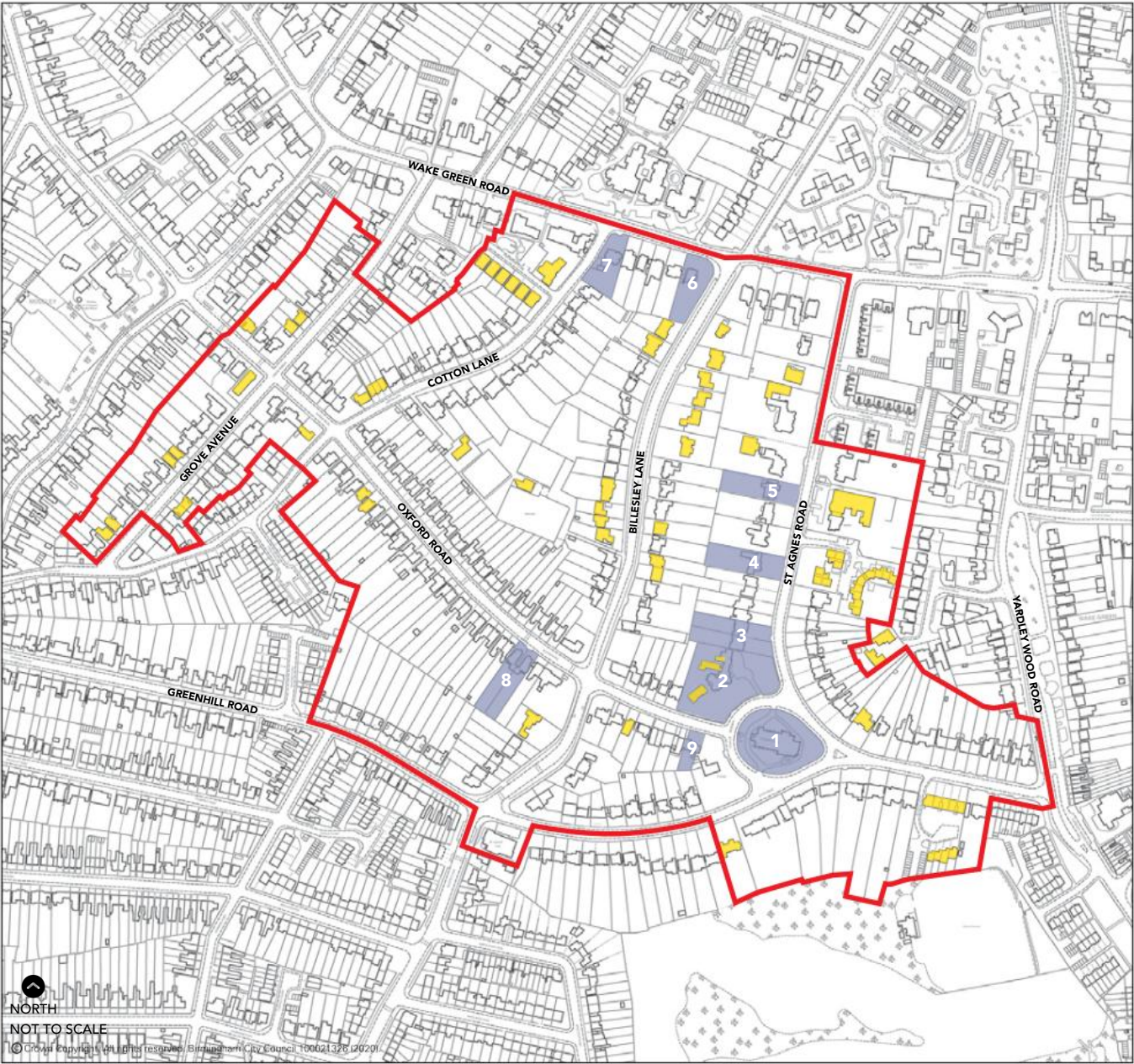
The junction of Yardley Wood and Wake Green Roads is marked by large-scale 1960s' developments of private flats and their garage courts, including the tower block of Moseley Court. Wake Green Court, the largest of these developments, has again preserved large numbers of mature trees from the former gardens of older houses which preceded the redevelopment.

There are culs-de-sac of small 1960s' houses to the west of the Conservation Area (Poulton Close and Ashdown Close) and a small estate of council homes south of St Agnes Church Hall (Northlands Road). The boundaries are less distinct at the western end of Oxford Road where it intersects with Grove Avenue because development took place over a long period and housing styles are much more mixed.

Beyond the south-west end of Grove Avenue the Conservation Area adjoins the late-Victorian development of Greenhill, Prospect, and Cambridge Roads. The eastern boundary of Moseley Village Conservation Area is 400-500 metres further to the west of the Oxford Road boundary.



50 St Agnes Road.



Plan 2  
Listed buildings.

Key		
	Conservation area boundary	
	Listed buildings	
1	Church of St Agnes	7 40 Wake Green Road
2 1 (Tudor Lodge) Colmore Crescent		8 110 and 112 Oxford Road
3 25 and 27 St Agnes Road		9 130 Oxford Road
4 15 St Agnes Road		
5 9 St Agnes Road		
6 50 Wake Green Road		Post WWII buildings



# Topography, geology and archaeology

The almost flat Birmingham plateau is some 150 metres above sea level at this point and the Conservation Area lies on the eastern side of the ridge between the valleys of the Rivers Rea and Cole.

St Agnes Church stands on the highest point and the view from the top of the tower extends for many miles in all directions. Greenhill Road, Dyott Road and the southern part of Billesley Lane slope downwards into the valley of a small stream that flows eastwards from the Billesley Lane allotments through Moseley golf course.

The underlying geology is Mercian Mudstones sandstones and shales (formerly known as Keuper Marl), but the plateau summit in this area is covered with a substantial depth of glacially-deposited sands, gravels and pebble beds. The

soils are therefore free-draining and infertile. The houses on the south side of Dyott Road have all required under-pinning since their construction and St Agnes' Hall sits in what was formerly a commercial sand pit.

There has been no archaeological exploration within the Conservation Area and cartographic evidence suggests that until housing development took place the whole area was farmland. The nearby Moseley Bog nature reserve contains a burnt mound which has been excavated.





# Development history

## Development history

Moseley Wake Green spanned the historical boundary between the parishes of Kings Norton and Yardley.

The boundary followed Billesley (Bully) Lane. Both parishes were very large and there were many smaller settlements within their bounds. Moseley is recorded in Domesday Book (1086) as one such settlement. Moseley became an independent parish in 1852.

Wake Green was a large square shaped common at the parish boundary until it was enclosed in 1830. The construction of the Birmingham and Gloucester railway through Moseley in mid century began its suburban development, which was further enhanced by tram services to Birmingham along the Alcester Road. A number of large mansions were constructed on Wake Green Road four of which were in the bounds of the later Conservation Area. Only one ('The Dingle') survives, since it was later converted to institutional use by the University of Aston (Gracie Hall). It has subsequently been converted to apartments.

The land between Cotton Lane and Billesley Lane was owned by the Kings Norton Charities trustees and there were two houses here, Charlton Lodge and The Laurels, both of which were subsequently to be demolished. Wake Green House, the largest of the four early houses, stood in extensive grounds between Billesley Lane and St Agnes Road (see Plan 3).

It was owned by Francis Willmot, a surveyor, whose family was responsible for its development as a building estate.

## Designing a suburb

By the early 1880s, more densely built suburban development was taking place in Moseley and Kings Heath between the railway and Billesley Lane. The owners of the large houses on Wake Green Road therefore took the opportunity to develop their land in a similar way.

The first edition Ordnance Survey maps were surveyed in 1882-83 and catch this moment just as the new roads were being laid out. St Agnes Road and Dyott Road are shown, as is Grove Avenue, though it was not constructed until 1889. Oxford Road had not advanced beyond its junction with School Road (Plan 3).

These were also the years in which Francis Willmot persuaded the Vicar and Parochial Church Council of St Mary's, Moseley that their plans for a new church 'for the poorer people' of the community might be advanced if he donated the site at the junction of the newly constructed St Agnes and Dyott Roads. This was not, of course, entirely altruistic on his part as any new upper middle-class suburban estate was enhanced by an Anglican church in the later nineteenth century. The first phase of the church was built in 1883-84 and Colmore Crescent completed its distinctive island site.

The Crescent was respectfully named after the Vicar of Moseley, Canon William Colmore, and the church dedicated in his wife's name. The church was to remain standing in the fields of Wake Green House for another 15 years or more before house building began in earnest on

the estate at the turn of the century. The Willmot family was later to donate more land for the site of the Vicarage in Colmore Crescent in 1905, and to sell the plot in Dyott Road for the church hall in 1921.

The first new houses on these two estates were built in the late 1880s and 1890s in Cotton Lane, Grove Avenue, the south side of St Agnes Road near Coldbath Farm, and the north end of the same road, near Wake Green Road. Some of these houses survive, but others have been demolished. Development was also ongoing along Oxford Road but this road was not extended beyond School Road until 1902.

Almost immediately architectural fashion changed and these large, high-roomed houses were succeeded by the Arts and Crafts styles which dominate the Conservation Area and which were mostly constructed in the Edwardian building boom of 1895-1910.

The two architects whose houses are most numerous are W De Lacy Aherne with houses of all sizes in St Agnes Road, Oxford Road, Wake Green Road and Cotton Lane, and J Brewin Holmes, who built two pairs of large semi-detached houses in St Agnes Road and designed many of the smaller houses on the north side of Oxford Road, all in 1904-06. Most of these smaller houses were built speculatively, for rent or purchase, and often landowner, architect and builder worked cooperatively with each taking a share of the profits.

## The inter-war period

The identical pairs of semi-detached houses in Greenhill Road and the west side of Billesley Lane were built in 1923-26 to designs by George Payton. Other houses were built in this period in Cotton Lane, Billesley Lane and the eastern part of Oxford Road, all in the Arts and Crafts style, and infilling undeveloped plots.

The most prominent group in the Conservation Area are on the west side of Billesley Lane, built in 1925 and designed by Lloyd Ward. This road was widened by the city council to improve traffic flow, and grass verges and lime trees were planted in 1928.

## Post World War II

There were still a surprising number of empty plots or very large gardens backing on to Billesley Lane which remained undeveloped after 1946. With the next building boom of the 1960s, housing fashions had changed. The large houses of the Conservation Area were going to institutional use, or were being sub-divided for flats. Consequently new houses were much smaller and mostly in Anglo-Scandinavian styles. A number of houses were demolished and small estates of flats or maisonettes built, whilst other plots were divided so that additional housing could be built in the back gardens, or beside the original house in the front garden.

By the 1980s this part of Moseley was increasingly the abode of the professional classes - doctors, lawyers, lecturers, teachers - who appreciated the quality of the houses and the size of the gardens (as well as the excellent local schools). It was this group who were instrumental in founding both The Moseley Society, and local residents' associations for St Agnes Road and Oxford Road.



# Townscape character

The built character of the Conservation Area reflects Moseley's growth as a local centre and is defined by a period of rapid development between the 1890s and the 1930s. The majority of its buildings belong to this period.

## Building types

With the exception of St Agnes church and its parish hall and two large care homes, the Conservation Area is characterised entirely by residential buildings in a variety of domestic styles of the period between 1890 and 1990.

## Architectural character

The first houses in the Conservation Area were built in the late 1890s. These houses were in what was called the 'Old English' style favoured by architects such as Norman Shaw. They are in red brick, of three storeys, with steep-pitched clay tile roofs, impressive chimney stacks and large windows on the principal storeys. A good example is 'Hilver' (5, St Agnes

Road). The two pairs of semi-detached houses on the north side of St Agnes Road, facing the church, are a variant characterised by exuberant terracotta decoration on their facades.

The Arts and Crafts style houses of the Edwardian building boom are of two types. In the northern part of St Agnes Road, they are of a similar size to their 'Old English' predecessors but are characterised by substantial structural timbers, part roughcast or plastered walls, highly decorative chimney stacks, bay windows and smaller leaded light windows (often with stained glass), wrought iron fixtures and fittings and a plethora of decorative detail.

The second type use a similar palette of materials but the houses are smaller, often semi-detached and of only two storeys (though there are often rooms in the attic roof spaces). They often lack garages and stand closer to the street frontage, on narrower but lengthy plots. These houses are typically found in Dyott Road, Cotton Lane and especially in Oxford Road.

The 1920s' semi-detached houses in Greenhill Road and Billesley Lane are a single development and are simpler in style, two storeys, with roughcast fronts and less decorative detail.

## Building materials

High quality red brickwork is the principal building material in the Conservation Area. Architectural details are rendered in limestone or sandstone. Structural timbers are found in gables and porches. There is also use of roughcast or smooth plaster to cover parts of the elevation or to define an architectural element.

Traditional roofing materials are clay tiles. There are only a few slate roofs, most notable are the Westmoreland slate roofs on four pairs of semi-detached houses in Oxford Road. Chimneys are brick with clay pots. Window frames were originally of wood, though some casements were in wrought iron. Bay or dormer windows are covered in clay tiles or decorative leadwork.

Boundary and retaining walls are constructed in sandstone blocks or limestone 'bricks'. Gates are of wood or wrought iron. Holly was the main hedging plant in the early part of the twentieth century and the sandstone walls and holly hedge which surround St Agnes churchyard is an important townscape feature.

## Stained glass

Stained glass is characteristic of both the Art Nouveau and Art Deco periods and there are good examples of both in the Conservation Area. There are fine examples of the earlier style in Oxford Road houses and Art Deco makes an appearance in Billesley Lane and in some of the less exuberant glazing bar patterns elsewhere.

## Height and scale

Buildings are characteristically domestic in scale, almost uniformly of two or three storeys, with steep-pitched roofs. The majority of the houses in St Agnes Road and the west side of Cotton Lane have taller floor to ceiling heights than their neighbours but conform to the overall domestic scale.

## Street pattern

The street pattern in the area forms a largely coherent and legible framework. Wake Green Road and Yardley Wood Road, which bound the Conservation Area to the north and east are main traffic arteries and bus routes. Billesley Lane marked the boundary between the two historic parishes of Moseley and Yardley. It was widened and

straightened in 1928. Other roads in the area were provided by developers as suburban house building got under way and almost all curve gently.

## Views

St Agnes church provides the dominant townscape feature in the Conservation Area. Centrally located on a roundabout there are good close-up views of the building from all sides, the south front seen from across Dyott Road is probably the finest.

There are longer sequential views of the east end of the church along the length of the east-west part of St Agnes Road and of the west tower along that part of Oxford Road east of Billesley Lane. The

gentle curves of Billesley Lane, with its grass verges and lime trees, provide good sequential views in both directions.

Intimate views through gateways into the large front gardens of houses in St Agnes Road are an important part of the character of that street. St Agnes church hall acts as the southern gateway to the Conservation Area at a crossroads junction but, since it stands at the lowest point topographically, it is not a significant view focus.

The only significant view out from the Conservation Area is from the eastern end of St Agnes Road at its junction with Yardley Wood Road. The view southwards into the valley of Moseley Bog and beyond is both extensive and attractive.

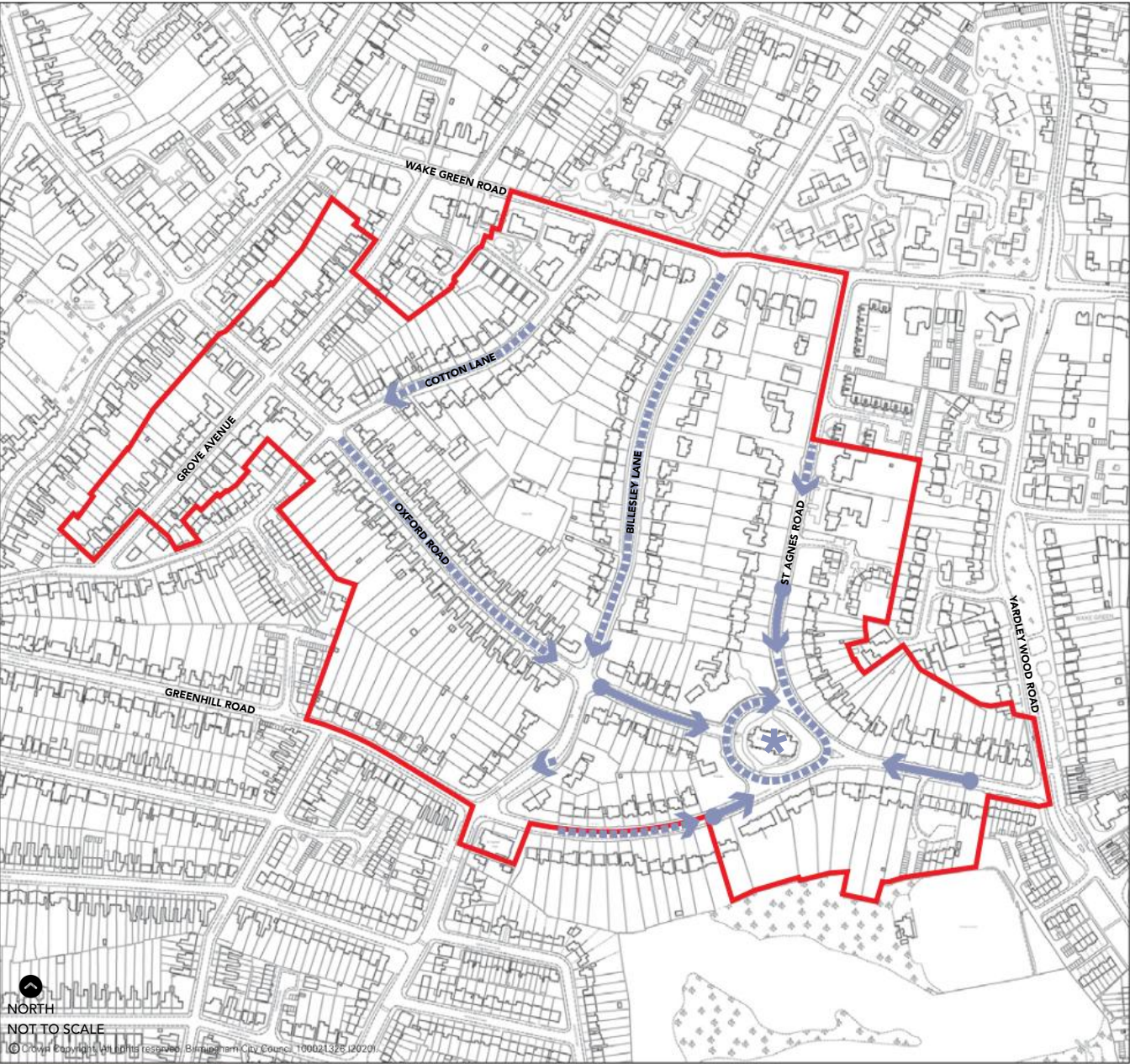


'Hilver' 5 St Agnes Road.



133 Oxford Road - decorative brickwork and ornate chimney stack.





Plan 4  
Conservation Area views.

- Key**
- Conservation area boundary
  - Landmarks
  - Key views
  - Sequential views

**Open space**

The churchyard of St Agnes church is the principal open space in the Conservation Area. It is of considerable townscape significance because of its location at the junction of four of the roads in the area and its distinctive oval form bounded by sandstone wall and holly hedge. Its grass, spring bulbs and many trees provides a pleasant space for contemplation. Moseley Tennis Club’s courts, between Billesley Lane and Cotton Lane, provide a second, private, open space which is significant for those whose properties bound it but which can hardly be seen from the street. There is a small ‘pocket park’ open space/play area off Manor Park Close.

**Gardens**

Private gardens are an important feature throughout the Conservation Area but, of particular significance, are the front gardens of 130 Oxford Road, 25-27 St Agnes Road, and 42 Billesley Lane, which retain their original design and landscaping from their first building. Every effort should be made to encourage their owners to preserve the layout and materials of these gardens.

**Paving, street furniture and information**  
Street surfaces throughout the area are uniformly of asphalt and provide an appropriate neutral foreground to the houses. Pavements are likewise uniformly of asphalt with granite kerbs. St Agnes Road has very distinctive kerbs, gutters (smooth concrete slabs with white stone edgings) and dropped entrance kerbs (white limestone blocks) which had been partially hidden by inappropriate road maintenance.

Street furniture in the area consists almost entirely of standard designs. Lighting columns are functional and unobtrusive, in the standard LED format. Some could have

been placed with better regard for adjacent buildings. The two almost adjacent columns on the island to the east of St Agnes church are particularly obtrusive. Street name signs are a mix of standard aluminium plates and the historic cast iron plates used by the Council at the beginning of the last century. These are an important feature of the area.

The St Agnes Residents’ Association has provided a timber information board facing the street on the south side of St Agnes churchyard. The board includes a map of the Conservation Area and is in good order. The Residents’ Association have also provided a replacement timber bench on the island to the east of St Agnes facing the church together with two planters which they maintain.

**Trees**  
Front gardens are characterised by mature trees, evergreen shrubberies and dense planting; even the smaller gardens of Oxford Road usually have at least one smaller tree (such as a birch or a maple). The street plane trees in St Agnes Road (north end) and Oxford Road (east end) add gravitas to the views of St Agnes, whilst the lime trees in Billesley Lane and their associated grass verges emphasise the curves in the road and are fine mature specimens. St Agnes churchyard is ringed by mature sycamore trees together with more recently planted exotic species.

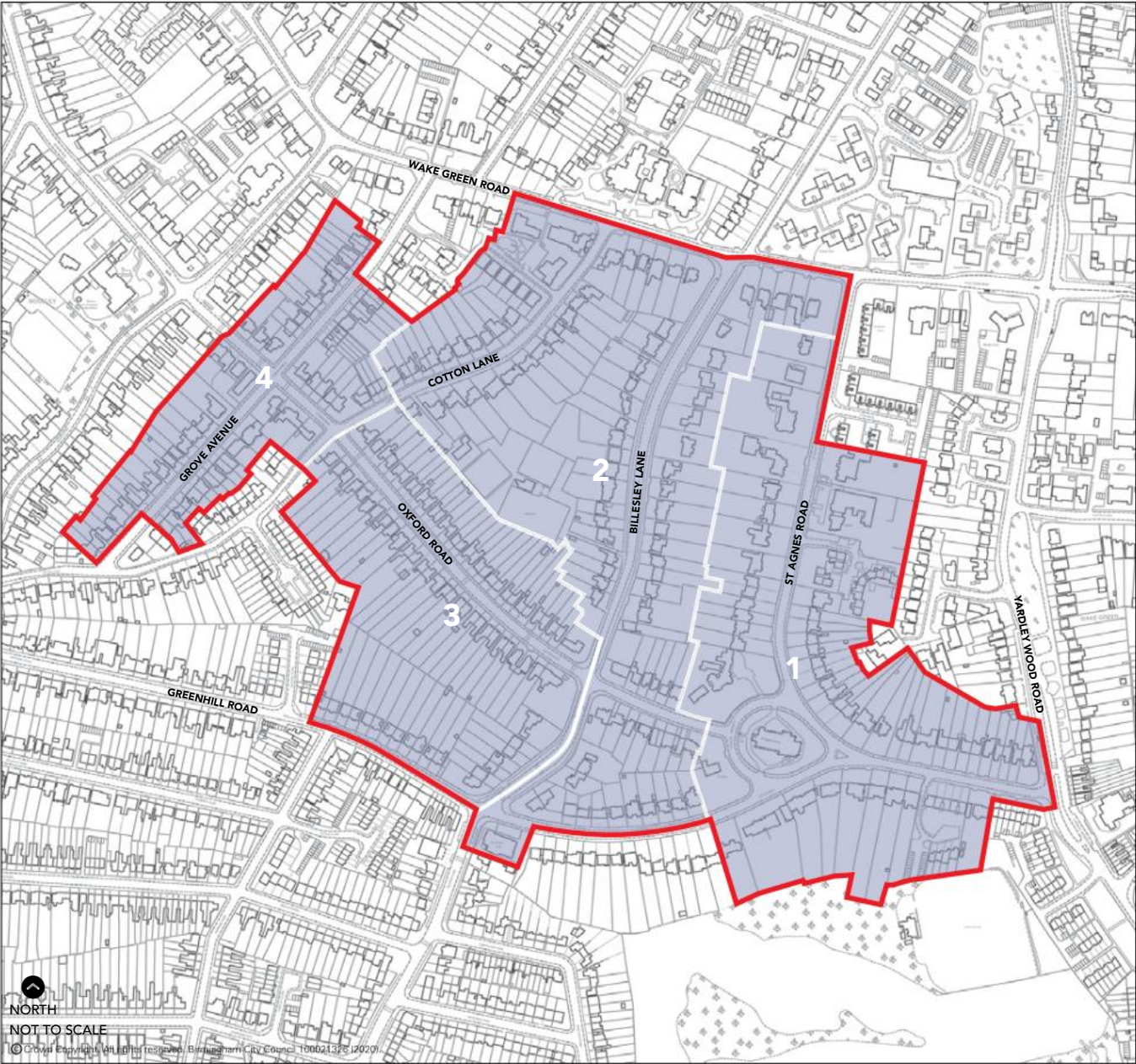
There are exceptional mature large trees in a number of private gardens (front and rear) though regrettably they have been reduced over the past decade despite the protection inherent in Conservation Area designation. Holly hedges are an important part of the streetscape; the original hedge and sandstone wall fronting the Avon Drive estate, just outside the Conservation Area, provides a link to former properties here; that in front of Mulberry Drive could do the same if pruned.

**Traffic and pedestrian movement**  
Despite their origin as characteristically quiet, suburban residential streets there has, in recent times, been an increased flow of traffic through the Conservation Area. Traffic levels have been exacerbated in parts of the conservation area through the introduction of a Low-Traffic Neighbourhood scheme (LTN) in the area from 2020 which has increased traffic flow through some of the traditionally quiet streets and had a negative impact on the character of the area. This has been particularly notable on Billesley Lane and Oxford Road, both of which have been subject to previous positive traffic calming measures such as speed humps, mini-roundabouts and to the recent introduction of 20mph speed limits. On-street parking is most problematic in Oxford Road since few of the houses originally had garages and front drives are not long enough to accommodate more than one car. At present there are no special provisions for cyclists.

Pedestrian flows are heaviest along Oxford Road and Billesley Lane. During the week Moseley Church of England School generates both pedestrian and car movement along Oxford Road, whilst a popular small store just beyond the Conservation Area does the same in Billesley Lane. The tennis club and St Agnes Hall also generate flows at particular times. However, pedestrians do not make major impacts on the area.



There are four broad character areas that can be distinguished within the Conservation Area and its recommended extension, though each could be further sub-divided given the diversity of house types.



Plan 5  
St Agnes Moseley Conservation Area Character Areas.

Key

- Conservation area boundary
- 1. St Agnes Road, Colmore Crescent and Dyott Road (south side)
- 2. Cotton Lane and parts of Billesley Road and Wake Green Road together with the eastern part of Oxford Road and the north side of Dyott Road
- 3. The western part of Oxford Road and Greenhill Road
- 4. Grove Avenue and the western end of Oxford Road

1. St Agnes Road, Colmore Crescent and Dyott Road (south side)

This area is distinguished by the largest houses standing in very large plots with St Agnes Church acting as the main focus of the townscape. It includes two small estates of modern houses (Mulberry Drive and St Agnes Close) built on amalgamations of two or more of these plots in the 1960s and 1980s respectively. This part of the road is lined with large plane trees. The area contains the most architecturally distinguished houses, including five of the listed buildings in the Conservation Area.

St Agnes Road is 'L'-shaped. The north-south section contains the most important group of houses in the Conservation Area. Garden walls are mostly rusticated sandstone or limestone blocks and the plots have double entrances with sweeping drives and numerous mature trees, evergreen shrubs, and hedges.

The Arts and Crafts houses on the west side of the road (odd numbers) are interrupted only by the large modern dormer bungalow at No.3. Nos.5-9 have been sympathetically restored to domestic use after 40 years as the Lucas Training Centre. No.13 has had a new porch and replacement garage constructed to very high specifications. Although some of the large trees have been removed from front gardens, all the properties on this side of the road are in exceptionally good order.

The eastern side of the road has fared less well over the past fifty years. No 8, 'Harris House', is

atypical in that it was Victorian Jacobean in its architectural details but it has recently been restored and converted to an apartment.

Nos.10-12 are now Mapledene Nursing Home which consists of a purpose-built accommodation block linked to the conserved Mapledene house (originally No.12) built in 1915 to designs by Marcus Type. The whole provides a satisfactory ensemble of new and old with well-maintained shrubberies and lawn. The adjoining cul-de-sac development of sheltered apartments forms St Agnes Close and dates from the 1980s.

Where the road curves past the church, Nos.32-38 consist of two pairs of remarkable three-storey, double-fronted, semi-detached houses which are very different from the other properties in the Conservation Area. They are dominated by terracotta detailing (one pair reddish, the other orange). The front garden walls are also in terracotta and are an important part of the ensemble. Nos 46 and 48 are a semi-detached pair with dark red terracotta detailing further along the road by the same architect.

The section of St Agnes Road running eastwards from the church to Yardley Wood Road has a somewhat different character. There are no roadside trees, but there are mature forest trees in many of the front gardens beside the pavements, which are an important part of the streetscape.

With three exceptions the north side of the road consists of semi-

detached houses, eight of which are matching pairs. There is much stained glass in the ground floor windows of these properties. The detached houses include No.44, 'Llanherne', which is one of George Pepper's extraordinary houses consisting of a three-storey tower beside a two-storey block with brick and stone ground floor, and ornate timber-framed first floor. Another is No.50, an attractive large double-fronted 'Queen Anne'-style house whose only comparator is St Agnes Vicarage.

The south side of the road is different again. The houses are mostly larger, two-storey with high rooms and attics and are more Victorian in character in 'Old English' style. No.45 was demolished in the 1960s and Mulberry Drive cul-de-sac constructed with a flat block on the street front with garage court and four houses to the rear. The retention of the sandstone front wall and holly hedge means that it does not intrude untowardly.

On the south side of Dyott Road Nos.35-41 are Edwardian Arts and Crafts in character. No.41 has a particularly fine studio window on the first floor since it was built for an artist. The house and its gardens have been immaculately restored by its former owners, including the replacement of a concrete-tile roof by clay tiles.

Nos.37 and 39 have broad frontages signifying their important position opposite St Agnes Church.

Colmore Crescent, to the west of the church, has only two houses. Ashley Lodge is described in



Appendix A since it is a Listed building; the other is the Vicarage of St Agnes Church (No.5). It was built in 1922-23 to designs by Charles Edward Bateman, another of Birmingham's leading Arts and Crafts architects. The house is roughcast, with a hipped tiled roof, in a symmetrical Queen Anne style.

The Vicarage stands in a very large plot (there was originally a full-sized tennis court in the rear garden) with sandstone walls and impressive gate piers with large ball finials.

St Agnes Church forms the centrepiece of this character area. Architectural and historical details are provided in Appendix A, on Listed Buildings.



Mapledene nursing home - Marcus Type 1915.

## 2. Cotton Lane and parts of Billesley Lane and Wake Green Road together with the eastern part of Oxford Road and the north side of Dyott Road

This character area contains a greater mix of house types, generally slightly smaller than in St Agnes Road but with large gardens and mostly detached.

Wake Green Road is a major traffic artery and bus route. It is comparatively narrow for these functions and is often congested, especially in morning and evening rush hours. The mature trees and shrubberies of the adjoining gardens and grounds help to ameliorate the traffic fumes and noise.

The eleven houses and the former 'Gracie Hall/The Dingle' on Wake Green Road between St Agnes Road and Cotton Lane might easily have been assigned to character area 1 in that they are large detached houses on substantial plots, but the plots are smaller than most in area 1 and the houses were built later (1907-11) all but three were designed by W. De Lacy Aherne. The exceptions are Nos.48 and 50 (on the corner of Billesley Lane) which are by George Pepper. The former lacks the characteristic Horton sandstone details of most of his houses. No.40, on the corner of Cotton Lane, was designed by Owen Parsons. Nos.40 and 50 are both Grade 2 listed (see Appendix A for details of these houses).

Cotton Lane was developed in several phases although much of the road was built in the Edwardian Period. The north-western side (odd numbers) contains very large, high-roomed, Arts and Crafts houses, nine of which were designed by W De Lacy Aherne. On the south-eastern side, Nos.76-86 are smaller detached houses, including three by George Pepper.

The remainder of this side of the road (Nos.60-72) was developed in the 1920s with detached houses in the Arts and Crafts style. There are good examples of leadwork, brick patterning and timber-framing in these houses. The former grounds of Gracie Hall were developed in 2002-3 as Manor Park Close, a cul-de-sac of three-storey modern Arts and Crafts style houses and apartments with a communal garden and play area at the centre.

Billesley Lane has, over the last thirty years, become a major traffic artery between Kings Heath and Wake Green Road. There have been a number of serious accidents in the road and traffic calming in its central section (outside the Conservation Area) has failed to slow the speed of cars. It is an attractive road, curving gently (befitting its antiquity) and with broad grass verges and very fine mature lime trees planted in c.1928.

It is the most varied road in the Conservation Area in terms of the architecture of its houses, since plots were developed over a very long time period. Many were derived from the initial very large gardens of properties on Cotton Lane and St Agnes Road.

Much of the east side of Billesley Lane from Wake Green Road southwards was, until recently, undeveloped since it was the car park for the Lucas Training Centre. Subsequently, five large detached houses have been constructed here in modern Arts and Crafts related styles. Nos.32-36 are accessed from a cul-de-sac so as to preserve the conifers along the street boundary.

Nos.40-42 date from the mid-1920s and are fine examples of houses of this period. No.42, in particular retains its original front door and diamond pane glazing and has a front garden whose layout and planting dates from the time of its construction. Further southwards there is a mixture of 1920s, 1960s and recently built houses. No.52 is an unusual 1960s' stone-built bungalow with a prominent central door. A majority of the houses in this part of Billesley Lane now have uPVC double-glazed windows, new porches and doors, and brickpaved drives, often extending to 100 per cent of the front gardens.

On the western side of the road, between Oxford Road and the entrance to Moseley Tennis Club (which occupies back land in the triangle of Billesley Lane, Oxford Road and Cotton Lane) there are four detached Arts and Crafts houses built in 1905 to designs by Daniell & Berrill.

The western side of Billesley Lane then has a group of large, mostly double-fronted detached houses on very large plots, which were built in the 1920s' building boom. They are in speculative builders' Arts and Crafts style, attractively varied with good features including some fine Art Deco glass in doors and windows. The northernmost houses on the west side of the road are large modern replacements.

The triangular street block formed by the eastern part of Oxford Road, Dyott Road and the southern part of Billesley Lane has mainly detached houses, but on slightly smaller plots than the rest of the character area. Oxford Road, between Billesley Lane and Colmore Crescent, consists of detached, two-storey with attics, Arts and Crafts houses of varied design. The houses have gardens which are broader but shorter than the houses in the central section of Oxford Road. No.128a-d is a decidedly odd-looking brick house built for car manufacturer Frederick Lanchester (green plaque), partly to his own designs.

The plaster and timber-framed house on the corner of Billesley Lane (No.122), built in the 1920s, is particularly distinctive and its front garden has been redesigned to better reflect the character of the area. The four houses on the eastern side of Billesley Lane (Nos.68-76) were also built in the 1920s in Arts and Crafts style with timber gables and attractive detailing.



South east side of Cotton Road - 1920 Tudor style houses.

On the north side of Dyott Road within the Conservation Area there are six (two-storey plus attics) detached houses and three smaller houses of later date which were included when the Conservation Area was extended. Three of these houses (Nos.26-30) are attractive dwellings with timbered gables and compare with many of the houses in the eastern part of Oxford Road. No.30, which was built for George Lanchester in 1910 (green plaque) is a little different, with a large two-storey bay window on one corner. All these dwellings face houses on the south side of the road constructed in the 1950s in a debased Arts and Crafts style.

There are no roadside trees in Dyott Road but the mature trees in the gardens of the post-war houses on the south side, together with their sandstone walls are an important part of the streetscape. St Agnes Church Hall stands on the corner with Billesley Lane. This is a large building in the Arts and Crafts style, designed by Edwin F. Reynolds and opened in 1925-26. It is much used by the wider community.



### 3. The western part of Oxford Road, and Greenhill Road

Most of the houses in this character area are smaller, built on much narrower plots and often in semi-detached pairs. The central part of Oxford Road (from Billesley Lane to Cotton Lane) is characterised by mainly semi-detached houses, almost all built in the first decade of the twentieth century and

designed by only three or four of Birmingham's Arts and Crafts architects. The houses in Greenhill Road are similar, but built in the 1920s and designed by a single architect.

The semi-detached houses in Oxford Road have 'U' plans, on narrow plots without garages. They are two-storey but most have



Houses north side of Oxford Road - J Brewin Homes.



Houses in Greenhill Road - George Payton 1923-26.

attic bedrooms. The front gardens are small but most are attractively planted with small trees, shrubs and flowers. Most front gardens were originally bounded with sandstone block walls, though there are a few limestone block walls, especially on the north side of the road. Most of these houses were built in 1905-10. The work of two architects dominate: W. De Lacy Aherne at the Billesley Lane end and J Brewin Holmes at the western end. Red clay-tiled roofs; timber-framed gables; squared, five-sided bay windows, and Art Nouveau stained glass are characteristic features (at least 19 houses have surviving stained glass windows). The street scene is marred only by the occasional poorly designed 1960s' dormer window, by the loss of a small number of leaded lights as windows have been replaced, and by the loss of front-garden walls and front-garden planting as new drives have been constructed for car parking (especially true of the north side of the road).

Several houses at the western end were destroyed by WWII bombing and rebuilt in more modern styles in the 1950s. The semi-detached pairs on the western side of Billesley Lane (Nos.71-81) and the six pairs of houses on the north side of Greenhill Road, included in the Conservation Area when it was extended in 2009, were all built in the period 1923-26 as a single development to designs by local architect George Payton. Their builder subsequently occupied the corner house (No.81). They are attractive and well-maintained houses in a style that mixes Arts and Crafts with 'Bournville garden suburb' characteristics with similar plan form but slightly varied facades. The survey shows that they remain remarkably unaltered, apart from modern brick-paved drives and some window replacements which nonetheless maintain historic leaded light patterns. The solar panels shown in the adjacent image are an uncommon addition in the Conservation Area.

### 4. Grove Avenue and the western end of Oxford Road

The western end of Oxford Road, between Cotton Lane and School Road, has an eclectic mix of generally larger houses, most of which are detached. Six of them were designed by E and JA Harper. Those on the north side of Oxford Road are three-storey plus attics, in the earlier 'Queen Anne' style, all of which are in multiple occupation, but generally in good order. The houses west of Grove Avenue, on the north side of Oxford Road (Nos.49-53) consist of an interesting 1930s' (or early 1950s') house with 'Moderne' Art Deco windows; and a 1930s' Arts and Crafts style house on the corner of Grove Avenue, formerly used as the local headquarters of Toc H. On the south side of Oxford Road and west of Grove Avenue are large late-Victorian houses in multiple occupation.

This mix of late-Victorian houses (often double-fronted) and 'Queen Anne' style three-storey semi-detached pairs, together with one or two Arts and Crafts detached houses characterise Grove Avenue to both the north and south of Oxford Road. There are examples of work by the Harpers and by De Lacy Aherne, but the most prolific architect in this road was Stephen Holliday designing houses in the late 1890s for builder WE Gough.

Some of these larger houses have attractive brickwork, distinctive glazing bar patterns in the windows and Jacobean/Dutch style gables.

There are also a number of modern replacement post WWII houses. Rear gardens are substantial in Grove Avenue but on the southeast side almost all gardens have been divided transversely to provide plots for small modern houses fronting Cotton Lane (which are outside the Conservation Area).



Grove Avenue - Dutch style brick gables.



Grove Avenue - Arts and Crafts houses.



# Pressures on the Conservation Area

The St Agnes Moseley Conservation Area is not subject to the commercial pressures of its neighbouring Moseley Conservation Area since there are no shops or businesses in the designated area.

However, as property prices have risen over the past forty years and people's expectations of housing in the middle-class suburbs of the city have risen, there is constant pressure for houses to be upgraded and extended, sometimes to the detriment of their architectural character.

The extensive gardens of many of the houses in the Conservation Area also provide a temptation for developers and owners to divide the plot and build new houses, a process characterised

as 'densification', which often leads to the loss of trees and other vegetation.

There has been some loss of characteristic buildings within the Conservation Area, but some of these losses occurred before its designation. They are balanced by the well-designed properties of Manor Park Close (2002-03), which replaced 1960s' student housing, and the new houses constructed on the former car park of the Lucas Training Centre in Billesley Lane.

Large corner plots remain susceptible to demolition and replacement with denser development. However, since designation, such development has largely been prevented. One example is the derelict wilderness to the rear of No.129 Oxford Road. New houses have been permitted to the rear of No.50 Cotton Lane and in the former garage court to the rear of No.65 Oxford Road.

Large houses are attractive to institutional users and there are five properties in this category in the Conservation Area. Care homes occupy the Grade II Listed 'Ashley Lodge' in Colmore Crescent and 'Mapledene' in St Agnes Road. A number of houses formerly in institutional use have been successfully converted back to private use, notably the former Lucas Engineering training establishment which occupied Nos.5, 7 and 9 St Agnes Road.

No.8 St Agnes Road (Harris House) was owned by Barnardo's. Much of the 'Jacobean' decorative detail of the façade was removed and a modern entrance inserted. It has recently been partly restored and converted to apartments.

A small number of houses in Oxford Road are in multiple-occupation. There were more such properties before Designation, but changes in the local economy have seen most converted back to single occupancy. Some of the few houses in multiple-occupation are in poor repair. Two of the large

houses on Wake Green Road have been unoccupied for some years, including the Grade II Listed No.50, though both are currently being slowly restored.

The land in the centre of the street block framed by Billesley Lane, Oxford Road and Cotton Lane occupied by Billesley Tennis Club is susceptible to development pressure, particularly given the 'ransom strip' attached to the property bounding the entrance drive to the tennis club.

Trees and garden shrubberies form an important part of the character of the Conservation Area and there are many large trees at least 100 years old. There have been losses of such trees, especially from back gardens, due to both natural forces (the Birmingham tornado of 1st August 2005 passed across the western part of the Conservation Area) and removal. Gardens in the Conservation Area make an important contribution to biodiversity.

The alteration of houses by owners can lead to loss of the essential decorative details that make Arts and Crafts houses so special. The intervention of many modern 'improvements' to the fabric of such houses can harm the architectural integrity of the building. Most notable is the insertion of uPVC double-glazing, early examples of which often altered the characteristic verticality of the main window frames and introduced horizontality instead.

Later replacements have been of higher quality but most products are unable to truly replicate the pattern of glazing bars or the leaded lights that are so important a part of the character of the area. Window replacement also leads to the loss of stained glass panels and wrought iron fixtures and fittings.

A full survey of house facades was undertaken in August 2017 and shows that window replacement is a particular feature of Billesley Lane houses. However, it also shows that a very high proportion of houses in other streets retain timber windows. Replacement front doors seem to be less of a problem in the Conservation Area, except on Wake Green Road.

There are a few inappropriate loft conversions but most houses were built with habitable attics in the loft space and improvement rather than new build has been more usual. Increasing the size of the street frontage attic windows is not appropriate.

Some houses have had rear extensions and the addition of conservatories, but few are visible from the road and therefore have minimal impact on the character and appearance of the conservation area. A recent variant of the densification process is the building of living accommodation in separate buildings in the back garden. Again these are mostly invisible from the road.



Derelict wilderness rear of 129 Oxford Road.



Manor Park Close.



The survey showed that there are comparatively few roof replacements in evidence, and only five or six are in inappropriate concrete tiles, but the loss of one of the Westmoreland slate roofs in Oxford Road was unfortunate to say the least.

A recent and accelerating trend consequent on the increase in car ownership, is the removal of some or all of the characteristic front garden walls to provide off-street car parking, this is particularly noticable in Oxford Road where the majority of the houses lack garages.

This is accompanied by the replacement of all, or part, of the front garden vegetation with blockpaved driveways. The

property survey shows that this is a particular feature of Billesley Lane properties. Excessively high party boundary fences, or using inappropriate materials are also sometimes in evidence.

Traffic and its speed have become an increasing recent issue and the noise, visual intrusion and air pollution caused by increased traffic volumes considerably detracts from the quiet, suburban character of the Conservation Area; Billesley Lane, Oxford Road and Dyott Road are most affected. In addition, the traffic signs which are a necessary corollary of mitigation efforts to reduce speed and improve safety have created an increased degree of street clutter in the conservation area.



The east-west section of St Agnes Road. All the mature large trees in this view are in private gardens.







St Agnes Moseley Conservation Area

PART 2  
MANAGEMENT PLAN

Policy guidance

This guidance has been prepared in accordance with the National Planning Policy Framework (2019) and Planning Practice Guidance: conserving and enhancing the historic environment (Revised 2021).

It follows the advice set out in Conservation Area Designation, Appraisal and Management: Historic England Advice Note 1 (Second Edition 2019).

These policies should also be read in conjunction with the Birmingham Development Plan (2017) especially 'Policy TP12 Historic Environment'; the Moseley SPD (2014), the Mature Suburbs Guidelines SPD (2008) and the Moseley and Sparkhill Area of Restraint (1992) (see Appendix B). In forming their proposals applicants must have regard to the information contained in these documents.

**Additions and alterations**

There will be a presumption against additions and alterations to buildings which adversely affect their character and appearance, particularly their front elevations, or that of the Conservation Area. Proposals should ensure that additions or alterations to existing buildings have a positive effect on their character and that of the Conservation Area. The Council will ensure that all additions and alterations are sympathetic to the existing building in scale, proportion, materials and detailing.

The removal or masking of historic architectural details and/ or architectural elements will not be permitted. Where appropriate the Council will expect hidden, damaged or missing architectural details and/or elements to be accurately reinstated. Where significant alterations and/ or additions are proposed the Council will require designs to be submitted in detail.

It should include an analysis of the contribution made by the existing building to the character of the immediate streetscape and the wider Conservation Area and of the preservation or enhancement of that character by the proposed additions and/or alterations.

**Planning permission**

There will be a presumption in favour of retaining buildings which make a positive contribution to the character or appearance of the Conservation Area. This will include buildings of contextual or group value.

Where the demolition of a building which makes little or no contribution to the character of the Conservation Area is proposed, the Council will expect the developer to justify demolition in terms of the character of the Conservation Area and submit detailed plans for redevelopment. These should preserve or enhance the character of the Conservation Area. In the absence of satisfactory proposals consent for demolition will not be granted.



122 Oxford Road.

**Recording**

Where consent is granted for significant demolition the Council will expect an accurate archive record to be made prior to the commencement of any works. This will include photographs and/ or where appropriate, measured survey drawings and will be provided at the expense of the applicant. The outcome of this work will be provided to the Council and will form part of the public record.

**Change of use**

The Council will not permit changes of use to buildings where the new use would adversely affect their character and appearance or that of the Conservation Area. Applications in respect of residential care and nursing homes (use class C1 and C2) and non-family dwelling houses are subject to the policies laid out in the Moseley and Sparkhill Area of Restraint SPD.

Change of use can, however, lead to the enhancement of the character and appearance of the Conservation Area. An example is the return to residential use of the Lucas Engineering Training Centre which occupied Nos.5-9 St Agnes Road. The superb restoration of both the house and gardens of 'Hilver' (No.5) has greatly improved that part of St Agnes Road.

**Maintenance of historic plot boundaries**

The historic pattern of plot boundaries should be respected. The Council will resist the removal of boundaries and the amalgamation or sub-division of plots.

**Boundary treatments**

There will be a presumption in favour of retaining traditional boundary treatments such as sandstone or limestone walls, iron railings and iron or wooden gates. The Council will always encourage appropriate repair and reinstatement of historic boundary treatments however where no historic precedent or evidence exists for gates and railings modern versions will be resisted. The Moseley Society has published an advice leaflet on front garden boundaries (see Appendix B).

**The design of new development**

The Council will expect all new development to achieve a satisfactory relationship with its surroundings, demonstrating a regard for the character of the immediate and/or surrounding townscape and the wider Conservation Area. Permission

for new development will only be granted where it preserves and enhances the character of the Conservation Area as a whole. Existing buildings which are unsympathetic to the character of the Conservation Area will not be regarded as valid precedents for further uncharacteristic development.

The Council will require the Design and Access Statement for all significant new development to be submitted in detail. It should include an analysis of the contribution which will be made by the proposed new building to the character of the immediate and or surrounding townscape and the wider Conservation Area as defined in the Conservation Area appraisal.

The Mature Suburbs Guidelines SPD provides detailed guidance on 'design criteria' (section 4.12) and 'determining character' (section 4.5).



32 Billesley Lane.



**Development in the Conservation Area setting**

New development in the setting of the Conservation Area should, in height, scale and massing, respect and preserve characteristic views within, from and into the Area. The Council will not permit new buildings or additions to existing buildings beyond the Conservation Area boundary to intrude on, or block, views or sightlines.

**Key design principles**

The principles below should be applied as appropriate to all new development, including extensions, additions and other works to:

- New buildings should follow the building line characteristic of the locality or character area. Dominant architectural elements or features which project beyond the street frontage line will not be permitted.

- New buildings should not be significantly higher or lower than their neighbours and should reflect the building heights characteristic of the locality or character area. This will normally limit new frontage buildings to a maximum of three storeys.
- The plan form and architectural treatment of new buildings should complement the historic and architectural character of the Conservation Area. In particular, principal elevations must always front the principal street. Buildings behind the principal street frontage should be subordinate in height, scale, massing and elevational detail.
- New buildings should respond appropriately to actual ground level.



Semi-detached houses designed by W. de Lacy Aherne.

- The roof forms and rooflines of new buildings must complement the roof forms and rooflines of the surrounding and/or adjoining buildings. Roof-lights should be kept to a minimum, be of a conservation specification and be located on the rear slope of the roof.
- New buildings should respect the elevational hierarchy found in traditional buildings, in particular the proportion of solid to void. Windows should be set within reveals of sufficient depth to add definition and interest to the façade. Main entrances should be set in the principal elevation.
- Local identity should be reinforced through the use of natural materials traditionally employed in the area. Every care should be taken to match materials in colour, texture and weight. All building materials should be of high quality. The use of man-made materials such as uPVC will be resisted.
- Architectural detail of high quality and which contributes to scale, proportion and legibility will be encouraged. Indiscriminate, fussy and arbitrary use of applied features or detail will be resisted.
- New buildings must preserve views and vistas characteristic of the Conservation Area and respect the setting of key historic buildings.
- New buildings should be accessible to all users, including people with disabilities. Where specialised access is required it must be treated as integral to the design.
- Proposals for improvements in energy efficiency and for sustainable methods of energy supply will be supported where they do not detract from the historic and architectural character of the Conservation Area. Solar panels should normally be located on the rear slope of the roof.





# Enhancement schemes

There has already been considerable enhancement of the Conservation Area thanks to the efforts of the St Agnes Residents' Association and the initiative of new residents in all of the streets within its boundary.

### Groundscape

The existing public groundscape within the Conservation Area provides an appropriate neutral setting for its buildings and structures. Street surfaces are generally in good repair. The pavements are uniformly tarmac throughout the Conservation Area.

Where historic materials such as granite kerbstones and granite setts survive great care should be taken to ensure that these are retained and accurately repaired. St Agnes Road has very distinctive curbs, gutters (smooth concrete slabs with white stone edgings) and dropped entrance curbs (white limestone blocks) which have been partially hidden by inappropriate road maintenance. Efforts should be made to restore this where possible. Recent re-surfacing has improved the visibility of some of the concrete gutters by removing poorly laid asphalt.

If new paving schemes are proposed the design and materials should relate well to the surrounding buildings.

### Street furniture

New street furniture should be carefully designed or selected to reflect the suburban character of the Conservation Area. Care should be taken to avoid spurious 'heritage'. Any additions must be justified and restricted to essential items. Damaged or lost cast-iron street name-plates should be replaced by modern replicas since they are an important part of the character of the Conservation Area.

### Clutter

A co-ordinated effort should be made to avoid street clutter through good design and careful siting. Where possible, signs and equipment should be fixed to lighting columns, buildings, or other existing structures. Larger items such as cable TV/phone control boxes should be sited at the back of the footway. The design and siting of essential new equipment must be co-ordinated by the Council.

### Street trees

Street trees are characteristic only of the northern section of St Agnes Road (London planes) with a short continuation round

Colmore Crescent into Oxford Road, and of Billesley Lane (Limes). The latter are set in grass verges along the kerbside. Both contribute substantially to the character and biodiversity of the Conservation Area. The holly hedge and sandstone block wall boundaries of Cleveland Court, though not in the Conservation Area, add considerably to the character of the northern part of St Agnes Road, as do the trees and sandstone block wall in front of the modern houses on the south side of the eastern end of St Agnes Road.

### Views

Key views and street views should be protected and new features within the public realm carefully sited to avoid intrusion on the setting of buildings. The most important views are those along the length of St Agnes Road to the east front of St Agnes Church, along the eastern part of Oxford Road towards the tower of St Agnes, and across the eastern end of Dyott Road taking in the whole of the south elevation of the church. The gentle curve of Billesley Lane, with its mature lime trees is another important view.



Replica traditional street sign.



Street clutter Billesley Lane/Dyott Road.

# Ongoing management

### Street and Traffic Management

#### Alterations to streets and roads

Any alterations to the streets and roads within the Conservation Area, including changes in the width of footways or carriageways should respect the historic street pattern which has remained unchanged since the area was first built up. 20mph speed limits are now in force throughout the Conservation Area except for Wake Green Road. Speed bumps are in place in Oxford Road and Billesley Lane and help to slow traffic, as do the mini-roundabouts at crossroads in Oxford Road.

The LTN measures that were implemented in 2020 currently remain in place, however proposals for a modal filter at the junction of Oxford Road and Billesley Lane, in order to reduce through traffic on Oxford Road, and for the introduction of a gyratory at Dyott/St Agnes/Colmore Crescent to make that route less attractive to through traffic, form part of a phased approach by the transport planning team at the city council to address increased traffic volumes through the area.

The management of street parking related to Moseley Church of England School in Oxford Road (though outside the Conservation Area) requires ongoing consideration in conjunction with the staff and governors of the school.

### Trees and Open Spaces

#### Trees

Existing trees within the Conservation Area should be retained. When felling or cutting back any tree within the Conservation Area it is necessary to give the Council six weeks written notice. In giving notice it is necessary to specify precisely what works need to be carried out and why.

#### Street trees

The plane trees in St Agnes Road are now substantial specimens. In the past their branches have been periodically pollarded and this is acceptable management in the future. The lime trees in Billesley Lane date from 1928 and are in excellent health.

### Enforcement and Remediation Strategy

#### Enforcement

The Council has a duty to consider taking enforcement action where they believe there to have been a breach of planning control. Given the particular threat to the special character of the Conservation Area that unauthorised development entails, the City Council will carry out an annual review of the Conservation Area and will take appropriate action when it is in the public interest to do so.

### Repair and maintenance

The Council will use its statutory powers to secure the preservation of threatened buildings in the Conservation Area. In the case of statutorily listed buildings these powers include Urgent Works and Repairs Notices and, as a last resort, compulsory acquisition. The Council also has the power to secure the preservation of unlisted buildings where it is important for maintaining the character or appearance of the Conservation Area.

The Council will provide guidance on the repair and maintenance of traditional buildings in the Conservation Area.

### Article 4(2) Direction

At present all properties within the Conservation Area are subject to an Article 4(2) direction. This controls small-scale change through the removal of some permitted development rights.

For example, any enlargement or alteration where the property fronts a highway requires planning permission within this area. Should any extension to the conservation area be approved the Article 4(2) Direction might need to be extended to include properties in the new extensions in order to consistently manage the Conservation Area. A guide for owners and occupiers is contained in Appendix C.



# Opportunities for positive future change

## Institutional uses

Institutional use of houses built for residential purposes very frequently leads to the removal of original architectural details, to improve ventilation for example, and the addition of inappropriate modern features, especially connected to front door disability access. Institutions also usually require additional parking and delivery areas in former front gardens leading to the loss of vegetation. A number of former institutions have been successfully returned to residential use in the Conservation Area including Harris House, recently converted to apartments. Given the overwhelmingly residential character of the Conservation Area, conversion of former institutional buildings is to be encouraged.

## Multiple occupation

Houses in multiple occupation are often in poor decorative repair externally. Porches have often been converted to open access vestibules with post boxes and apartment door bells, and front gardens usually lack vegetation in order to provide parking space for residents.

Similar opportunities for enhancement therefore come when houses formerly in multioccupation are returned to single occupation. This process has been a particular feature of houses in Oxford Road and there are now comparatively few houses not back in single occupation. Applications for conversion of dwellings to multioccupation should be resisted and conversion back to single ownership encouraged.

## Replacement houses

The replacement of the out of-character 1960s' houses permitted in Billesley Lane before designation would enhance that street considerably. This process is already well underway. However, replacement houses within the Conservation Area are not always of good design, use inappropriate materials and sometimes lack any links with the character of the other houses in the street. Developers and architects should be encouraged positively to provide schemes that are contextualised to their particular location.

## St Agnes Hall

St Agnes Church Hall marks the southern boundary of the Conservation Area. It is heavily used by the community. It dates from 1925-26 and was designed by well-known Birmingham Arts & Crafts architect, Edwin Reynolds. Though there has been some interior renovation in recent years the outside is in poor condition. Grant aid would almost certainly be necessary to replace the roof and repair and paint the windows.

## Unoccupied properties

There are several houses in the conservation area which have been unoccupied for some years. Recently, some of these properties have been subject to the start of restoration and upgrading but the work is proceeding at slow pace.





# Appendix A

## Statutory Listed Buildings

### St Agnes Church Grade II

The church was built in 1883-4 to the designs of William Davis after an architectural competition. Davis was a Birmingham architect with offices in Colmore Row. It was built in three phases: the east end, transepts and two bays of the nave first; the rest of the nave and base of the tower in 1892-93; and the upper stages of the tower in 1931-32 to the designs of C.E. Bateman.

The church is Gothic in style with Decorated tracery in the larger windows. The low aisles have pairs of lancet windows. The capitals and decorative detail are also Decorated in style. The church is built of rock-faced Hampstead sandstone with Bath limestone detailing; the upper part of the tower is in ashlar limestone. It is surrounded by an oval lawned churchyard enclosed by a rusticated sandstone wall and holly hedge

(both part of the Listing). There is a circle of mature Sycamore trees and other trees in the churchyard.

There are modern oak gates provided in 2000 to north and south, and a lych gate built in 1938 to the west (also part of the Listing). The west door, facing Oxford Road, is the principal entrance. The church is illuminated at night with modern architectural lighting installed in 2001.

There is a good Arts and Crafts stained-glass window by Birmingham artist Henry Payne at the west end of the north aisle. The small aisle windows have glass by the John Hardman studio and by Claude Price, all provided after World War II in 1949-55. The east window is by Ballantyne & Gardner, an Edinburgh firm, and was provided to celebrate Queen Victoria's diamond jubilee by the people of Moseley.

The William Hill organ has fine cases and stands on a modern west gallery (by APEC). It was moved from the redundant St Mark's, Leicester in the 1990s. The superb interior oak furnishings (pulpit, choir stalls, lectern, baptistery screens, west door screens, north door, front and rear pews) are in late Perpendicular Gothic style, designed by James Swan, and hand-carved by Pancheri & Hack of the Bromsgrove Guild in 1937-39 and 1950-56.

Interior alterations are subject to the Ecclesiastical Exemption and are managed by the Birmingham Diocesan Advisory Committee.



St Agnes Church.

### Tudor (now Ashley) Lodge (1 Colmore Crescent) Grade II

This house is to designs by Owen P. Parsons and was built in 1916-20. It has been in institutional use since the early 1950s when an additional wing was added and is now used as a nursing home. It has high-quality building materials including stone slate hanging on the main front. The garden front has a verandah and large polygonal oriel window. Internally the house retains many original features including fine plaster ceilings.

### 130 Oxford Road (The Gateway; originally called Maxstoke) Grade II

This small detached house of 1907 is also by Owen P. Parsons in red brick and stucco, with tiled roofs and leaded light windows. Very heavy timbers are characteristic of Parsons' designs. Its Arts and Crafts features are beautifully preserved, as is the original front garden layout of crazy paving, clipped yews and a post and lintel timber gateway.



Tudor (now Ashley) Lodge.



130 Oxford Road.



**110 and 112 Oxford Road  
Grade II**

This unusual pair of two-storey semi-detached houses of 1907 are by W De Lacy Aherne. They are identical in plan but have slightly different exteriors which are of white-painted brick. The Westmoreland slate roofs are a distinctive feature. The houses are separated by entrance drives to the linking garage block which may not have been built until a few years later. The builders were Messrs Unwin and Fisher who occupied the houses themselves.

The inner gates, wrought iron overthrows with their house number plaques, and the painted brick front garden walls with stone copings and ball finials are separately Listed Grade II as they are an integral part of the design. There were originally outer front gates (the hanging pins survive) and the walls once had wrought-iron railings which were removed during the Second World War.



110-112 Oxford Road.

**40 Wake Green Road  
(Kingsthorpe) Grade II**

This large detached house on the corner of Cotton Lane is to the designs of Owen P. Parsons and was built originally for FS Banks, a Birmingham jeweller, in 1911. For much of the mid-20th century the house was occupied by the England family, who were shoe manufacturers. They lived in some style with butler, chauffeur and servants. Gables and the leaded-light casement windows are prominent in the façade and also on the side elevation to Cotton Lane. There is a very large ground floor reception room at the front, and an interior first-floor balcony which is supported on Tuscan columns. The garage has a timber-hung gable with a room over and a lead-covered ventilation dome. Brick and pebble patterns decorate the house façade.



40 Wake Green Road.

**50 Wake Green Road  
(Broxtowe) Grade II**

A smaller detached house designed by George Edward Pepper stands on the corner of Billesley Lane. It was built by HJ Pitts for AN Gosling, a butcher, in 1907. Pepper's houses are very distinctive with extensive use of Horton stone dressing to the brick façade and with leaded-light windows. There is a polygonal bay window on the ground floor and a columned porch. The interior woodwork is apparently unaltered. The 'motor house' is an integral feature and also has a cupola for ventilation of exhaust fumes. The house has recently been restored after a period of semi-dereliction.



50 Wake Green Road.

**9 St Agnes Road (Whitecroft)  
Grade II**

This is a large detached house of two storeys and attics and was designed by W De Lacy Aherne in 1906. The northern half has roughcast plaster walls, the southern half is timber-framed; there is chequer work in tiles on the façade and a steeply-pitched Westmoreland slate roof with deep overhanging eaves. Shallow battered buttresses to the porch and corner of the façade are distinctive features. It was in institutional use for the last thirty years of the 20th century but is now a private dwelling once more.



9 St Agnes Road.



**15 St Agnes Road (West Hooe)  
Grade II**

This is another large detached house of two storeys and attics which was designed by Antony Rowse for his brother Thomas in 1904. The southern end is a three-storey gable and there is a large stone mullioned window (lighting the staircase) between it and the two-storey northern half of the house. The interior is apparently unaltered and there is an original internal ventilation system.

**25 (The Moorings) and 27  
(The Homestead) St Agnes  
Road Grade II**

This symmetrical pair of semi-detached Arts and Crafts houses was designed by W. Alexander Harvey (the architect of many of the early houses in Bournville village) in 1905. There are distinctive oriel windows on the first floor with pargetted decoration. No.25 was badly damaged by a World War II bomb but was repaired and rebuilt by Harvey in 1945-47. The original York stone crazy paving driveways and open-plan space between the houses remain in situ, as do the splendid Irish yews which line both front drives and which were planted when the houses were built.



15 St Agnes Road.



25 and 27 St Agnes Road.

# Appendix B

## Wider planning policy framework

**National legislation and guidance**

- Planning (Listed buildings and Conservation Areas) Act 1990.
- Town and Country Planning act 1990 (part viii).
- Town and Country Planning (Trees) Regulations 1999.
- Planning and Compensation Act 1991 (Section 23).
- Ancient Monuments and Archaeological Areas Act 1979.
- National Heritage Act 1983.
- Birmingham and Black Country Biodiversity Action Plan.

**National Planning Policy Framework (2021)**

The National Planning Policy Framework, revised on 20th July 2021, sets out national policy on planning around a variety of issues and supersedes the majority of Planning Policy Guidance Notes and Planning Policy Statements. Of particular relevance to the CAAMP is Section 16 ‘Conserving and Enhancing the Historic Environment’.

**Planning practice guidance**

[Conserving and enhancing the historic environment \(2014\).](#)  
The guidance provides advice on enhancing and conserving the historic environment and follows the advice set out in Conservation Area Designation, Appraisal and Management: Historic England Advice Note 1 (Second Edition 2019).

**City Council policy context**

The CAAMP has been prepared in accordance with and as a supplement to the following planning policies:

[The Birmingham Development Plan January 2017](#)

The Plan is the city’s statutory planning framework guiding decisions on development and regeneration activity over the period until 2031. The Plan recognises Birmingham’s historic development and its rich and varied environment which contributes to the unique essence of the city. Policies in the Plan seek to value, protect and enhance the historic environment; see especially ‘Policy TP12 Historic Environment’.

[Moseley Supplementary Planning Document \(SPD\) 2014](#)

The Moseley SPD provides planning and development guidance to maximise the potential of Moseley as a local suburban ‘village’ centre. In particular it aims to build upon the heritage of the village centre (Moseley Village Conservation Area) and its residential heritage (St Agnes, Moseley Conservation Area). The CAAMP has been prepared in accordance with and as a supplement to the policies that it sets out.

[Mature Suburbs Guidelines Supplementary Planning Guidance \(2008\)](#)

This sets out the City Council’s strategy for dealing with the particular development pressures on suburban housing areas of the late Victorian, Edwardian and interwar suburbs for intensification and ‘building in the back gardens’.

[Regeneration through Conservation Supplementary Planning Guidance \(1999\)](#)

Adopted in March 1999, ‘Regeneration through Conservation’ sets out the City Council’s strategy for conservation of the built environment with a particular focus on the opportunities for regeneration that conservation can create. Of particular relevance is the stated aim of producing character appraisals of Conservation Areas.

[The Moseley and Sparkhill Area of Restraint Supplementary Planning Guidance \(1992\)](#)

This provided restraints on the further development of retirement and nursing homes in the designated area. Almost the whole of the Conservation Area is within the Area of Restraint.

[Moseley Society: Great Walls of Moseley \(2001\)](#)

Legal and design advice on the treatment of front garden boundaries in the Conservation Area was provided by The Moseley Society in September 2001.



# Appendix C

## Article 4(2) Direction

An Article 4(2) Direction applies to residential properties only and removes Permitted Development rights from front and significant elevations. This means that any minor alteration which would normally not require planning permission will need consent.

Alterations such as installation of replacement doors, windows and porches, the creation of hard standings and the removal of original boundary treatment, perhaps insignificant as individual alterations, have taken place in St Agnes Conservation Area under Permitted Development before the application of the Article 4(2) Direction on 31st July 2009 to the detriment of the character of the Conservation Area.

The Article 4(2) Direction means that minor alterations will require planning permission if they front a highway or open space.

These include:

- Any enlargement, improvement or alteration to a dwelling house.
- Any alteration to the roof of a dwelling house.
- Construction of an external porch.
- Creation or replacement or enlargement of a hard standing for off-street parking.
- The installation, alteration or replacement of a chimney of a dwelling house.
- Installation or alteration of a satellite antenna on any part of the front of the dwelling house.
- Erection, demolition or alteration of a gate, fence or other means of enclosure at the front of a dwelling house.
- Exterior painting of the front of a dwelling house.

# Appendix D

## Equality analysis

The CAAMP has been prepared with due consideration to the City Council's responsibilities under the Public Sector Equality Duty.

As such an equality analysis has been undertaken; this indicates on the basis of the currently available information that the proposals outlined in this document will not have an adverse impact upon persons within the protected categories.

This equality analysis will continue to be updated as part of the CAAMP monitoring process.

With regards to the three individual elements of the Public Sector Equality Duty for the City Council, the main impact of the CAAMP is to advance equality of opportunity between persons who share a relevant protected characteristic and persons who do not share it.

Specifically, the policies within this CAAMP seek to ensure that new developments are accessible to all users, including people with disabilities.







#### Contact

Planning and Development  
Inclusive Growth Directorate  
Birmingham City Council

**E-mail:**  
[planningandregenerationenquiries@birmingham.gov.uk](mailto:planningandregenerationenquiries@birmingham.gov.uk)

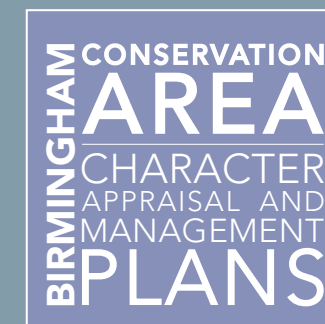
**Web:**  
[www.birmingham.gov.uk](http://www.birmingham.gov.uk)

**Post:**  
PO Box 28  
Birmingham  
B1 1TU

The City Council will communicate this document in a suitable way to all audiences. In addition to the online and printed documents, requests for the document in alternative formats will be considered on a case by case basis including large print, another language and typetalk.

Plans contained within this document are based upon Ordnance Survey material with the permission of Ordnance Survey on behalf of the Controller of Her Majesty's Stationery Office.

© Crown Copyright. Unauthorised reproduction infringes Crown Copyright and may lead to prosecution or civil proceedings.  
Birmingham City Council. Licence number 100021326, 2021.



**The St Agnes Moseley Conservation Area Character Appraisal and Management Plan produced by**  
Birmingham City Council, Planning and Development, Inclusive Growth Directorate.





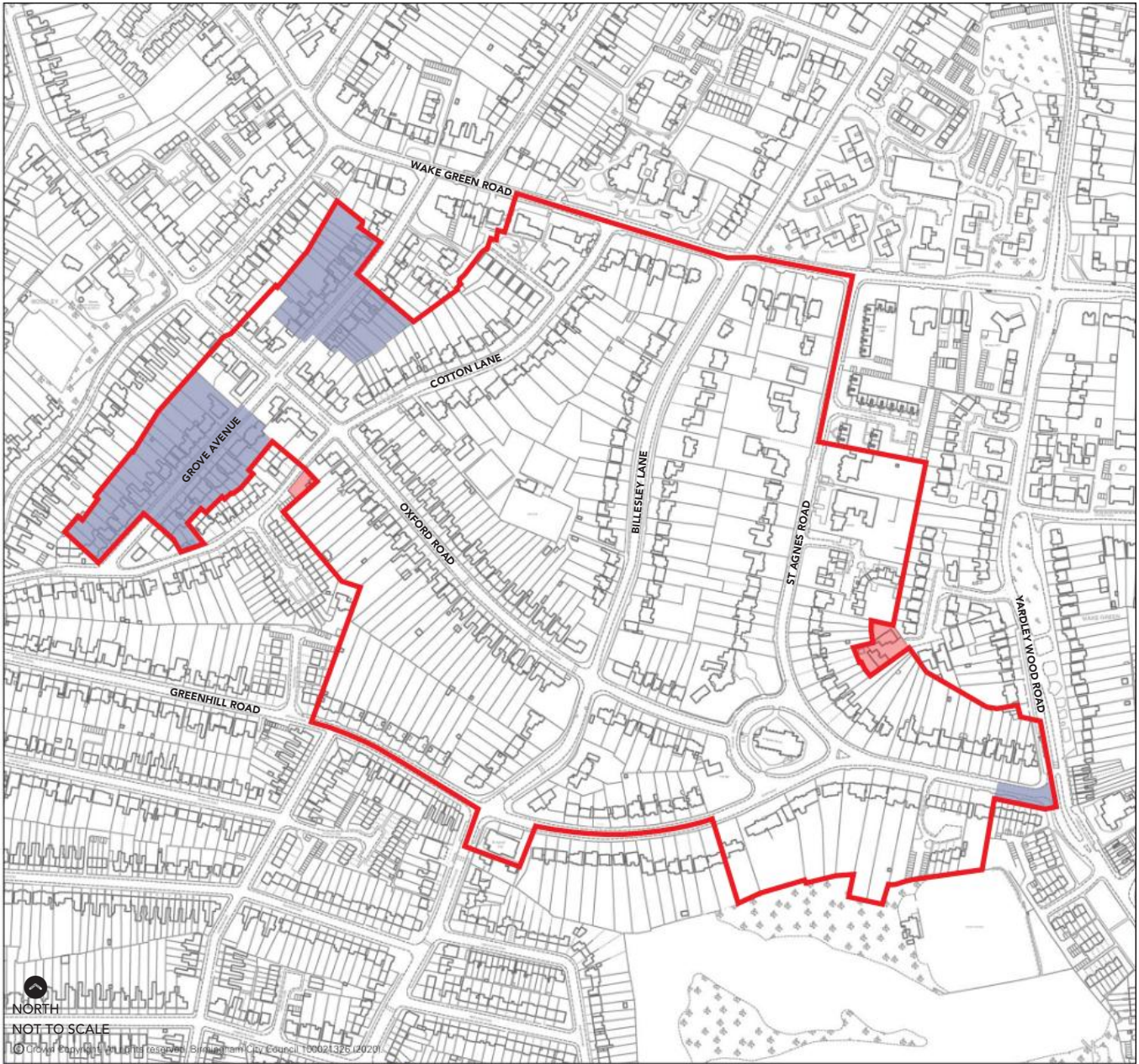
# St Agnes Moseley Conservation Area

Character Appraisal and Management Plan

May 2022







St Agnes Moseley Conservation Area boundary.

## Key

- Conservation Area boundary
- New additions to the conservation area following 2022 adoption
- Removals from the conservation area following 2022 adoption





**BIRMINGHAM CITY COUNCIL****TOWN AND COUNTRY PLANNING ACT 1990 (as amended)****TOWN AND COUNTRY PLANNING (GENERAL PERMITTED DEVELOPMENT)(ENGLAND) ORDER****2015 (as amended) ("the Order")****ST AGNES CONSERVATION AREA, BIRMINGHAM****Notice of confirmation of Direction under Article 4(2)****OWNER OCCUPIER**

**BIRMINGHAM CITY COUNCIL GIVES YOU NOTICE** as occupier/owner of the land

described in the First Schedule to this Notice ("the Land") that the Council have amended a Direction made under article 4(2) of the Order, which will come into force on (date t.b.c). The

Direction is to be confirmed on (date t.b.c).

The Direction relates to development of the type specified in the Second Schedule to this

Notice within the area described in the Third Schedule to this Notice.

The effect of the Direction is that permission granted by article 3 of the Order shall not apply

to development of the type specified in the Second Schedule to this Notice and that such development shall not be carried out on the Land unless planning permission is granted by

the Council on an application made to them.

A copy of the Direction and of the map defining the area of land covered by it may be seen

On the Council's website at: <https://www.birmingham.gov.uk/StAgnesConservationArea>.

**FIRST SCHEDULE**

See below address

## **SECOND SCHEDULE**

Schedule 2, Part 1, Class A of the Order:

**The enlargement, improvement or other alteration of a dwellinghouse where any part of the enlargement, improvement or alteration fronts a relevant location.**

Schedule 2, Part 1 Class C of the Order:

**Any alteration to a roof slope that fronts a relevant location.**

Schedule 2, Part 1, Class D of the Order:

**The erection or construction of a porch outside any external door of a dwellinghouse, where that external door fronts a relevant location.**

Schedule 2, Part 1, Class F of the Order:

**The provision, within the curtilage of a dwellinghouse of a hard surface for any purpose incidental to the enjoyment of the dwellinghouse as such: or the replacement in whole or in part of such a surface, where the hard surface would front a relevant location**

Schedule 2, Part 1, Class G of the Order:

**The installation, alteration or replacement of a chimney, on a dwellinghouse.**

Schedule 2, Part 1, Class H of the Order:

**The installation, alteration or replacement of an antenna on a part of a dwellinghouse or on a building within the curtilage of a dwellinghouse which in either case where the part of the dwellinghouse or other structure on which the antenna is to be installed,**



**altered or replaced fronts a relevant location.**

Schedule 2, Part 2, Class A of the Order:

**The erection or alteration of a gate, fence, wall or other means of enclosure within the curtilage of a dwellinghouse where that gate, fence, wall or other means of enclosure fronts a relevant location.**

Schedule 2, Part 2, Class C of the Order:

**The painting of the exterior of any part of a dwellinghouse or any building or enclosure within the curtilage of a dwellinghouse where the painted part of that dwellinghouse or building or enclosure fronts onto a relevant location.**

Schedule 2, Part 31, Class B Order:

**The demolition of a gate, fence, wall or other means of enclosure within the curtilage of a dwellinghouse where that gate, fence, wall or other means of enclosure fronts a relevant location.**

**A 'relevant location' means a highway, waterway or open space.**

### **THIRD SCHEDULE**

#### **Address of domestic properties within the conservation area.**

**Wake Green Road** 38a, 38B, 42, 44, 46, 48, 56, 58, 60, 62, 64

**St Agnes Road** 1, 3, 5, 7, 11, 13, 17, 18, 19, 20, 21, 22, 23, 24, 26, 36, 37, 38, 39, 40, 41,  
43, 44, 46, 47, 48, 50, 52, 54, 56, 58, 60, 62, 64, 66, 68

**Dyott Road** 14, 16, 18, 20, 22, 24, 26, 28, 30, 35, 39, 41

**Greenhill Road** 47- 69 (odd numbers only)

**Oxford Road** 49, 51, 56, 57, 58, 60, 61, 62, 63, 64, 66, 68, 69, 70, 71, 72, 73, 74, 75, 76, 77  
78, 79, 80, 81, 82, 83, 84, 85, 86, 87, 89, 90, 91, 92, 93, 94, 95, 96, 97, 98, 99, 100, 101,  
102, 103, 104, 105, 106, 107, 108, 109, 111, 113, 114, 115, 116, 117, 119, 121, 122, 123,  
125, 126, 126A, 127, 128, 128A, 128B, 128C, 128D, 129, 130, 133, 135, 137, 139, 141, 143

**Cotton Lane** 50, 51A, 51, 53, 55, 57, 58, 59, 60, 61, 62, 63, 64, 65, 67, 69, 70, 71, 72, 73,  
74, 75, 76, 77, 78, 80, 82, 84, 86, 91, 93

**Manor Park Close** 4, 6, 8, 10, 12

**Billesley Lane** 8, 12, 23, 25, 27, 29, 31, 32, 33, 34, 35, 36, 37, 38, 39, 40, 41, 42, 43, 44,  
45, 46, 47, 48, 50, 51, 52, 53, 54, 55, 56, 57, 58, 68, 69, 70, 71, 73, 74, 75, 76, 77, 79, 81

**Grove Avenue** 2, 4, 6, 8, 9, 10, 11, 12, 13, 14, 15, 16, 17, 18, 19, 20, 21, 22, 23, 24, 25, 28, 31, 33, 34,  
35, 36, 37, 38, 39, 40, 40a, 41, 42, 43, 44, 45, 46, 47, 48, 49, 50, 51, 52, 53, 54, 56, 58, 60

**Colmore Crescent** 5

Resident No.	Comment	Support CAAMP document	Support boundary Y/N	Support Article 4 Y/N	Officer response to comments
1	<p>Surprisingly, the documents do not refer to the Council's proposals in relation to the low traffic neighbourhood area. I would make the following observations.</p> <p>1 the Council has concluded that it is desirable to preserve and enhance the character and appearance of St Agnes Conservation Area.</p> <p>2 the Council is under a duty to formulate proposals to preserve and enhance the conservation area.</p> <p>3 the consultation documentation expressly acknowledges that even existing traffic levels in Oxford Road detract from the character and appearance of the conservation area.</p> <p>4 the measures introduced by the Council to promote an LTN, including the closure of School Road, have led to a material increase in traffic on Oxford Road which must detract from the character and appearance of the conservation area.</p> <p>5 it follows that the Council will be acting unlawfully if it implements an LTN which results in detriment to the character and appearance of the conservation area.</p> <p>I have made a number of other points to your colleagues dealing with the LTN and the proposed traffic regulation order , but I am copying this to Joe Green and to the Councillors to draw their attention to the conclusion already drawn by the Council that traffic levels are already having a detrimental effect upon the conservation area.</p> <p>It is obviously of paramount importance that the Council's City Design Manager and team engage with the LTN proposals to ensure that issues relating to the conservation area are properly considered and that the Council does not err in its public law duties.</p>	Objection to Wording of character of Oxford Road regarding traffic and LTN.	Y/ no objection	Y/no objection	Text on pages 21, 26 and 30 in relation to the character of Oxford Road amended in document to reflect comments.
2	<p>I live in Grove Avenue. On the Draft Consultation Paper Article 4 the following addresses are listed as included, but on the map they are cut off from the Cotton Lane end of Grove Avenue. I assume the map is correct and we are not included in the proposed conservation area.</p> <p>54 Grove Ave 56 Grove Ave 58 Grove Ave 60 Grove Ave</p>	Y/no objection	Y/ no objection	Y/ no objection	<p>The addresses in question are proposed to be included in the amended boundary. There was a placement error on the proposed boundary changes map but the proposed boundary changes map at Plan 1 of the document, as consulted on, is correct and the residents were informed of the proposed inclusions by letter.</p> <p>After further discussion the respondent has confirmed no objection to inclusion in the conservation and merely</p>



					required clarification on the proposed position.
3	I have looked at the proposed extension to the boundary for St. Agnes CA. Any extension is welcome, but in my opinion, this does not go anywhere near far enough from Cotton lane onwards, it should continue to include part of School Road where there are many fine as yet unspoiled period houses on the left side and for the boundary to run further down Oxford road to the church even	Y/ no objection	Y/ no objection	Y/no objection	To include further areas would require a further consultation period. Recommend these areas are looked at as part of the next review of the St. Agnes CA.
4	Whilst I would love to see the beautiful houses here conserved there is an elitist whiff about this. I live in Grove Avenue in a house converted into 3 flats by Birmingham city council. I bought my flat plus the freehold because I love living here but would never be able to afford a house here. The houses are enormous, my flat has 3 bedrooms and more floor space than my previous house. It means families who can't afford £650 k can live in a nice area. Surely it's the job of the planning department to ensure sympathetic construction or modification of the buildings and trees can have protection orders placed on them.	Y/ no objection	Y/ no objection	y/ no objection	
5	I live in Grove Avenue and was surprised to receive your recent letter proposing to include mine and neighbouring properties in the conservation area. Our house was built in 2003 as was 2b and 3,5,7 opposite are also modern. Having reviewed the proposed boundary changes map and the Society's map in their review online it appears that you are proposing to add modern properties at the Wake Green Road end of Grove Avenue while excluding those Victorian properties at the Cotton Lane end. This is contrary to the map and directions provided by the Society. Please could you confirm if an error has been made on the proposed boundary changes map?	Y/No objection	Query but overall no objection	Y/no objection	The proposed boundary changes will not include Nos. 2a or 2b or Nos. 3, 5 and 7 Grove Avenue. There was a placement error on the proposed boundary changes map. The proposed boundary changes map at Plan 1 of the document is correct.
6	I was the citizen who raised the issue of houses in Manor Park Close being affected by proposed changes during tonight's consultation.  I stand corrected in that I suggested that the boundary was being withdrawn to exclude houses on the Manor Park Close estate development, in fact the map on page 13 of the draft Character Appraisal and Management Plan and narrative on page 7 suggest the houses are considered for removal from Article 4 direction as being post World War II and presumably of less merit.  You will see from my contact details below that I am one of the residents affected by this specific proposal.	Y/no objection	Y/no objection	Y/no objection	The houses on Manor Park Estate remain in the conservation area and will not be considered further for removal from the Article 4 Direction

	<p>I am not the original owner of this 2002 house but my understand that the aesthetics and sizing of this and neighbouring houses were positively influenced by being in the conservation area, while other houses on the estate outside the boundary are less sympathetic to the local vernacular.</p> <p>Elsewhere in the draft (pages 21, 28 and 29) the Manor Park Close estate is mentioned as a positive addition to the conservation area, and indeed the Moseley Society mentions the Manor Park Close development favourably and pictures my own house in their literature.</p> <p>For the avoidance of doubt I am opposed to the removal of conservation area protection from the houses that currently enjoy it on Manor Park Close estate give the trouble taken to make them sympathetic to the local characteristics in the first place and the good regard they are now held in. Equally I am opposed to the exemption of post-World War II houses within the conservation area more generally, because they are distributed widely across the area and any removal of protection for these numerous properties would devalue the overall benefit of enforcing more rigorous standards on their immediate neighbours.</p>				
7	I wish to offer my unreserved support for the retention and extension of the St Agnes Conservation area here in Moseley. I value what this status provides for the area and appreciate the effort that has gone into sustaining this much values project	Y/ No objection	Y/ No objection	Y/ No objection	
8	I am writing in regard to the consultation on the St Agnes Conservation area. As a Moseley resident I believe this to be incredibly important to the heritage of the area and strongly support the continuation of it.	Y/ No objection	Y/ No objection	Y/ No objection	
9	I am a resident on St Agnes Road. I would support any measures to maintain the Conservation Area Status for this area. The work from STARA, the Moseley Society and BCC has been invaluable maintaining the period character of the properties in the Conservation Area and in my opinion it is essential that the status in continued.	Y/ No objection	Y/ No objection	Y/ No objection	
10	We live within the above conservation area. We fully support both the conservation area and the proposed St Agnes Character Appraisal and Management plan.	Y/ No objection	Y/ No objection	Y/ No objection	
11	Please accept this email in support of the St Agnes Conservation Area. Huge amounts of work have been undertaken over many years to protect and preserve the integrity and history of this part of Moseley. I would also like to emphasise my support for the proposed St Agnes Character Appraisal and Management Plan.	Y/ No objection	Y/ No objection	Y/ No objection	

12	<p>I believe you are having a review of the conservation status</p> <p>I moved to this area because of the beautiful houses and the way they are kept that way, with no alterations, extensions etc which would spoil the general look of the area. I have attended residents meetings and heard about some of the planning applications, which would alter the appearance of buildings and been horrified at the lack of respect some of these proposals have. The area is a real gem both locally and in Birmingham and the people who work so hard to keep it that way should have the back-up of the council, especially with the slack rules nationwide on planning. I</p> <p>In previous times, especially the 1980's several changes were allowed, for example 30 St Agnes road, which had a really ugly addition on its front, so a group was formed to make it a conservation area and this has enhanced the protection of the properties, so let's not take a retrograde step and slacken off the vigilance needed.</p>	Y/ No objection	Y/ No objection	Y/ No objection	
13	<p>I am writing following recent information that the St Agnes conservation area is currently part of a consultation process. This is extremely valuable to our area and as a local resident I am personally in support of retaining the St Agnes Conservation area. Please include this within your review.</p>	Y/ No objection	Y/ No objection	Y/ No objection	
14	<p>I understand you are reviewing the St Agnes Road, Moseley, conservation area. As a resident of the area I fully support maintaining it as a conservation area.</p> <p>The reasons for this are as follows: During "lockdown" residents and local walkers found the place to be an unspoilt "haven". This helped people relax and reduced their pandemic stress levels. The houses are of historic importance and being in a conservation area any changes to properties have to be reviewed by the council. This prevents "monstrous" developments which are not in keeping with the area and spoil our heritage. Adjacent roads do not enjoy conservation status and beautiful old houses are being destroyed. By looking after the area, and showing other people that we care, demonstrates the passion in some people to preserve what we have. Hopefully other areas in Birmingham will follow our example and start to look after their area eg not drop litter and be respectful to nature. Please do continue to keep the conservation area protected. Thank you.</p>	Y/ No objection	Y/ No objection	Y/ No objection	
15	<p>We are extremely supportive of the importance of STARA to the local residents and to the wider local community. The suburban environment covered by STARA has historic significance to Birmingham too thanks to the vision of the city 100 plus years ago and we need champions to ensure this legacy is maintained and the lessons learnt for local communities for future generations.</p>	Y/ No objection	Y/ No objection	Y/ No objection	
16	<p>Just a quick email to confirm my wholehearted support for retaining the St Agnes Conservation area in its current form. This is a unique and valuable heritage asset which shouldn't be compromised in any way</p>	Y/ No objection	Y/ No objection	Y/ No objection	



17	As a resident of the St Agnes CA, I would like to express my strong wish that the CA status of this area be maintained as a result of the forthcoming Appraisal. Over the years the local Residents Association (STARA) has instigated many projects, financed by members, to enhance the area and maintain the style and elegance of its' housing and surrounds. I believe that conservation status is vital for the area to remain such a shining example of the Arts and Crafts movement from its' inception in the early 20th century, and trust that this will continue to be the case.	Y/ No objection	Y/ No objection	Y/ No objection	
18	This is to confirm that I am in favour of maintaining St Agnes Road as a conservation area.	Y/ No objection	Y/ No objection	Y/ No objection	
19	I am concerned there may be a possibility that we may lose our Conservation Area status. I wish to express my support of retaining the St Agnes Conservation Area.	Y/ No objection	Y/ No objection	Y/ No objection	
20	We would like to support the retention of the St Agnes Conservation area in Moseley. We have been residents of this area for over thirty years and really appreciate the unique nature of this area.	Y/ No objection	Y/ No objection	Y/ No objection	
21	I'm aware that Birmingham City Council is currently undertaking a Consultation process regarding the St Agnes Conservation area in Moseley. As residents of Dyott Road, we are strongly in favour of retaining the conservation area and are aware that a lot of work which will support this has already been undertaken by STARA members, reducing the burden on the Council. Please could you register our support, we look forward to seeing the outcome of the consultation.	Y/ No objection	Y/ No objection	Y/ No objection	
22	I'm concerned about, The Appraisal and Management Plan, by Birmingham City Council regarding St. Agnes Road Conservation Area Areas like this are few and far between, so it's important that these areas are appreciated and preserved by the City Council. It's Birmingham's history. People neighbours friends have work tirelessly to maintain this area & its history. It's a close-knit community, therefore this must be considered	Y/ No objection	Y/ No objection	Y/ No objection	
23	Sending this email to confirm our full support of the St Agnes Conservation Area.	Y/ No objection	Y/ No objection	Y/ No objection	
24	I personally support the St Agnes Conservation Area and think it is a very special place.	Y/ No objection	Y/ No objection	Y/ No objection	
25 Victorian Society	<p>Thank you so much for the St Agnes Conservation Area consultation presentation on Wednesday It was excellent and the document reads well I attended on behalf of Tim Bridges for the Victorian Society</p> <p>Apologies for the questions about the paragraphs on Page 6 concerning consideration of possible withdrawal of Area 4 directions from WWII properties and thank you for answering them I misread the first sentence below to infer that all WW11 properties within the area might have Area 4 directions removed. Thank you for confirming that</p>	Y/ No objection	Y/ No objection	Y/ No objection	<p>There is a blanket Article 4(2) Direction on the St. Agnes Conservation Area. It is not proposed to cancel any part of the Article 4 area.</p> <p>Text amended on P.48 as per comments.</p>

	<p>that possibility would only be considered for the 3 infill areas described below and that Area 4 directions for the rest of the WWII properties in the area would remain. Perhaps the paragraphs below could be rewritten to make that clearer.</p> <p>"The Local Authority might consider removing the Article 4 Direction from the modern developments of infill housing within the Conservation Area so as to reduce the management costs of planning applications made within those areas. The areas are Manor Park Close, Mulberry Drive, and St Agnes Close. The houses built in Billesley Lane on the rear of the former Lucas Training Centre (Nos.12 and 32-38) are also modern. The full array of post-WWII houses within the Conservation Area are shown on Plan 1"</p> <p>Thank you also for agreeing to correct P48 to state that Article 4 direction planning applications will require a fee</p>				
26	I would like to support the St. Agnes Residents Conservation Area. (STARA) They do a wonderful job being proactive in very many ways including security and looking after the environment through our chairman, Peter Leadbetter. I am a member and cannot stress too strongly that nothing should be changed.	Y/ No objection	Y/ No objection	Y/ No objection	
27	I am in support of retaining the conservation area of St Agnes In Moseley it is one of the reasons I moved to the area.	Y/ No objection	Y/ No objection	Y/ No objection	
28	I listened to the presentation with interest and as a resident of Grove Avenue, I support the inclusion of the road in the St Agnes Conservation area. I live in a 1970's house and was interested in the discussion about the planning applications for modern properties.	Y/ No objection	Y/ No objection	Y/ No objection	
29	I write to add my support to that of our neighbours in ensuring that the St. Agnes Conservation Area status is maintained. We value the work our STARA committee perform on our behalf and the protections the current conservation status provides us with.	Y/ No objection	Y/ No objection	Y/ No objection	
30	I am writing to support the St Agnes Conservation area. Having lived in the area for 10 years I can only support and praise the benefits of living in a conservation area. The added protection to the wonderful buildings and green spaces is invaluable	Y/ No objection	Y/ No objection	Y/ No objection	
31	<p>I am writing in response to the Draft Character Appraisal and Management Plan for the St Agnes Moseley Conservation Area.</p> <p>My comments are general ones and relate to the description of traffic levels in the area. While I accept that "[t]raffic and its speed has been an increasing problem over the past two decades and the noise, visual intrusion and air pollution caused by streams of</p>	Objection to Wording of character of Oxford Road	Y/ No objection	Y/ No objection	Text on pages 21, 26 and 30 in relation to the character of Oxford Road amended in document to reflect comments.

	<p>vehicles, especially in the morning and evening rush hours, considerably detracts from the character of the Conservation Area...Billesley Lane, Oxford Road and Dyott Road are most affected" (p. 30), I am concerned that, without explanation, such descriptions of the area in the plan might negatively affect the ability of Birmingham City Council to take measures to protect the character of the Conservation Area as containing "quiet suburban residential street[s]' and, indeed, to take measures to resist this threat and protect the Area against proposed developments that would have the effect of perpetuating these problems.</p> <p>I also feel that the document should recognise the currently abnormal levels of traffic in the area since the closure of a few streets to through traffic rather than leaving open the possibility that these exceptional levels are a norm.</p>	regarding traffic and LTN.			
32	I'm very much in support of maintaining the St Agnes Conservation area. This is a beautiful part of Moseley containing excellent examples of Arts and Craft style buildings. It would be sacrilege if the ethos of the area was destroyed leading to unwelcome changes and developments.	Y/ No objection	Y/ No objection	Y/ No objection	
33	I wish to retain the Conservation Area and accept the proposed extension etc.	Y/ No objection	Y/ No objection	Y/ No objection	
34	I support the Conservation Area and the proposed changes	Y/ No objection	Y/ No objection	Y/ No objection	
35	My partner and I wanted to express to you how important we think it is to retain the conservation area. We love walking around the church and surrounding area and it's vital that it is looked after and protected for the wider community to stroll around.	Y/ No objection	Y/ No objection	Y/ No objection	
36	I am writing to comment on the inaccuracy of the traffic on Oxford Road. The road has always enjoyed a low level of traffic. The traffic volume has increased in the last 6 months specifically due to the school road modal filter. Please can this be corrected?	Objection to Wording of character of Oxford Road regarding traffic and LTN.	Y/ No objection	Y/ No objection	Text on pages 21, 26 and 30 in relation to the character of Oxford Road amended in document to reflect comments.
37	I would like the references to historically high rates of traffic on Oxford Road, within the conservation area consultation, to be amended. Oxford Road did not used to suffer from high levels of traffic. The levels have dramatically increased as a result of the modal filter on School Road. It is unacceptable to write off Oxford Road as 'historically'	Objection to Wording of character of Oxford	Y/ No objection	Y/ No objection	Text on pages 21, 26 and 30 in relation to the character of Oxford Road amended in document to reflect comments.



	<p>a 'rat-run'. It did not used to be. The traffic on the road should be strongly mitigated in order to conserve the previous character of the road.</p>	Road regarding traffic and LTN.			
38	<p>As a resident in the St Agnes Moseley Conservation Area, I am writing to object to the characterisation and image portrayed of Oxford Road.</p> <p>The St Agnes Moseley Conservation Area Character Appraisal and Management Plan gives the impression that Oxford Road regularly experiences high levels of traffic, particularly at rush hour. It describes the traffic situation as follows e.g. pg. 21 'Despite their origin as quiet suburban residential streets there is a considerable flow of traffic through the Conservation Area. Traffic is heaviest during weekday rush hours where these routes provide 'rat-runs to avoid heavier traffic on the main roads' and pg. 26 'Oxford Road is an alternative link between Moseley Village and Yardley Wood Road. Consequently, it suffers from quite high traffic levels during the rush hours.'</p> <p>I firmly believe that these assumptions are inaccurate and false, the level of traffic we are suffering is a recent phenomenon and not long-standing.</p> <p>We renounce the above references and ask for them to be withdrawn and correctly redrafted.</p> <p>The recent introduction of the LTN has been restricting and redirecting traffic to alternative side roads and streets. The barriers have impacted various roads positively, such as Cambridge Road, drastically reducing the pollution and heavy stream of vehicles. Other roads such as Oxford road have experienced the opposite effect and traffic is exceeding the usual volume.</p> <p>Although the intentions of the LTN were well-intended, this has changed the traffic flow dynamic of Oxford Road. BCC has a statutory duty to pay particular attention to the desirability of preserving and enhancing the character or appearance of a CA; this goes beyond just decisions on permissions and applies to the exercise by BCC of all its other functions under the planning acts. The extra traffic on OR is detracting from the character and appearance of the CA, through the noise, air pollution and the visual impact of increased activity: it is further losing its character as a 'quiet suburban residential street'. The CA also contains listed buildings (LB), e.g. nos. 110 &amp; 112 OR, outside of which queueing traffic is now common. BCC has a statutory duty to have particular regard for the desirability of preserving LBs and their environments. The increase in queueing traffic is detracting from the setting of these LBs.</p>	<p>Objection to Wording of character of Oxford Road regarding traffic and LTN.</p>	Y/ No objection	Y/ No objection	<p>Text on pages 21, 26 and 30 in relation to the character of Oxford Road amended in document to reflect comments.</p>

	I would also point you towards the statement on pg. 30 ('Pressures on the Conservation Area') 'Traffic and its speed has been an increasing problem over the past two decades and the noise, visual intrusion and air pollution caused by streams of vehicles, especially in the morning and evening rush hours, considerably detracts from the character of the Conservation Area. Billesley Lane, Oxford Road and Dyott Road are most affected.' The School Rd modal filter has significantly added to traffic and speeding, and BCC confirms that 'streams of vehicles' have an adverse effect on the character and appearance of the CA, contrary to the statutory duty.				
39	<p>Thank you for the very full report on the conservation area around St. Agnes church in Moseley.</p> <p>We have lived in Oxford Road for 40year and I would have to say that it has not always been a road with a great deal of traffic. To state that in your report is grossly inaccurate and will give the council an excuse to validate their present policy. I would ask that para 21 is changed to be true to the actual situation in Oxford road which is that the increase in traffic is a recent phenomenon.</p> <p>In fact if the council intend to keep areas such a this as being 'conservation' it should work as hard as possible to maintain the peace and tranquility of the neighbourhood. I fail to see why it would be called a conservation area if nothing is being done to maintain its quality of living. Since the council's scheme to put in LTN's in school road and other nearby roads, the pollution, traffic, noise and speeding has significantly increased. This is not consistent with the area you are trying to create.</p> <p>It is incorrect to saying para 21 that this has always been the case. It is only in the last months that life here has been particularly different. I would point out that the bumps in the road make almost no difference to the present speeding and Billesley Lane continues to experience high speeds which are in danger of causing serious accidents. Please will you amend this in your report.</p>	Objection to Wording of character of Oxford Road regarding traffic and LTN.	Y/ No objection	Y/ No objection	Text on pages 21, 26 and 30 in relation to the character of Oxford Road amended in document to reflect comments.
40 Moseley Society	<p>We should begin by declaring an interest in this subject because The Moseley Society is not a neutral observer but has been an active participant in the process that has led to this draft document. Having been involved in the extended period of work that has resulted in this consultation, we understand, welcome and support:</p> <p>The document as a whole. We regard the speedy adoption of the Appraisal and Management Plan as essential for the long-term protection of this special area of Moseley and of the City of Birmingham.</p> <p>The Management Plan with its guidance, recommendation for enhancement and for ongoing management, and the opportunities for positive future change.</p>	Y/ No objection	Y/ No objection	Y/ No objection	There is a blanket Article 4(2) Direction on the St. Agnes Conservation Area. It is not proposed to cancel any part of the Article 4 area.

	<p>The proposal to extend the Conservation Area and the Article 4(2) Direction to include most of Grove Avenue and also the narrow strip of land in front of the modern houses at the extreme eastern end of St Agnes Road, in order to give the historic sandstone wall and a group of fine trees some protection.</p> <p>The proposal, included in the section on Enforcement, to undertake an annual review of the Conservation Area.</p> <p>We are not in favour of removing the Article 4 Direction from the modern developments of infill housing within the Conservation Area. Some of those houses have been designed with care to complement the character of the St Agnes area. Others may have no special architectural merit but still retain original sandstone front boundary walls and front gardens that would, if removed, damage the character and appearance of the Conservation Area.</p> <p>We understand the reasons for proposing the removal of 25-27 Shelsley Drive and also the new house that has been built on land at the rear of 50 Cotton Lane, now known as 48 Cotton Lane, and have no objection to this part of the proposal.</p> <p>We hope the CAAMP will soon be adopted as 'material consideration' in the planning process and look forward to continuing to work with you and your colleagues to ensure that, as Cllr Martin Straker-Welds sets out, this very special part of Birmingham 'endures for the enjoyment of future generations'.</p> <p>We also wish to record our profound thanks to Dr Terry Slater and to Bob Edmonds for the many hours of skilled work that they have devoted to the production of this document.</p>				
41	<p>We wish to add our support for the adoption of this draft document as a 'material consideration' in the planning process, and in particular the proposal to include 36 Grove Avenue in the Conservation Area.</p> <p>We moved here in 1983 and our surveyor told us that we would need additional beams added into our roof space because a WWII bomb had nearly dislodged the purlins and under a heavy weight of snow the roof might collapse. We've therefore always been aware that our house has a history, and we are glad that the original front windows, and especially the stained glass, survived the bombing. We no longer have the original open porch – our predecessors had had it enclosed with sliding Everest glass doors but twenty years ago we had those replaced with a more traditional porch.</p>	Y/ No objection	Y/ No objection	Y/ No objection	



	<p>As I type I can look across to a skip in front of No. 37 Grove Avenue. Last week I watched with sadness as the chimney was demolished and the bricks added to the skip, knowing that without the protection of Conservation Area status, including an Article 4 Direction, there was no reason for the chimney to be restored and retained.</p> <p>We have a large lime tree at the bottom of our garden, and we come under pressure from people living in the School Road houses that we back onto to have the tree pollarded, if not felled. We have just had work done on it for the second time since we moved in – but it is already regrowing, and we hope that it will outlive us all! We think it might have been part of a row of trees that lined the entrance drive to The Grove, shown on the 1888 map, as many of the houses on our side of Grove Avenue have mature trees in their gardens. Some of those trees suffered extensive damage in the 2005 tornado and have since been felled, but those that survived are mostly thriving and we look forward to the protection that inclusion in the Conservation Area will give them.</p>				
42 Moseley Regeneration Group	<p>We are pleased to see the draft CAAMP for the St Agnes Conservation area. As one of the most important and coherent residential areas in Moseley it is entirely appropriate that proactive steps should be taken (i) to record in detail the nature of what is already there and (ii) establish what steps are necessary for conserving and enhancing the status quo. The draft document does this in full, and we believe the policy guidance for planning to be especially helpful. The recent and forthcoming changes to the planning frameworks at national level leave areas such as St Agnes exposed to alterations and developments, many under Permitted Development Rights, that would cause irreversible damage and loss. For this reason, the Article 4 direction is also especially welcome. The draft plan is consistent with the aims and objectives articulated in the Moseley SPD and for that reason the Moseley Regeneration Group supports the document unreservedly.</p>	Y/ No objection	Y/ No objection	Y/ No objection	
43	<p>I write in respect of the above consultation to <b>OBJECT</b> to the following –</p> <ul style="list-style-type: none"> <li>• Conservation Area Appraisal and Management Plan (CAAMP) and</li> <li>• Proposed boundary amendments to the designation.</li> </ul> <p>I have no comments to make on the Article 4 Direction, other than to request greater enforcement as there have been plastic windows put in a few of the properties in the last few years and roofing materials have been changed, presumably without reference to yourselves.</p> <p>I also request that consideration is given to widening the St Agnes Conservation Area to include other fine examples of late Victorian and Edwardian housing.</p>	Objection to Wording of character of Oxford Road regarding traffic and LTN.	Y/ no objection but recommend inclusion of more areas.	Y/ no objection	<p>Response to point 1- description of character and appearance of conservation area: Text on pages 21, 26 and 30 in relation to the character of Oxford Road amended in document to reflect comments.</p> <p>Response to point 2- drafting errors in document and plans: There was a placement error on the proposed boundary changes map. The proposed</p>

	<p>My representations are set out below –</p> <p><b>Incorrect description of the prevailing character of the Conservation Area</b></p> <p>The CAAMP gives the impression that Oxford Road normally suffers high levels of traffic, especially at rush hour. It incorrectly describes the traffic situation as follows e.g. pg. 21 ‘Despite their origin as quiet suburban residential streets there is a considerable flow of traffic through the Conservation Area... Traffic is heaviest during weekday rush hours where these routes provide ‘rat -runs’ to avoid heavier traffic on the main roads’ and pg. 26 ‘Oxford Road is an alternative link between Moseley Village and Yardley Wood Road. Consequently it suffers from quite high traffic levels during the rush hours.’</p> <p>These are incorrect descriptions of the situation that existed <u>prior</u> to the introduction of the initiatives under ‘Places for People’ in Kings Heath and Moseley where a number of roads have been blocked off by modal filters including nearby School Road and Cambridge Road. The introduction of the modal filters has meant that Oxford Road is currently experiencing abnormally high levels of displaced traffic, but this was not the case prior to the installation of the modal filters. As you may know, the measures introduced were emergency measures, without consultation, and there has been a lot of negative feedback locally as the amount of traffic displaced onto Oxford Road has been detrimental in many ways.</p> <p>It is important that this incorrect reference to the character of the St Agnes Conservation Area is amended, as the Foreword states the CAAMP will ‘define its [the CA’s] character’ and the Introduction states it will, inter alia, provide a sound basis for the determination of planning applications within the Conservation Area and the formulation of proposals for its preservation and enhancement.’ The character of the St Agnes Conservation Area is one of low traffic – the huge increase in traffic is a recent phenomenon we are suffering.</p> <p>The Council has a statutory duty to pay special attention to the desirability of preserving or enhancing the character or appearance of the Conservation Area, which goes beyond just decisions on permissions and applies to the exercise by BCC of all its other functions under the planning acts. The extra traffic currently displaced on to Oxford Road is detracting from the character and appearance of the Conservation Area, through noise, air pollution and the visual impact of increased activity: it is losing its character as a ‘quiet suburban residential street’. The Conservation Area also</p>				<p>boundary changes map at Plan 1 of the document is correct.</p> <p>Response to point 3- inclusion of new areas: To include further areas would require a further consultation period. Recommend these areas are looked at as part of the next review of the St. Agnes CA. To include further areas would require a further consultation period. Recommend these areas are looked at as part of the next review of the St. Agnes CA.</p>
--	----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	--	--	--	-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

	<p>contains Listed Buildings, e.g. nos. 110 &amp; 112 Oxford Road, outside of which queueing traffic is now common. The Council has a statutory duty to have special regard to the desirability of preserving Listed Buildings or their settings or any features of special architectural or historic interest which they possess. The increase in queueing traffic is detracting from the setting of these Listed Buildings.</p> <p>Please note that I do support the reference in the CAAMP at pg. 30 ('Pressures on the Conservation Area') which states: "Traffic and its speed has been an increasing problem over the past two decades and the noise, visual intrusion and air pollution caused by streams of vehicles, especially in the morning and evening rush hours, considerably detracts from the character of the Conservation Area...Billesley Lane, Oxford Road and Dyott Road are most affected.' As above, the significant increase in traffic has been a result of the emergency introduction of modal filters elsewhere in Kings Heath and Moseley; however, reference in the CAAMP to the fact that the noise, visual intrusion and air pollution caused by streams of vehicles considerably detracts from the character of the Conservation Area is agreed and whilst not entirely relevant to the current consultation, it is incumbent on the Council which has a statutory duty in relation to the exercise of its functions that it does not undertake actions that conflict with that duty. I consider the introduction of the referenced modal filters and the consequent increased in vehicular activity, including queueing and beeping horns along Oxford Road, as well as the reduced air quality, have a negative effect on the character and appearance of the Conservation Area, contrary to the statutory duty.</p> <p><b>Drafting errors in the CAAMP and accompanying plans</b></p> <p>It is noted that the plan in the CAAMP showing the boundary of the existing St. Agnes Conservation Area is not commensurate with the existing boundary shown on the standalone proposed Boundary changes plan. It excludes existing parts of the Conservation Area and implies that currently excluded areas are already within it. This error is confirmed in the text of the CAAMP, e.g. on the proposed boundary changes plan, no. 18 Grove Avenue is shown to be included in the existing Conservation Area boundary, whereas in the original plan, it is excluded. In addition, there is a photograph of no. 18 Grove Avenue included in CAAMP at pg. 7 under Designation and boundary changes' with a title 'It is suggested these houses be included in the Conservation Area'.</p> <p>It is also noted that the plan on pg. 8 is inconsistent with the standalone plan. It appears the boundary overlay on the standalone plan has been drafted in error, e.g. St</p>				
--	------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	--	--	--	--



	<p>Agnes Church Hall is referenced in the document as included, and shown as such on the plan on pg. 8, but is excluded in the standalone plan.</p> <p><b>Suggested boundary amendments to the Conservation Area designation</b></p> <p>In addition to the above comments, I consider that additional parts of Moseley should be included in the Conservation Area - or be included in a standalone designation. These include other roads in the Moseley 'Triangle', a term coined by local people as having a uniform character of large properties/ villas in a verdant setting. I consider the late-Victorian and Edwardian developments on Greenhill Road, Prospect Road and Blenheim Road should be included, as well additional parts of the southwestern end of Cotton Lane, School Road and the top of Grove Avenue. I set out below some photographs of these areas. I consider these roads have a special character which, whilst not necessarily part of the St. Agnes Conservation Area's character and style, are equally worthy of protection to stop any further erosion of character by loss of windows, front walls, loss of trees and the addition of hardstanding. It is noted that some of these roads do contain modern housing developments, but it is also noted that the existing Conservation Area includes more modern housing development, e.g. Mulberry Drive, St Agnes Close and Manor Park. Inclusion of the suggested additional roads will ensure that inappropriate development of these properties and their plots can be better resisted. I would urge you to visit these roads and walk around them with a view to extending the Conservation Area to include these, or consider an additional designation, to include these examples.</p> <p><b><u>Conclusions</u></b></p> <p>In summary, I object to wording in the St Agnes Conservation Area Appraisal and Management Plan (CAAMP) which incorrectly describes Oxford Road as normally suffering from high levels of traffic; this is a recent phenomenon which has been created by the 'Places for People' initiative in Kings Heath and Moseley. It is important that this incorrect reference to the character of the Conservation Area is amended as the CAAMP seeks to define the Conservation Area's character and provide a sound basis for the determination of planning applications within it, as well as the formulation of proposals for its preservation and enhancement. The character of the St Agnes Conservation Area is one of low traffic. I support the acknowledgement in the CAAMP of the adverse impact of extra traffic on the Conservation Area.</p>				
--	------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	--	--	--	--

	<p>I also request that the drafting errors in the CAAMP and the accompanying plans are rectified, for the avoidance of doubt.</p> <p>Finally, I urge you to look at extending the Conservation Area to the wider area to include more of the Moseley Triangle, including more of Cotton Lane, Grove Avenue, Greenhill Road, Prospect Road, School Road and Blenheim Road. I consider the late-Victorian and Edwardian developments on these roads are equally worthy of protection.</p>				
44 Birmingham Civic Society	BCS are very supportive of this work and our only query was whether parts of School Road should be included	Y- No objection	Y- No Objection but recommend more areas included.	Y- No objection	To include further areas would require a further consultation period. Recommend these areas are looked at as part of the next review of the St. Agnes CA.
45	<p>Having read the draft St Agnes Conservation Area Action &amp; Management Plan (CAAMP) and having resident in Oxford Road for 27 years we wish to make the following points.</p> <p>1) The CAAMP falsely gives the impression that Oxford Road has ordinarily suffered from high levels of traffic, especially at rush hour over a considerable period of time. Therefore any plan drawn up on the basis of this fallacy is likely to be incorrect.</p> <p>In fact the level of traffic has increased enormously since the introduction of the Low Traffic Neighbourhood (LTN) measures, which included closing School and Cambridge Roads, which resulted in significantly more traffic in Oxford Rd. The extra LTN traffic on Oxford Road is detracting from the character and appearance of the CA, through noise, air pollution and the visual impact of increased activity: it is further losing its character as a 'quiet suburban residential street'.</p> <p>We particularly object to the wording on pg. 30 ('Pressures on the Conservation Area') that "Traffic and its speed has been an increasing problem over the past two decades and the noise, visual intrusion and air pollution caused by streams of vehicles, especially in the morning and evening rush hours, considerably detracts from the character of the Conservation Area...Billesley Lane, Oxford Road and Dyott Road are most affected.'</p> <p>Again it is the recent introduction of the LTN that has significantly added to traffic and speeding, and the Council has confirmed that 'streams of vehicles' have a negative effect on the character and appearance of the CA, contrary to the statutory duty."</p>	Objection to Wording of character of Oxford Road regarding traffic and LTN.	Y- No objection	Y-no objection	Text on pages 21, 26 and 30 in relation to the character of Oxford Road amended in document to reflect comments.

46	<p><b>Traffic</b></p> <p>There are two comments (page 21 and 26) in the proposed CAAMP that imply that Oxford Road (OR) normally suffers from high traffic. I would like to state that the character of OR is that of a quiet suburban road and it is the planning and transport decisions of Birmingham City Council over the last 1-3 years that have resulted in the road becoming more used by vehicles and in particular since the modal filter was installed on the neighbouring School Road (in 2020) become a major rat run where it now has heavy vehicles and significant number of cars. The introduction of a right turn on Wake Green Road to facilitate traffic to the new Marks and Spencer supermarket at the corner of Wake Green Road and OR has also facilitated vehicles entering OR and using it as a rat run. I would like the CAAMP to describe the character of the area as it is "a quiet suburban street" and for the objectives of the CAAMP to clarify that planning decisions should be taken to return it to its original character before the implementation of planning decisions which have negatively impacted on the character of the conservation area.</p> <p>On page 26 the term "alternative link" is used to imply that it is the role of the road to act as a link between Moseley and Yardleywood Road. I object to this term and implication. OR is a residential road which links together other residential roads such as Greenhill Rd, Grove Road, and Cotton Lane. It is not a link between a major shopping centre and a B road (Yardley Wood Road), that link is Wake Green Road. It is being used as a rat run because of planning decisions taken by the Council (modal filter and right turn). In particular it is being used as a rat run because the Council has not taken steps to protect the character of the area such as a modal filter and instead has actively put in place decisions that impact detrimentally on the character of the CA.</p> <p><b><u>Pressures on Conservation Area</u></b></p> <p>I support the statement on page 30 which refers to "Traffic and its speed....streams of vehicles...significantly detracts from the character of the Conservation Area" While I may argue the timeframe in which this has occurred there is no doubt that especially since the School Road modal filter and the right hand turn onto OR from WGR these high levels of traffic have emerged. I believe that it is the responsibility of the CAAMP to clearly state that this situation has impacted negatively on the character of the CA (quiet suburban road) and a planning objective is to return its character a few years ago. Surely the Council cannot make decisions to negatively impact on the character of the CA and then after they have done this say "oh well the character is now X" having actively changed it from Y.</p>	Objection to Wording of character of Oxford Road regarding traffic and LTN.	Y/No objection	Y/no objection	Text on pages 21, 26 and 30 in relation to the character of Oxford Road amended in document to reflect comments.
----	----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	-----------------------------------------------------------------------------	----------------	----------------	------------------------------------------------------------------------------------------------------------------



	<p>The noise, pollution and general character of the CA is being seriously impacted by the increased traffic due to the modal filter. It is just not possible to protect houses in this area from the effects of the pollution (particularly the listed buildings) and in particular residents cannot put in appropriate double glazing to sound proof their houses. If the Council stops caring about the CA there is always the risk that residents will as well and may think why are we following all the rules and applying for planning permission to change a window or a drive when clearly the Council is not concerned.</p> <p>I hope that you and the conservation team do all you can to protect the buildings and character of St Agnes conservation area. We rely on you.</p>				
47	<p><b>Article 4 Direction</b></p> <p>I am concerned as to why No88 Oxford Road is not included in the Third Schedule. Although this house is built to a different design to others immediately surrounding it, it is still a very important house in the street setting and I feel that it is vital for it to be included in the Third Schedule along with all the other houses.</p> <p>Is this an oversight or is there a specific reason for this?</p> <p>No88 is in rather poor condition but it is likely to be turned into a single dwelling house before too long. I feel that it is vital to the street scene of Oxford Road for this house to be improved in a manner appropriate for the Conservation Area. I would ask for this house to be included in the Third Schedule.</p> <p><b>Draft Management Plan</b></p> <p>Page 16 makes two references to Plan 6 but I couldn't find a Plan 6?</p> <p>On page 26 under the top photograph the spelling of J Brewin Holmes is 'Homes'</p> <p>The photograph on page 36 has attributed the design to W de Lacy Aherne. This house (no84 - our attached neighbours) was designed by J Brewin Holmes (I have a copy of the plans).</p> <p>I am concerned by the various references to the traffic on Oxford Road -</p> <p>High levels of traffic certainly detract from the character of the Conservation Area. However, the way this is referenced in the Plan gives the impression that it has become acceptable for Oxford Road to be a busy road. I do not feel that high levels of</p>	<p>Objection to Wording of character of Oxford Road regarding traffic and LTN.</p>	<p>Y/ No objection</p>	<p>Query but Y/ No objection</p>	<p>Text amendments made to document to reflect comments.</p> <p>To include further areas would require a further consultation period. Recommend these areas are looked at as part of the next review of the St. Agnes CA.</p> <p>No. 88 Oxford Road is covered by the Article 4 direction.</p>

	<p>traffic are acceptable and I would like references to the busy traffic to be reframed to make it clear that this level of traffic is inappropriate for, and considerably detracts from, the Conservation Area, in the same way as, for example, 1960s dormers or windows, or the loss of garden walls for driveways etc are referenced as being inappropriate or as detracting from the character of the area.</p> <p>It is also the case that the current higher levels of traffic are due to the 'modal filter' on School Road and this is further detracting from the character as the 'quiet suburban residential street'. There are higher levels of traffic than previously at all times. Before the installation of this filter the road was much quieter. Higher levels of traffic certainly lead to a poorer sense of 'belonging' and community and this could in turn lead to an erosion of the care that residents take with their properties, leading to an erosion of the character of the Conservation Area.</p> <p>I worry that if references to high levels of traffic on the road are not all qualified as 'inappropriate' or 'undesirable' or 'detracting from the character of the Conservation Area' - or just removed -, this may give the impression that these levels of traffic are acceptable to the officers of the conservation department, and may mean future development that would create further traffic will not be able to be turned down on the basis of the extra traffic that would be created, further eroding the character of the Conservation Area.</p> <p>I am concerned by the references to Oxford Road being an 'alternative route' (page 21) and 'alternative link' (page 26) between Moseley Village and Yardley Wood Road. I do not want to see these references included as it implies this situation is acceptable to the Conservation Department. It is fundamentally unacceptable that traffic uses Oxford Road as a cut-through when there is a road - Wake Green Road - designated for this purpose. Oxford Road was designed as quiet residential road and this quiet suburban character is exactly what the Management Plan should be doing its utmost to maintain or enhance.</p> <p>I object to any references that may imply that high levels of traffic on Oxford Road are normal or acceptable.</p>				
48	<p>We are writing as residents of Grove Avenue. Moseley in response to the proposal to extend the St Agnes Conservation area. The changes as set out in the consultation documents and Conservation Area Management Plan would include our property within the extended conservation area. We support this principle and the proposal.</p>	Y/No objection	Y/No objection Support for inclusion	Y/ No objection	

	We attended the online meeting about the proposals and found this session information.		from Grove Avenue resident		
49	<p>I am strongly in favour of the retention - and promotion - of the St Agnes Conservation Area. I am a resident. We have a long-established ethos of community collaboration, with strong voluntary support for initiatives that seek to make the St Agnes Conservation area a pleasant and safe place.</p> <p>For example:</p> <p>We work closely with WMP. We have an excellent roster of volunteers for our WMP Street watch patrols.</p> <p>We work with the Council. We collect up - at an early stage - the rubbish that is regularly jettisoned from passing - or parked - cars . We also alert the Council promptly about fly-tipping matters. In this way, we strive to make our area a more pleasant place for anyone who lives and works, or cycles or walks through.</p> <p>Well-being. We have our own community bench (with tubs of flowers) near St Agnes Church which many people « passing through » use for relaxation, contemplation and conversation.</p> <p>These are but two examples where the existence of a Conservation Area encourages a broad spectrum of collaborative initiatives that contribute to community cohesion. It goes far, far wider that the important issues of conservation of our important built environment which has been so ably documented by residents and people who care</p> <p>I urge the continuation of support for the St Agnes Conservation Area.</p>	Y/ No objection	Y/ No objection	Y/No objection	
50	<p>The proposal has been very carefully documented and is an eminently sensible change on existing parameters. The modest changes are logical improvements that form a coherent whole in preserving a collection of houses that are mainly from the period 1890-1920. There have been considerable alterations in the past, with conversion to multiple occupancy and building not in keeping with the original ethos. However, there remains remarkable unity of character and a singleness of purpose that makes the area unique.</p> <p>The chief reason for the conservation's integrity is the St. Agnes Residents Association: it holds three meetings a year to keep residents aware of local issues it sponsors a weekly Street watch patrol that notes petty crime, including fly-tipping, littering, possible drug dealing, speeding traffic, and lapses in property security; it</p>	Y/No objection	Y/No objection	Y/ No objection	



	<p>cooperates with West Midlands Police but its role is purely advisory, it complements the Moseley Society, with a very specific local focus</p> <p>The chief benefit of the conservation area status is that gives its residents a sense of identity. To give one example: individuals collect litter, and not merely outside their own houses. At a time when, with continual cuts in public services through reduced funding and increased costs, voluntary efforts are significant, and without conservation area status, that effort will become weaker</p>				

Title of proposed EIA	St. Agnes Moseley Conservation Area Appraisal and Management Plan
Reference No	EQUA905
EA is in support of	New Policy
Review Frequency	No preference
Date of first review	01/07/2027
Directorate	Inclusive Growth
Division	Planning and Development
Service Area	City Design and Conservation
Responsible Officer(s)	<input type="checkbox"/> Julie Shaduwa
Quality Control Officer(s)	<input type="checkbox"/> Richard Woodland
Accountable Officer(s)	<input type="checkbox"/> Andrew Fuller
Purpose of proposal	PRESERVATION AND ENHANCEMENT OF THE CHARACTER OF THE CONSERVATION AREA
Data sources	Consultation Results; relevant reports/strategies
Please include any other sources of data	
ASSESS THE IMPACT AGAINST THE PROTECTED CHARACTERISTICS	Y
Protected characteristic: Age	Not Applicable
Age details:	
Protected characteristic: Disability	Not Applicable
Disability details:	
Protected characteristic: Sex	Not Applicable
Gender details:	
Protected characteristics: Gender Reassignment	Not Applicable
Gender reassignment details:	
Protected characteristics: Marriage and Civil Partnership	Not Applicable
Marriage and civil partnership details:	
Protected characteristics: Pregnancy and Maternity	Not Applicable
Pregnancy and maternity details:	
Protected characteristics: Race	Not Applicable
Race details:	
Protected characteristics: Religion or Beliefs	Not Applicable
Religion or beliefs details:	
Protected characteristics: Sexual Orientation	Not Applicable

Sexual orientation details:

Socio-economic impacts

Please indicate any actions arising from completing this screening exercise.

Please indicate whether a full impact assessment is recommended

NO

What data has been collected to facilitate the assessment of this policy/proposal?

Analysis of the character of the St. Agnes Moseley Conservation Area and drafting of the Selly Park Conservation Area Appraisal and Management Plan and existing boundry. The analysis has informed the key objective of the management of the historic environment and secondry objective of promoting best practice and positive intervention.

Consultation analysis

All residents in the conservation area and those affected by the boundary amendments. Local residents groups and amenity societies including Birmingham Civic Society and Victorian Society, and stakeholders Historic England. The overall outcome of the consultation was positive support for the document and the boundary amendments.

Adverse impact on any people with protected characteristics.

None identified

Could the policy/proposal be modified to reduce or eliminate any adverse impact? None identified

How will the effect(s) of this policy/proposal on equality be monitored?

Monitoring and review will take place through the statutory monitoring of the Conservation Areas as required by the Planning (Listed Buildings and Conservations Areas ) Act 1990.

What data is required in the future?

None identified

Are there any adverse impacts on any particular group(s)

No

If yes, please explain your reasons for going ahead.

Initial equality impact assessment of your proposal

The purpose of the policy is to provide formal planning guidance in order to Protect and enhance the St. Agnes Moseley Conservation Area. The Review proposes a Conservation Area Appraisal and Management Plan, revision to existing boundary and associated policies that identify the



unique architectural and historical character of the Conservation Area. The outcome of this review and recommendations is the prevention of the deterioration of the Conservation Area and development which contributes to the special character of the area.

The Review should have a positive affect on service users and the wider community by ensuring policies are in place which contribute to enhanced environments, better quality design and the protection of local heritage and culture.

A full EA is not required because it is not considered that the revisions proposed will disproportionately impact on any particular group. The revisions will contribute to equality of opportunity for all by providing a statutory planning guidance for change and development which respects the special character of the Conservation Areas.

Consulted People or Groups

Informed People or Groups



Summary and evidence of findings from your EIA

The assessment is that the St. Agnes Moseley Conservation Area Appraisal and Management Plan and proposed boundary amendments to the conservation area will not disproportionately affect any protected group. This finding has been tested through implementation of a robust consultation plan that involved representative groups and informed all affected residents. Consultation findings have been subsequently used to review the new policy document and the proposed amendments to the designated area.

## QUALITY CONTORL SECTION

Submit to the Quality Control Officer for reviewing?

No

08/06/2022, 09:17		Assessments - St. Agnes Moseley Conservation Area Appraisal...	
Quality Control Officer comments			
Decision by Quality Control Officer		Proceed for final approval	
Submit draft to Accountable Officer?		Yes	
Decision by Accountable Officer		Approve	
Date approved / rejected by the Accountable Officer		06/06/2022	
Reasons for approval or rejection		This work will not disproportionately affect any protected group and is approved.	
Please print and save a PDF copy for your records		Yes	
Content Type: Item			
Version: 44.0			
Created at 10/05/2022 03:26 PM by  Julie Shaduwa			
Last modified at 06/06/2022 05:25 PM by Workflow on behalf of  Julie Shaduwa			

Close

# Birmingham City Council

## Report to Cabinet

26 July 2022



<b>Subject:</b>	Birmingham '3 Cities' Whole House Retrofit Pilot
<b>Report of:</b>	Julie Griffin, Strategic Director, City Housing
<b>Relevant Cabinet Member:</b>	Councillor Sharon Thompson, Cabinet Member Housing and Homelessness Councillor Yvonne Mosquito, Cabinet Member Finance and Resources
<b>Relevant O &amp; S Chair:</b>	Councillor Mohammed Idrees, Housing and Neighbourhoods Councillor Akhlaq Ahmed, Resources
<b>Report author:</b>	Steve Wilson, Housing Director, Asset Management City Housing <a href="mailto:Steve.Wilson@Birmingham.gov.uk">Steve.Wilson@Birmingham.gov.uk</a> Guy Chaundy, Senior Manager Housing Strategy, City Housing <a href="mailto:Guy.Chaundy@Birmingham.gov.uk">Guy.Chaundy@Birmingham.gov.uk</a>

Are specific wards affected?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No – All wards affected
If yes, name(s) of ward(s): Bromford and Hodge Hill		
Is this a key decision?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No
If relevant, add Forward Plan Reference: 009767/2022		
Is the decision eligible for call-in?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No
Does the report contain confidential or exempt information?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
If relevant, provide exempt information paragraph number or reason if confidential: No		



## 1. Executive Summary

- 1.1. This report sets out Birmingham's initial contribution to the developing 3 cities retrofit programme and presents the options that have been explored, as detailed in the appended enhanced Business Case (Appendix 1). It further sets out the approvals for investment required to modify up to 300 Housing Revenue Account (HRA) Council Properties as a pilot, to test approaches to improve their thermal efficiency, reduce carbon emissions, and provide energy savings for tenants. To realise these benefits this report sets out the proposed pilot approach and seeks Cabinet approval to:
- Proceed with a pilot involving up to 300 properties<sup>1</sup> in East Birmingham.
  - Invest £25.986m capital and £2.203m revenue over 30 years (as set out in the table at 8.3.4). £18.064m has already been built into the HRA investment plan, there remains further pressures on the capital investment budget. These can be reduced, if not mitigated, by the introduction of the comfort plan and grant funding as detailed in this report.
  - Assess opportunities to reduce the total funding requirement through access to existing and new grant funding opportunities<sup>2</sup>.
- 1.2. The pilot directly supports Birmingham's bold ambition to deliver best in class housing services, placing the Council front and centre in addressing fuel poverty in an affordable and achievable way by developing and implementing innovative solutions and funding models to scale up whole house retrofit.
- 1.3. The social value outcomes expected to be achieved as a result of the pilot are in accordance with BCC's Social Value Policy and the Birmingham Business Charter for Social Responsibility and are detailed in Section B4 of Appendix 1.
- 1.4. The scale of the Council's stock ownership is large (c. 60,000 homes); the delivery of the Whole House Retrofit Pilot presents a material opportunity for BCC to progress towards its net zero carbon ambitions, and to make a significant contribution to economic recovery and growth through employment and skills opportunities for local businesses and the local community, and the economic benefits this can bring to the City in addition to creating a healthy community supporting a just transition.
- 1.5. The pilot scheme is intended to make a step towards these ambitions while allowing the Council to apply an incremental learning approach to works, incorporate future technology available, and begin the route to zero work on Council stock without committing the Council to unaffordable levels of borrowing.

---

<sup>1</sup> The scope of the Whole House Retrofit Pilot is for 300 properties of two archetypes, cross wall houses and low-rise flats. Combined, these two archetypes comprise between 35-40% of the non-high rise BCC social housing stock

<sup>2</sup> It is intended to access Social Housing Decarbonisation Fund (SHDF), Wave 2 funding (circa £700m) for the Whole House Retrofit Pilot and for other social housing properties across Birmingham

- 1.6. Alongside the retrofit pilot detailed in this paper, the HRA has a budget built into the 10-year plan for redevelopment, between £40m-£80m per annum. The pilot, funded from the Housing Improvement budget within the HRA, is to trial retrofit on 300 properties in order to open up funding opportunities, find efficiencies in technology and process, and stimulate the market towards retrofit, so that a mix of retrofit and rebuild can be used to meet the carbon reduction targets on the entire Council stock over the longer term.

## 2. **Recommendations**

That Cabinet:

- 2.1. Approves the Business Case attached at Appendix 1.
- 2.2. Approves the approach to proceed with the Whole House Retrofit Pilot of 300 HRA Council properties in East Birmingham using two approaches:
- Using the existing contracting arrangements to upgrade approximately 174 low-rise flats to an Energy Performance Contract (EPC) B+ rating
  - Using the innovative Energiesprong approach to upgrade 126 cross-wall properties to an Energy Performance Contract (EPC) A rating.
- 2.3. Approves the provision of £17m HRA capital funding to upgrade up to 300 properties to be met from the existing Capital Investment Programme, and approves spending up to a further £11m to be funded from additional income sources, Right to Buy receipts and grants, or from further HRA borrowing if required.
- 2.4. Approves the recommendation to engage and consult with the affected tenants and their communities in the Bromford and Hodge Hill area of East Birmingham. The properties will be selected using the archetype criteria detailed in the Business Case and agreed by the Strategic Director City Housing.
- 2.5. Approves the Procurement Strategy attached at Appendix 3.
- 2.6. Delegates authority to:
- The Strategic Director City Housing to vary the split of archetypes for each solution within the approved cost envelope to manage delivery within any arising supply side and manufacturing constraints.
  - The Strategic Director, City Housing (or their delegate) in conjunction with the Director of Council Management (or their delegate) and the City Solicitor and Monitoring Officer (or their delegate) to:
    - Utilise the existing Housing Repairs and Maintenance contractual arrangements with Equans, as part of the 2022-2024 Capital Programme, to deliver the WHR upgrade to 174 low-rise flats to EPC B+.

- Commission the Energiesprong WHR solution to 126 cross-wall homes, making a direct award to Equans via the Fusion 21 Decarbonisation Framework Lot 1: Whole House Decarbonisation.
- Work with Energiesprong UK to access lessons learned in relation to retrofit solutions, costings and commercialisation and emerging best practice via the RAHIP partnership collaboration hub.
- Submit bids for and accept available grant funding to support delivery of the pilot from the Greater Birmingham and Solihull Local Enterprise Partnership (GBSLEP) Growing Places Fund, the Social Housing Decarbonisation Fund (SHDF) and other relevant grant funding opportunities.
- As part of the 2 year pilot introduce the Energiesprong 'Comfort Plan'<sup>3</sup> mechanism which improves the energy efficiency of homes, benefits tenants and provides the Council with a contribution to investing in retrofitting more stock and the wider scaling of WHR.

2.7. Authorises the City Solicitor and Monitoring Officer to negotiate, execute and complete all necessary documentation to give effect to the above recommendations.

### **3. Background**

- 3.1. BCC is one of the largest landlords in the UK. It is responsible for 15% of the total housing stock in the city, some 60,000 homes, with a mix of high and low-rise flats, detached, semi-detached and terrace properties. BCC needs to improve the thermal efficiency of its housing stock to reduce carbon emissions, reduce energy bills, address fuel poverty and support a just transition to a zero carbon city as part of delivering the Council's net zero priority and a wider Asset Management strategy for long term investment requirements.
- 3.2. BCC's housing stock is a large net contributor to the city's carbon emissions. The BEIS 'City Decarbonisation of Heat-Delivery', September 2020 reports that the greenhouse gas (GHG) emissions arising from overall domestic heating accounts for 26% of the City's total GHG emissions which are estimated at circa 4,251ktCO<sub>2</sub>e. Tackling these heat emissions and achieving a 'net zero' position is key to BCC achieving its Route to Zero (R20) priorities.
- 3.3. BCC have a number of projects currently in place such as Large Panel System (LPS) pilot and Local Authority Delivery grant schemes, these follow a national government (grant funding) strategy that seeks to raise the energy efficiency of low-income and low EPC (E,F&G) rated homes to EPC C.<sup>4</sup> These projects have provided a source of learning and act as a positive step in the right direction, but

---

<sup>3</sup> The Comfort Plan is described in the Business Case, Appendix 4.

<sup>4</sup> Through the Clean Growth Strategy (2017), the UK government has set a target for social housing providers to attain the minimum rating of Energy Performance Certificate (EPC) C for rented properties by 2035 (2030 for 'fuel poor' households).

they are limited in scale and scope and are reliant on public sector grant funding which in relative terms is small and often very time limited. Rapid scaling up is necessary and this requires adjustments to scope, delivery models and financing models. BCC wishes to develop a platform to address its wider social housing estate. To do this there is a need to explore different options that offer a realistic means of scaling up as well as learning lessons from other local authority schemes.

- 3.4. The cost of addressing the entirety of BCC's 60,000 homes has been estimated to be more than £3.6bn over 30 years. Sourcing the funds and planning to address this is a significant challenge for BCC. The Council's existing budgets are already committed to deliver frontline services. There is limited funding available, hence a creative financial solution is required that ensures costs and benefits are spread equitably. Although the solution will come through BCC leadership, it cannot come solely at BCC's cost. The plan is to explore alternative technical solutions and funding models as part of the pilot learning.
- 3.5. The Pilot presents a bold and innovative opportunity to build on local, regional and national ambitions to reduce carbon emissions, deliver future-proofed retrofit for BCC's 'worst-first' properties and address fuel poverty in East Birmingham through improved performance and reduced energy bills. Critically the project directly advances local and national inclusive growth, supports the Council's levelling up strategy and '3 cities' approach and 'build back better' objectives. Increased inclusivity of growth will be derived from place-based regeneration, focusing on 'worst-first' housing and 'green growth' through growing jobs, skills and the low carbon economy.
- 3.6. The scope of the WHR Pilot is for 300 properties of two archetypes, cross wall houses and low-rise flats. Combined, these two archetypes comprise between 35%-40% of the non-high rise BCC social housing stock overall. It is expected that the findings and outcomes of the pilot will play a significant role in contributing to the direction and approach adopted in BCC's longer-term housing strategy to decarbonise the housing stock and improve resident health and wellbeing.
- 3.7. One option to the delivery of whole house retrofit and financing, is an innovative partnership approach based on the Energiesprong model.
- 3.8. The Energiesprong model as described in Appendix 5, provides a scalable and affordable solution whilst delivering energy cost benefits to residents and lowering carbon emissions.
  - 3.8.1. Energiesprong is a proven solution in the Netherlands and relatively new to the UK, with active pilots across a number of social landlords in the UK. The market is maturing – it is an innovative approach to undertaking whole house retrofit and is distinguished by:
    - 3.8.1.1. The Performance Management Framework - a guarantee by the solution provider to the resident of a minimum level 'Comfort Plan' of hot water, heating and electricity for an agreed level of energy consumption.



- 3.8.1.2. The Comfort Plan is described in greater detail in Appendix 4. The household comfort plan is an agreement between BCC and the tenant which establishes a kWh/year consumption and comfort plan charge for guaranteed 'comfort' outcomes. This enables tenants to warm their homes, have access to hot water and power electrical appliances with significantly reduced energy consumption, providing tenants with some protection against energy price inflation and the Council with a contribution to investing in retrofitting more stock and the wider scaling of WHR.
- 3.8.1.3. The comfort plan charge is an amount charged by BCC to the tenant representing a share of the savings made / costs avoided by the tenant. This provides a contribution to BCC which is required to support the wider scaling of WHR across the whole housing stock.
- 3.8.1.4. Performance Guarantee - the solution provider guarantees:
- Planned maintenance costs of the retrofit improvement works over 10 years
  - Equipment replacement cycles and costs over 10 years
  - Energy performance (kW) over 10 years assuming the residents operate their homes within the agreed comfort plan.
- 3.9. With a whole house retrofit approach there are clear social economic opportunities to create infrastructure, employment, supply chain, manufacturing etc. Cost reductions can be achieved as cost reduction is primarily a function of volume not of time, e.g. if there is a secure and steady demand for net zero energy retrofits industry can respond to this demand and invest in innovation as well as off-site manufacturing capability/capacity.
- 3.10. The Council has set out in its Levelling Up Strategy an approach to tackle inequality and includes a commitment to tackle fuel poverty through retrofitting housing stock and references working regionally with the '3 cities'. The recommendations in this report and the pilot approach will assist in developing the social economic opportunities in regard to mobilising supply chain and manufacturing for 'at scale' retro fit activity and testing market readiness.

## **4. Governance**

- 4.1. The Whole House Retrofit Pilot project will be an integral part of the City Housing Transformation Programme which comprises a portfolio of projects for the delivery of the City Housing vision.
- 4.2. The Whole House Retrofit Pilot project will be a core component of the Housing Management / Capital Investment and Repairs Transformation Programme.
- 4.3. The project will be managed in accordance with BCC corporate projects and programmes methodology, as agreed with the Housing Transformation Programme and corporate PMO.

- 4.4. It is intended that the Pilot will be delivered by BCC's Strategic Housing Repairs and Maintenance Partner. The Whole House Retrofit Pilot project organisation and reporting structure is illustrated in the appended Business Case.

## **5. Options considered and recommended proposal**

- 5.1. The Government's Net Zero Strategy (2021) and Heat & Buildings Strategy (2021) both reiterated the Government's commitment to ensuring "as many homes as possible" achieve an energy performance certificate (EPC) rating of C by 2035. On social housing, the intent is to "consider setting a long-term regulatory standard" to raise it up to a minimum of EPC band C. Achieving EPC C should be considered as the minimum long-term standard the City should set for its housing stock. With the City's aim to be carbon neutral by 2030 the ambition for the City's housing stock needs to be set substantially higher.
- 5.2. Undertaking a programme of works to transition a property to EPC C often involves significant external fabric interventions. Improving a property to EPC B or A rated additionally involves changing the energy source from gas to a carbon neutral or 'net zero ready' energy supply such as Air Source Heat Pump, importantly the Government anticipates full decarbonisation of the electricity grid by 2035. This means all heating and energy derived from electricity will be carbon neutral.
- 5.3. A whole house retrofit Pilot of 300 properties represents a significant programme of work and affords the City with the opportunity to explore how upgrading and improving properties can:
- Reduce resident fuel poverty.
  - Improve resident health and wellbeing.
  - Deliver local jobs, apprenticeships and increased green economy skills.
  - Contribute to a reduction in the City's carbon footprint.
  - Be delivered at pace using new and innovative technologies.
  - Fit within budgetary constraints and be affordable.
- 5.4. The Pilot has considered three options. Two of the options include delivering the Pilot using the existing contractual arrangements for commissioning capital works; and the third option involves using the Energiesprong innovative approach to delivering whole house retrofit. These options are summarised below:
- 5.4.1 Option 1: EPC C - This option would progress retrofit based on the existing contractual approach to repairs and maintenance.
- 5.4.2 Option 2: EPC B+ - This option would deliver enhanced retrofit measures through existing contractual arrangements. This option includes the integration of a carbon neutral energy system comprising an Air Source Heat Pump (ASHP), Photo Voltaic (PV) solar panels and a battery energy storage arrangement.
- 5.4.3 Option 3: EPC A - This option would seek to pilot the innovative, whole house Energiesprong approach to retrofit and financing. This is an emerging, innovative

approach to undertaking whole house retrofit and is distinguished by the partnering guarantee arrangements put in place between the landlord, solution provider and resident. This option includes a whole house approach, including a new roof cartridge with integrated PV replacing gas heating with a carbon neutral energy system comprising an ASHP, PV solar panels and a battery energy storage arrangement. The pilot would be delivered using the Fusion 21 Decarbonisation procurement framework.

5.4.4 The three options are summarised in greater detail in the attached Business Case.

### Preferred Option

5.5 The options have been assessed against a common set of evaluation criteria including critical success factors, risks & issues, social & economic values (including CO2 savings) and delivered cost. This is detailed within the attached business case.

5.6 The options assessment included options assessors individually scoring each of options 1, 2 and 3 (and a Do-Nothing option) as either High, Medium or Low against the identified criteria. The assessment scores were presented back in anonymised form for group evaluation and moderation. The results of the options assessment are summarized below:

Categories	Score				Weighted Score			
	Do nothing	Option1 EPC C	Option 2 EPC B+	Option 3 EPC A	Do nothing	Option1 EPC C	Option 2 EPC B+	Option 3 EPC A
Critical Success	80	100	420	480	24	30	126	144
Risks & Issues	630	600	340	250	63	60	34	25
Social & Economic	60	80	240	360	12	16	48	72
Delivered Cost	60	60	30	10	24	24	12	4
	830	840	1,030	1,100	123	130	220	245

5.7 The options assessment scores rank option 3 the highest, closely followed by option 2. option 1 and the option to do-nothing both attracted very low scores.

5.8 Option 3 was assessed most highly in the categories of BCC's critical success factors and social & economic value. However, as an innovative and new approach to whole house retrofit it was also assessed to be a higher risk option and to have a much higher cost – as evidenced by the low scores relative to option 1 and 2.

5.9 Option 3 additionally incorporates a high level of digital<sup>5</sup> enablement and monitoring of the WHR solution components including temperatures, energy consumption, air flow and ventilation. This supports the tenant to better monitor and manage their living environment and will, via IoT<sup>6</sup>, enable BCC to receive up-to-date information on the internal environment, condition and performance of key

<sup>5</sup> Birmingham Digital City Programme Digital Sustainability Business Case December 16, 2021

<sup>6</sup> IoT Internet of things describes physical objects with sensors, processing ability, software, and other technologies that connect and exchange data with other devices and systems over the Internet

solution components to support tenant health and wellbeing and also support proactive asset management and maintenance. This directly supports the Digital City - digital sustainability proposal that sets out the opportunities and benefits for including the digital capabilities.

- 5.10 Based on the detailed option appraisal undertaken by the Project Team it is proposed that the Whole House Retrofit Pilot is progressed using option 2 and option 3. The proposal is that the approach proposed by option 2 is applied to approximately 174 low-rise flats and option 3 is applied to approximately 126 cross-wall properties. This will provide BCC with a robust case for impact assessment for two solutions, support the BCC ambition to evaluate and apply innovative solutions and ensure that BCC take a prudent approach to managing costs and risks.

## **6 Consultation**

- 6.1 Capital Board has been consulted with regards to the capital investment.
- 6.2 The following Cabinet Members have been consulted and are supportive of the proposed approach. The Leader, Cabinet Member Environment (and Ward Member) and the Bromford and Hodge Hill Ward Member have been consulted on this report and approve of the recommended approach (appendix 6).

## **7 Risk Management**

- 7.1 Risks as detailed in the appended business case will be managed at the project level by the Project Manager for the Pilot, reporting to the City Housing Transformation Programme Board.
- 7.2 Risk management methodology will follow the City Council's standard approach as agreed with the Corporate PMO.

## **8 Compliance Issues**

- 8.1 **How are the recommended decisions consistent with the City Council's priorities, plans and strategies?**

The proposals within this report will make a direct contribution to both Corporate and Directorate outcomes, and is an example of Birmingham taking a Bold approach, specifically it supports the Council plan priorities:

- Birmingham is a great, clean and green city to live in;
  - Birmingham is a city that takes a leading role in tackling climate change.
- It will contribute directly to the Councils route to net zero priority

### **8.2 Legal Implications**

- 8.2.1 The proposed allocation of work is consistent with the effective management of the Council's housing stock under Part II Housing Act 1985.



8.2.2 Under S.111 Local Government Act 1972 the Council has power to do anything which is calculated to facilitate, or is conducive or incidental to, the discharge of any of their functions.

### 8.3 Financial Implications. Overview of cost per option, grant contributions, tenant benefits

8.3.1 Initiatives to increase thermal efficiency and reduce carbon emissions from the Council's housing stock are driven by non-financial objectives, with the Council having recognised a climate emergency in 2019, internal ambitions to reach carbon neutrality by 2030, legislation requiring minimum EPC-C ratings on Council housing stock by 2025, and economically driven objectives to reduce fuel poverty among Birmingham residents as energy costs increase. It is currently estimated that applying measures to the entire stock would cost around £3bn.

8.3.2 As such the pilot scheme is intended to make a step towards these ambitions while allowing the Council to apply an incremental learning approach to works, incorporate future technology when available, and begin the route to zero work on Council stock without committing the Council to unaffordable levels of borrowing.

8.3.3 Alongside the retrofit pilot detailed in this paper, the HRA has a budget built into the 10-year plan for redevelopment, between £40m-£80m per annum. The pilot, funded from the Housing Improvement budget within the HRA, is to trial retrofit on 300 properties in order to open up funding opportunities, find efficiencies in technology and process, and stimulate the market towards retrofit, so that a mix of retrofit and rebuild can be used to meet the carbon reduction targets on the entire Council stock over the longer term.

8.3.4 The table in 8.3.5 highlights that the recommended option will cost £25.986m capital and £2.203m revenue over 30 years. This has been increased by 5% to cover assumptions in the modelling and fluctuations in timing and costs. The differences between this option and the other options are reduced by grants, energy tariff exports and the opportunity for introducing a comfort plan, as detailed in 8.3.7.

8.3.5

30 year undiscounted cost £m	Option 1 EPC-C	Option 2 EPC-B+	Option 3 EPC-A	Option 4 EPC-B+/EPC-A
Capital cost	15.345	23.592	29.681	25.986
Revenue cost	1.356	1.479	3.203	2.203
Optimism bias 5%	0.835	1.253	1.644	1.409
Total Cost	17.536	26.324	34.528	29.598

8.3.6 The recommended option is detailed in the table in 8.3.7. It shows that with £18.064m already built into the HRA investment plan, there remains further pressures on the capital investment budget. These can be reduced, if not mitigated, by

- i) applications for grants to fund the works, such as Social Housing Decarbonisation Funding (SHDF) to be released in September 2022. This could contribute up to £12k per property if successful. Existing grant opportunities which have been, or will be, bid for could contribute up to £7.557m towards the cost.
- ii) the inclusion of the comfort plan is estimated to bring in £3.978m. It is proposed to develop and introduce the comfort plan during the 2 year pilot. The arrangements to administer and manage the comfort plan contribution will be developed and trialled during the initial solution rollout. The comfort plan is based on the premise of making a charge to tenants so that they, and the Council, share the benefit of energy cost savings resulting from the retrofit as a contribution towards the cost of investing in retrofitting more stock and the wider scaling of WHR.

Cabinet is asked to note that if these bids are unsuccessful, or the comfort plan not introduced, along with any shortfall in these funding streams, then further borrowing will need to be undertaken from the HRA, or further use of Right-to-Buy reserves, up to the value of £11.535m, with the impact of reducing the amount which can be invested in other initiatives outside of carbon reduction.

### 8.3.7 The recommended option is detailed in the table below:

£m	Year 0	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Future Years	Total
Capital	0.000	10.484	10.484	0.000	0.000	0.000	0.000	5.018	25.986
Revenue	0.177	0.164	0.046	0.095	0.046	0.062	0.095	1.519	2.203
Optimism Bias	0.009	0.532	0.526	0.005	0.002	0.003	0.005	0.327	1.409
<b>Total</b>	<b>0.186</b>	<b>11.181</b>	<b>11.056</b>	<b>0.099</b>	<b>0.048</b>	<b>0.065</b>	<b>0.099</b>	<b>6.864</b>	<b>29.599</b>
<b>Funded by:</b>									
PV Export Tariff	0.000	-0.022	-0.022	-0.022	-0.022	-0.022	-0.022	-0.531	-0.664
Renewable Heat Grant	0.000	-0.500	-2.000	0.000	0.000	0.000	0.000	0.000	-2.500
Right to buy receipt		-3.900							-3.900
Planned HRA Borrowing		-2.640	-8.360						-11.000
<b>Funding to be underwritten by HRA borrowing</b>	<b>0.186</b>	<b>4.119</b>	<b>0.674</b>	<b>0.077</b>	<b>0.026</b>	<b>0.043</b>	<b>0.077</b>	<b>6.333</b>	<b>11.535</b>
Comfort Plan	0.000	-0.133	-0.133	-0.133	-0.133	-0.133	-0.133	-3.182	-3.978
Further grant funding sought		-4.557	-3.000						-7.557

The supply and installation of energy savings materials is liable to VAT at the standard rate of 20%. As the provision of residential accommodation through Birmingham's HRA is a non-business activity for VAT purposes, Birmingham City Council can reclaim VAT on the installation of energy saving materials within HRA residential properties. As such, VAT should not be a cost to the project.

## 8.4 Procurement Implications

- 8.4.1 To support the development of the procurement strategy, Corporate Procurement engaged the services of Local Partnerships, who are jointly owned by the Local Government Association, HM Treasury and the Welsh Government. Local Partnerships have a wealth of experience in public sector procurement and in particular, the housing and retrofit category areas.
- 8.4.2 Corporate Procurement supported by Local Partnerships, have undertaken a detailed market review of procurement options available for the delivery of retrofit

within social housing. Specifically, the options available to deliver EPC B+ and EPC A, as required for testing during the pilot phase.

- 8.4.3 This process identified 33 frameworks/ Dynamic Purchasing Systems (DPS) that exist to support the delivery of domestic retrofit. To appraise these options in more detail, further desktop research and engagement with owners of the Frameworks and DPS has been undertaken to assess the suitability of their agreements. After due consideration 10 frameworks were shortlisted for further review.
- 8.4.4 As more than one route can be adopted to achieve BCC's aims and the requirements of the pilot, Corporate Procurement & Local Partnerships developed detailed assessment criteria, against which to assess the suitability of the shortlisted Frameworks and DPSs, as well as the Council's own in house contract provisions in this area.
- 8.4.5 The Procurement Strategy (Appendix 3) sets out the detailed review and options appraisal process adopted by Corporate Procurement in order to evaluate all available options to support the delivery of the WHR Pilot. This detailed assessment, identified the procurement routes below as the most appropriate for this pilot:
- EPC B+: The Council's current contract for the provision of R&M, Gas Servicing and Capital Improvement Works Programmes.
  - EPC A/Energiesprong: Greater London Authority: Retrofit Accelerator Homes Innovation Partnership (RAHIP).
- 8.4.6 Since completion of the Business Case in April 2022, it has not proved possible to contract with Equans via the RAHIP procurement framework which was identified as the recommended route. The benefit of contracting with Equans is that they are one of the Council's current Housing Repairs and Maintenance contractors and are recommended to undertake the EPC B+ work, therefore there are efficiencies to having the same contractor engaged on both retrofit solutions. As Equans can be directly engaged through the Fusion 21 Decarbonisation Framework, which was the second ranked procurement route, it is therefore recommended that the EPC A/Energiesprong solution is commissioned via the Fusion 21 Decarbonisation Framework Lot 1: Whole House Decarbonisation.
- 8.4.7 Additional information to support the Procurement Implications and Strategy is contained in Appendix 3.

## 8.5 **Public Sector Equality Duty**

Regarding section 149 of the Equality Act 2010, the proposed operating model has no practices that could be considered unfair, unlawful or discriminatory within this context. The Equality Assessment (EA) that reflects the changes of this proposal will be monitored and re-evaluated at the end of consultation.

## 9 **Background Documents**

None

## **10 Appendices**

Appendix 1 – Enhanced Business Case

Appendix 2 – Equality Assessment

Appendix 3 – Procurement Strategy

Appendix 4 – The Comfort Plan explained

Appendix 5 – The Energiesprong model explained

Appendix 6 – Ward Councillors Consultation Matrix





# ENHANCED BUSINESS CASE

## *WHOLE HOUSE RETROFIT PILOT*

### HOUSING TRANSFORMATION PROGRAMME

**AUTHOR(S):** Steve Wilson, City Housing Director  
Guy Chaundy, City Housing Senior Manager Strategy



## Document Control

<b>Document title</b>	Enhanced Business Case – Whole House Retrofit Pilot		
<b>Voyager Code</b>			
<b>Programme Sponsor</b>	Julie Griffin, MD, City Housing Steve Wilson, City Housing Director		
<b>Programme Manager</b>	Guy Chaundy		
<b>Finance Business Partner</b>	Andrew Healey		
<b>Version number</b>	1.0	<b>Document owner</b>	Steve Wilson Guy Chaundy
<b>Date approved</b>		<b>Document status</b>	
<b>Effective date</b>		<b>Approved by (name and role)</b>	

Version	Author	Date	Summary of changes
1.0	Steve Wilson Guy Chaundy	04-07-2022	Final version reflecting changes arising from consideration of report at July Cabinet

## Contents

1	Section A – General Information.....	5
1.1	A1 - Programme Summary .....	5
1.2	A2 – Programme Scope .....	5
2	Section B – Strategic Case.....	7
2.1	B1 - Programme Investment Objectives and Outcomes.....	7
2.2	B2 - Programme Deliverables.....	11
2.3	B3 - Programme Benefits .....	11
2.4	B4 - Social Value Outcomes .....	12
2.5	B5 - Stakeholders .....	14
3	Section C - Economic Case and Options Appraisal .....	15
3.1	C1 - Summary of Options reviewed at OBC stage .....	15
3.2	C2 – Critical Success Factors.....	17
3.2.1	Evaluating Social & Economic Value.....	18
3.2.2	Overall findings: The preferred Option .....	23
3.2.3	Overall conclusions and recommendations .....	23
3.3	C3 - Risks and Issues .....	23
3.4	C4 – Other Impacts of the Preferred Option.....	<b>Error! Bookmark not defined.</b>
4	Section D – Commercial Case .....	25
4.1	D1 - Partnership, Joint venture and accountable body working.....	<b>Error! Bookmark not defined.</b>
4.2	D2 - Procurement implications and Contract Strategy .....	25
5	Section E – Financial Case .....	25
5.1	E1 - Impact on the organisation’s MTFP .....	25
5.2	E2 - Impact on the Council's balance sheet.....	27
5.3	E3 - Overall affordability.....	27
5.4	E4 – Approach to Optimism Bias and Provision of Contingency .....	28
5.5	E5 – Taxation .....	28
6	Section F – Management Case .....	30
6.1	F1 - Programme management arrangements .....	30
6.2	F2 - Programme management arrangements .....	31
6.2.1	Programme reporting structure .....	31
6.2.2	Programme roles and responsibilities.....	31
6.2.3	Programme plan.....	33
6.3	F3 - Use of special advisers .....	34
6.4	F4 - Arrangements for change management .....	34



6.5	F5 - Arrangements for benefits realisation.....	35
6.6	F6 - Arrangements for risk management .....	36
6.7	F7 – Arrangements for dependency management.....	36
6.8	F9 - Arrangements for contract management.....	36
6.9	F10 - Arrangements for post project evaluation.....	36
7	Section G – Supporting Information.....	<b>Error! Bookmark not defined.</b>

# 1 Section A – General Information

## 1.1 A1 - Programme Summary

The project will implement an innovative Whole House Retrofit (WHR) Pilot using two retrofit approaches; one to retrofit properties to achieve an Energy Performance Contracting (EPC) 'B+' rating and the second using the [Energiesprong](#)<sup>1</sup> (EPC 'A') approach to deliver carbon reduction for the city, economic growth and reduced energy costs, health and wellbeing benefits to residents.

The full pilot project will deliver WHR to 300 units of BCC social housing stock in East Birmingham; 174 properties to EPC B+ and 126 properties to EPC A (Energiesprong).

The WHR Pilot will retrofit 300 properties in East Birmingham:

- Phase 1 Design: May - August 2022
- Phase 2 Initial Solution Rollout: October 2022 – March 2023; 18<sup>2</sup> properties
- Phase 3 Wider Solution Rollout: December 2022 – March 2024; 282<sup>3</sup> properties
- Phase 4 Monitor and Review Pilot: Jan – March 2024
- Report to Cabinet on Pilot and Recommendations for scaling up to deliver a social housing retrofit programme: March/April 2024.

The Pilot will determine the scope for scaling more widely for BCC's suitable social housing stock c.60,000 properties.

The Pilot presents a bold and innovative opportunity to build on local, regional and national ambitions to reduce carbon emissions, deliver future-proofed retrofit for BCC's 'worst first' properties and address fuel poverty in East Birmingham<sup>4</sup> through improved performance and reduced energy bills. Critically the project directly advances local and national inclusive growth, levelling up and build back better objectives. Increased inclusivity of growth will be derived from place-based regeneration, focusing on 'worst-first' housing and 'green growth' through growing jobs, skills and the low carbon economy.

## 1.2 A2 – Programme Scope

The scope of the Whole House Retrofit Pilot is to retrofit and deliver 174 EPC B+ low rise flats using the existing 2022-2024 Capital programme Housing Repairs and Maintenance contractual arrangements with Equans, and 126 EPC A cross wall homes using the Energiesprong solution.

The low rise flats property retrofit will be delivered through engaging the services of BCC's Strategic Housing Repair Partner, (Equans) within the existing capital works CVP<sup>5</sup> arrangements – managing all elements of the pilot programme under a "one-stop-shop" arrangement. This

<sup>1</sup> Energiesprong is a whole house refurbishment and funding approach for social housing providers.

<sup>2</sup> 8 low rise flats and 10 cross wall properties

<sup>3</sup> 168 low rise flats and 116 cross wall properties

<sup>4</sup> Fuel poverty is a particular issue in the West Midlands, with 17.5% of households in fuel poverty, the highest of all regions and compared to 13.8% nationally; additionally the combined impacts of Brexit, COVID-19 and recent external market pressures have led to sharp increases in fuel prices, which in turn have led to energy prices increasing, and increased fuel poverty.

<sup>5</sup> Common Procurement Vocabulary

approach would see the ownership of the design, costing, supply chain engagement, mobilization, resident engagement, delivery handover and post works monitoring being undertaken by Equans..

The cross wall homes property retrofit will be delivered using the Retrofit Accelerator Homes – Innovation Partnership (RAHIP) Framework. The aspiration is that Equans will be appointed as the BCC RAHIP solution provider<sup>6</sup>. As the solution provider, Equans would be responsible for putting in place the supply chain and vendors necessary to deliver all elements from design through tenant engagement and delivery and handover. In addition, Energiesprong will be involved and will be responsible for facilitating access to emerging best practices, technical support, learnings from other pilots and the Collaboration Hub<sup>7</sup>.

---

<sup>6</sup> There are four solution providers registered on RAHIP, United Living, Osborne Group, MIDAS Group and Equans. Solution providers are matched to landlords via a carousel procedure. Landlords can provide justification to accept or decline matching.

<sup>7</sup> Collaboration Hub is a forum comprising all solution providers and landlords, hosted by Turner & Townsend to promote cross pilot learning targeted at driving costs down

## **2 Section B – Strategic Case**

**This sets out the case for change and the project's fit to the Council Plan objectives**

### **2.1 B1 - Programme Investment Objectives and Outcomes**

#### **Strategic Context**

There is an international, national and local strategic imperative to reduce carbon emissions and strenuous effort is being applied at all levels of government to determine how best to achieve net zero targets.

The Climate Change Act 2008 introduced a target for at least a 100% reduction of greenhouse gas emissions (compared to 1990 levels) in the UK by 2050. Domestic energy consumption accounts for about 30% of the UK's total energy budget, and 20% of UK greenhouse gas emissions. Reduction in carbon emissions from domestic properties is essential to achieve the goals of the 2008 Climate Change Act.

On 11 June 2019 the council declared a climate emergency and made the commitment to take action to reduce the city's carbon emissions and limit the climate crisis. The ambition was set for the council and city to become net zero carbon by 2030, or as soon as possible thereafter as a 'just transition' allows – ensuring we reduce inequalities in the city and bring our communities with us. This is the city's 'route to zero'.

On 25 June 2019 the council's Cabinet agreed to add a new priority to the Council Plan which states that Birmingham will be "a city that takes a leading role in tackling climate change". This commitment will embed climate action in the council's decision-making process to make sure that all service areas contribute to the "route to zero" journey.

On 12 January 2021 the Council approved its Route to Zero Action Plan. The document sets out the priority actions for the council in the short and medium term.

#### **Decarbonising Heat – Domestic Properties**

The Department for Business Energy Industrial Strategy (BEIS) released the 'Net Zero Strategy' and 'Heat and Buildings' Strategy in October 2021<sup>8</sup>. These Strategies set out how the UK will decarbonise homes and commercial, industrial and public sector buildings, as part of setting a path to net zero by 2050. The Government recognises that to upgrade domestic buildings will require a comprehensive package of measures to be implemented over the next decade. The BEIS 'Ten point plan' to achieve net zero includes plans to:

1. Phase out natural gas boilers by 2035.
2. Reduce the cost of installing heat pumps to ensure they are no more expensive to buy and run than gas boilers by 2035.
3. Improve heat pump technology by investment and research.
4. Ensure affordability by providing financial support to meet capital installation costs.
5. Rebalance prices so that heat pump running costs are no more expensive to install and run than conventional gas fired boilers.
6. Grow the supply chain for heat pumps to 2028.
7. Ensure all new buildings in England will be ready for Net Zero from 2025.

---

<sup>8</sup> [Heat and buildings strategy - GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/consultations/heat-and-buildings-strategy)



8. Phase out the installation of fossil fuel heating systems in properties not currently connected to the gas grid.
9. Grow UK manufactured technology and capabilities.
10. Ensuring the electricity system can accommodate increased demand and heat pumps can be quickly and affordably connected to the network.

The Government's commitment to build back greener is also set out in the Sustainable Warmth & Protecting Vulnerable Households in England Strategy (Feb 2021)<sup>9</sup> which outlines the updated fuel poverty strategy and sets out plans to:

- Invest a further £60 million to retrofit social housing and £150 million invested in the Home Upgrade Grant, contributing to the manifesto commitment to a £2.5 billion Home Upgrade Grant (HUG) over this Parliament.
- Invest in energy efficiency of households through the £2 billion Green Homes Grant (GHG), including up to £10,000 per low income household to install energy efficient and low carbon heating measures in their homes.
- Expand the Energy Company Obligation (ECO), a requirement for larger domestic energy suppliers to install heating, insulation or other energy efficiency measures in the homes of people who are low income and vulnerable or fuel poor. The scheme will be increased from £640m p.a. to £1bn p.a.
- Extend the Warm Home Discount a requirement for energy companies to provide a £140 rebate on the energy bill of low-income pensioners and other low income households with high energy bills, ensuring continuity for vulnerable or fuel poor consumers.
- Drive over £10 billion of investment in energy efficiency through regulatory obligations in the Private Rented Sector, and
- To lead the way in improved energy efficiency standards through the Future Homes Standard, and the Decent Homes Standard.

There are currently a number of housing policy and standards under review to support the Government's intention to move towards Net Zero:

- The Decent Homes Standard - The Charter for Social Housing Residents: Social Housing White Paper published on 17 November 2020 announced a review of the Decent Homes Standard to understand if it is right for the social housing sector today. The review will be conducted in two parts. Part 1 will run from Spring to Autumn 2021 and will seek to understand the case for change to criteria within the Decent Homes Standard. If the case for change is made, Part 2 will run from Autumn 2021 to Summer 2022 and will consider how decency should be defined.

The Department for Levelling Up Housing and Communities (DLUHC) anticipates the main outcome will be a refreshed Decent Homes Standard. It is widely understood that the minimum requirements for energy efficiency will be revised in support of a target minimum EPC 'C' rating by 2035.

- Energy Efficiency (Private Rented Property) (England and Wales) Regulations 2015 – These regulations are the minimum energy efficiency standard for private rented sector landlords. The consultation closed in December 2020. There is an express intention that all private homes meet EPC 'C' rating by 2025 for new tenancies and for all homes by 2028.

---

<sup>9</sup> [Sustainable warmth: protecting vulnerable households in England - GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/consultations/sustainable-warmth-protecting-vulnerable-households-in-england)

## **City Housing Vision & Whole House Retrofit**

City Housing wants to become “best in class”; to provide a responsive and sustainable service that is relentlessly reliable and builds trust by placing tenants and residents at the centre of what it does and by offering excellent customer service, ensuring tenant’s homes meet their needs and standards for now and the future.

A ‘whole-house’ retrofit is a set of interventions aimed at ensuring that a property operates in as energy-efficient a manner as possible, with all aspects of the building complementing each other in order to be as close to carbon-neutral as possible. In addition the potential wider economic opportunity is significant as the scale of retrofitting the council’s social housing stock is large. Investing in a programme of works provides a significant local skills and employment opportunity as part of a growing ‘green economy’.

BCC is one of the largest landlords in the UK. It is responsible for 15% of the total housing stock in the city, some 60,000 homes, with a mix of high- and low-rise flats, detached, semi-detached and terrace properties. BCC needs to improve the thermal efficiency of its housing stock to reduce carbon emissions, reduce energy bills, improve the quality and experience of residents and support a just transition to a zero carbon city.

BCC’s historic housing stock is a large net contributor to the city’s carbon emissions. The BEIS ‘City Decarbonisation of Heat-Delivery’, September 2020 reports that heat greenhouse gas emissions (GHG) account for c.48% (2,034 ktCO<sub>2</sub>e) of the council’s total annual emissions (4,251 ktCO<sub>2</sub>e), and that domestic properties account for 57% of heat emissions with an annual GHG footprint of c.1,159 ktCO<sub>2</sub>e. Tackling these heat emissions and achieving a ‘net zero’ position is key to BCC achieving its R20 commitment, the aim set for the council and city to become net zero carbon by 2030, or as soon as possible thereafter as a ‘just transition’ allows as .

## **Place-based, inclusive growth and levelling up in East Birmingham**

The project directly supports BCC’s levelling up strategy and inclusive growth objectives. The pilot will be focused in East Birmingham and will support place-based regeneration and development for one of the most deprived areas of the city. A key of element inclusive growth will be the delivery of the net zero transition and the most challenging element will be the delivery of energy efficient homes and low-carbon heating. The delivery of a heat retrofit is hence both a challenge but also an opportunity for regeneration.

East Birmingham is home to more than 230,000 people and forms a crucial part of the City of Birmingham and region’s economy. Major growth is anticipated which will deliver more than 60,000 new jobs and 10,000 homes within and near to East Birmingham over the next ten years. With the coming of HS2 and the proposed Midland Metro East Birmingham to Solihull extension, East Birmingham has significant development opportunities.

East Birmingham is a young place where a third of residents are under 16 years old - one of the highest proportions of children in the country. For many of the citizens of that part of the city there are multiple levels of deprivation and high levels of unemployment. For example, the claimant rate in the Birmingham Hodge Hill constituency is 14.1%, roughly one in seven, the highest rate of any constituency in the UK. As of February 2021, there were 11,045 people searching for a job in Hodge Hill. To support the region’s development, BCC has created the East Birmingham Inclusive Growth Strategy<sup>10</sup>.

---

<sup>10</sup> <https://www.birmingham.gov.uk/ebigs>

The Council presented its 'Prosperity and Opportunity for All': Birmingham City Council's levelling up strategy to Government at the end of November 2021. The Council and its partners in East Birmingham want to work with the Government to define and implement a programme that will accelerate progress to level up East Birmingham by delivering the critical changes needed to tackle inequalities. East Birmingham provides an ideal test bed for developing and delivering successful new approaches to levelling up. It represents a prime opportunity to pilot an integrated programme of transformational interventions so that the lessons can benefit not only the rest of Birmingham but also other parts of the UK. A core principle of the strategy, in common with the East Birmingham Inclusive Growth Strategy, is a focus on linking expected and planned growth with communities to deliver inclusive growth. Five 'levelling up accelerators', including scale housing retrofit, have been identified to use the impetus created by major investments such as HS2 and Birmingham Smithfield to make a real difference.

BCC, Coventry City Council and Wolverhampton City Council have established a Three Cities Retrofit Programme which aims to:

- Accelerate the path to net zero through reduction of housing emissions
- Support the levelling up housing stock and improving standards
- Reduce the costs of housing maintenance and energy use
- Address fuel poverty
- Enable an uplift of skills and developing job opportunities
- Develop an at scale supply chain including manufacturing of kit for the retrofit
- Maximise the benefit of investment to connect with wider policy areas such as digital and energy transformation and EV connections for homes.

The BCC WHR Pilot is directly aligned to and will contribute to the wider three cities alliance.

*The investment objectives and outcomes for this project are as follows:*

Objectives	Outcomes
To deliver a 300 home Whole House Retrofit (WHR) pilot which supports the reduction of carbon emissions in line with the Council's net zero targets.	Carbon emission savings
To deliver a 300 home WHR pilot which improves and supports the maintenance and future proofing of asset value/stock condition; providing high quality homes that are fit for the future.	300 minimum EPC 'B+' rated homes
To deliver a 300 home WHR pilot which supports work relating to fuel poverty and the negative health effects of energy inefficient dwellings.	Energy savings and bill reduction
To deliver a 300 home WHR pilot which demonstrates an acceptable return on investment in terms of net risk adjusted social value and payback period.	Social value outcomes: <ul style="list-style-type: none"> <li>• More local employment</li> <li>• More local training</li> <li>• No. of apprenticeships</li> </ul>
To attract public and private sector inward investment.	£ public sector funding £ private sector funding
To assess two approaches to WHR with reference to CO2 performance, tenant experience and the potential to support scaling across BCC social housing stock.	An assessment of the Pilot and recommendations for scaling

## 2.2 B2 - Programme Deliverables

Please list expected deliverables / outputs and include any timelines you expect them to be delivered, if not known please use TBC

Deliverable	Expected Timeline
<ul style="list-style-type: none"> <li>Report to Cabinet</li> </ul>	<ul style="list-style-type: none"> <li>July 2022</li> </ul>
<ul style="list-style-type: none"> <li>Programme team in place</li> </ul>	<ul style="list-style-type: none"> <li>July 2022</li> </ul>
<ul style="list-style-type: none"> <li>Phase 1: Solution Design</li> </ul>	<ul style="list-style-type: none"> <li>August 2022</li> </ul>
<ul style="list-style-type: none"> <li>Phase 2: Initial Solution Rollout</li> </ul>	<ul style="list-style-type: none"> <li>October 2022 – March 2023</li> </ul>
<ul style="list-style-type: none"> <li>Interim Progress Report to Cabinet on Pilot</li> </ul>	<ul style="list-style-type: none"> <li>March/April 2023</li> </ul>
<ul style="list-style-type: none"> <li>Phase 3: Wider Solution Rollout</li> </ul>	<ul style="list-style-type: none"> <li>Dec 2023 – March 2024</li> </ul>
<ul style="list-style-type: none"> <li>Phase 4: Monitor &amp; Review Pilot</li> </ul>	<ul style="list-style-type: none"> <li>Jan – March 2024</li> </ul>
<ul style="list-style-type: none"> <li>Report to Cabinet on Pilot and Recommendations for Scaling</li> </ul>	<ul style="list-style-type: none"> <li>March/April 2024</li> </ul>

## 2.3 B3 - Programme Benefits

Benefit	Impact	Measure
<ul style="list-style-type: none"> <li>300 minimum EPC 'B+' rated homes</li> </ul>	<ul style="list-style-type: none"> <li>Reduced CO2e</li> </ul>	<ul style="list-style-type: none"> <li>Reduced Carbon emissions</li> <li>174 units EPC B+</li> <li>126 units EPC A</li> </ul>
<ul style="list-style-type: none"> <li>Reduced fuel poverty</li> </ul>	<ul style="list-style-type: none"> <li>Energy bill reduction per property</li> <li>Energy savings per property</li> </ul>	<ul style="list-style-type: none"> <li>Households lifted out of fuel poverty</li> </ul>
<ul style="list-style-type: none"> <li>Improved health of social housing residents by removing Housing Health and Safety Rating System (HHSRS) category one hazards.</li> </ul>	<ul style="list-style-type: none"> <li>Reduced #s cold homes &amp; impact on vulnerable residents (e.g. excess cold, damp and mould, slips trips and falls) to provide warm, damp free homes</li> <li>Reduced sickness days</li> <li>Improved life chances for children (having a warm home environment has a direct link to higher academic achievement).</li> </ul>	<ul style="list-style-type: none"> <li>Achievement of performance management targets</li> <li># people in fuel poverty assisted with energy efficiency measures</li> <li>HHSRS<sup>11</sup> and, Decent Homes<sup>12</sup> property assessments</li> <li># people benefitting from housing retrofit programme</li> <li>Subjective wellbeing metrics (anxiety, safety, control, happiness, satisfaction etc)</li> </ul>

<sup>11</sup> [Housing health and safety rating system \(HHSRS\) guidance - GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/publications/housing-health-and-safety-rating-system-hhsrs-guidance)

<sup>12</sup> [Decent homes programme funding: equality impact assessment - GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/publications/decent-homes-programme-funding-equality-impact-assessment)



Benefit	Impact	Measure
<ul style="list-style-type: none"> <li>Socio-economic benefits</li> </ul>	<ul style="list-style-type: none"> <li>Jobs</li> <li>Skills</li> <li>Low Carbon economy</li> </ul>	<ul style="list-style-type: none"> <li>More local employment: # direct/indirect jobs</li> <li>More local training: #s people benefitting from skills training; #apprenticeships</li> </ul>
<ul style="list-style-type: none"> <li>Inward investment</li> </ul>	<ul style="list-style-type: none"> <li>Investment (beyond current budgets) to achieve reduction in carbon emissions.</li> </ul>	<ul style="list-style-type: none"> <li>Funding secured £</li> </ul>

## 2.4 B4 - Social Value Outcomes

The social value outcomes expected to be achieved as a result of the project are in accordance with BCC's Social Value Policy and the Birmingham Business Charter for Social Responsibility<sup>13</sup>. The scale of the Council's stock ownership is large (c. 60,000 homes); the delivery of the Whole House Retrofit Pilot presents a material opportunity for BCC to progress towards its net zero carbon ambitions, and to make a significant contribution to economic recovery and growth through employment and skills opportunities for local businesses and the local community, in addition to creating a healthy community supporting a just transition.

Six key measures of social and economic value drawn from the Birmingham Business Charter for Social Responsibility (BBC4SR) have been identified for the Pilot; these are outlined in more detail on the Economic Case:

- Number of properties transitioned to higher EPC
- tCO2e saved
- More local employment
- More local training
- Number of apprenticeships
- Fuel poverty reduction / saving to tenants

**Reduced Carbon** - Tackling carbon emissions is key to BCC achieving its net zero carbon objectives. BCC social housing stock accounts for circa 15% of the city's total heat GHG emissions. The WHR Pilot provides an opportunity to consider the potential to develop a scale programme over the next 30 years to support Birmingham achieve net zero. The WHR Pilot also provides an opportunity to lobby externally to (a) attract public central government and WMCA funding (b) engage with private sector investment to secure support for an investable, scale retrofit programme (c) position Birmingham at the vanguard of the zero-carbon retrofit agenda.

**More local skills and employment opportunities** - Nationally CITB indicates a need for 230,000 (existing and new) construction workers trained in retrofit skills by 2030 and The Heat Pump Association is forecasting demand for 35,000 trained installers (level 2 – 4) by 2028 to meet national net zero targets. Additionally, in the West Midlands nearly one in three (28.3%) of the 125,000 construction workers are over 50 years old – highlighting ongoing pressure for labour replacement. Plus, research suggests that around 30% of construction workers (some 37,500 in the West Midlands) will need retraining / updated skills to meet the transition to green skills. Specific skills demand will vary by method and approach to retrofit. The more traditional,

<sup>13</sup> [https://www.birmingham.gov.uk/info/50209/birmingham\\_business\\_charter\\_for\\_social\\_responsibility/1828/the\\_charter\\_and\\_policies](https://www.birmingham.gov.uk/info/50209/birmingham_business_charter_for_social_responsibility/1828/the_charter_and_policies)

incremental approach has an established set of qualification pathways whilst more radical approaches are likely to use a high level of off-site design, production and assembly requiring a different combination of skills such as digital design, heat and energy appraisal, quality control, project and programme management. Due to the immaturity of the retrofit market and corresponding provision within the training and skills system an iterative approach is needed to improve skills match. In the short term a dual approach to short course updating of trained construction workers in key retrofit skill areas combined with adaptation of existing vocational training curriculum will be necessary until the market and demand are more established. For example, BCC can look to engage HEIs and FEIs such as South & City College Birmingham - for construction and Birmingham City University – for graphic and digital design; to develop curriculum to incorporate the new skills which will be in demand.

**Economic growth** - The upper limit to retrofit all of BCC housing stock to a net zero standard is estimated to be circa £3.6bn. Over 30 years, a total spend of around £100m per year on retrofit creates a significant market. With prudent procurement activity this could stimulate market development in the local manufacture, supply and installation of retrofit products and services that range from PV and heat pump equipment through to insulation materials, roofing and glazing. Additionally, the demand could also provide a positive incentive for regional innovation in product design, manufacture and installation, providing a boost to the regional low carbon and energy sector in BCC and across the West Midlands. The design of energy and heat management technologies and decarbonisation methods complement existing capacity within the higher education and sector specialisms and existing engagement at a regional level by the innovation agencies (including the Local Economic Partnership (LEP) and Energy Systems Catapult). The urgency of net zero targets and the scale of works means rapid development of capacity and technology is needed for the manufacture and offsite assembly of retrofit products and capacity for effective installation design – including 3D mapping and quality management. The gaps in capacity and capability across the UK supply chain for retrofit is a major barrier to widespread and accelerated adoption. As the manufacturing heartland of the UK and in combination with world leading, Higher Education (HE) institutions including University of Birmingham and Aston University, BCC is ideally placed to initiate economic growth through leadership and promoting a scale programme. Through addressing the social housing stock, BCC, in combination with an advanced local supply capability, will be well placed to promote and encourage the retrofitting activities of privately owned residences and target addressing 20% of the city's heat GHG emissions.

**Creating a healthier community** - The Council's climate emergency commitment is for the Council and city to become net zero carbon by 2030, or as soon as possible thereafter, as part of a just transition, to deliver the inclusive, clean growth and jobs that are needed to sustain the city's economy. The Whole House Retrofit programme will help to support a 'just' transition through assisting tenants who may be in fuel poverty; the current energy crisis is increasingly highlighting the position to vulnerable households across Birmingham. The Whole House Retrofit programme can also assist in improving the health and wellbeing of vulnerable residents, for example the health benefits associated with reducing the number of homes subject to excess cold and damp and mould; BRE: Housing Health Cost Calculator (HHCC) / Excess Cold Calculator (XCC)<sup>14</sup> provides an indication of the cost of poor housing attributed to HHSRS Category 1 outcomes.

<sup>14</sup> BRE: Housing Health Cost Calculator ([aleo.org.uk](http://aleo.org.uk))

## 2.5 B5 - Stakeholders

- Birmingham City Council – City Housing, Inclusive Growth, Public Health, Private Rental Services Team, City Operations, Members
- Private Landlords
- Land Owners – e.g Calthorpe Estate
- Residents / Tenants
- WMCA
- GBSLEP
- Government
- Businesses
- Energiesprong
- FE, HE, training providers
- Private sector investors / finance organisations

### 3 Section C - Economic Case and Options Appraisal

This section sets out the Options that have been considered to determine the best value for money in achieving the Council's priorities

#### 3.1 C1 - Summary of Options reviewed at OBC stage

The scope of the Whole House Retrofit Pilot is for 300 properties of two archetypes, cross wall houses and low-rise flats. Combined, these two archetypes comprise between 35-40% of the non-high rise BCC social housing stock. It is expected that the findings and outcomes of the pilot will play a significant role in contributing to the direction and approach adopted in BCC's longer-term housing strategy to decarbonize the housing stock and improve resident health and wellbeing.

To support BCC's aim to achieve net zero carbon by 2030, resident wellbeing and meet the longer-term statutory requirement that all social housing achieve EPC 'C' at a minimum by 2035 this business case has considered three options which are summarized in the table below:

Option	Description & Scope of Works	Approach
Option 1: To achieve EPC C for 300 homes <sup>15</sup>	<p>Business as Usual Approach to Retrofit. This option would progress retrofit based on a 'traditional' approach to repairs and maintenance in support of a target minimum EPC 'C' rating by 2035.</p> <p>The retrofit measures include:</p> <ul style="list-style-type: none"> <li>• Cavity Wall Insulation and/or External Wall Insulation</li> <li>• Double Glazed Windows</li> <li>• Energy Efficient Doors</li> <li>• 300mm Loft Insulation</li> <li>• Ventilation</li> <li>• Basic Draught Proofing</li> <li>• A-Rated Boiler (Incl Heating Distribution and Rads)</li> </ul>	<ul style="list-style-type: none"> <li>• The pilot will be delivered by BCC's strategic R&amp;M vendor Equans, in line with the existing contractual arrangements for commissioning capital works.</li> <li>• Where the full range of interventions is required, the works are estimated to take 3-4 weeks to complete.</li> <li>• This option has the least impact on existing BCC resources and costs. The focus of efforts remains on operating within current budget constraints with limited impact on reducing the carbon footprint of BCC's social housing stock and requiring no changes to the delivery organisation within City Housing.</li> </ul>
Option 2: To achieve EPC B+ for 300 homes	<p>Business as Usual Retrofit Plus. This option would seek to extend the scope of retrofit measures offered based on a 'traditional' approach to repairs and maintenance in support of a target minimum Energy Performance Certificate (EPC) B rating by 2035</p> <p>The retrofit measures include:</p> <ul style="list-style-type: none"> <li>• 150mm External Wall Insulation</li> <li>• Triple Glazed Windows</li> <li>• Energy Efficient Doors</li> <li>• 400mm Loft Insulation</li> <li>• Ventilation</li> </ul>	<ul style="list-style-type: none"> <li>• The pilot will be delivered by BCC's strategic R&amp;M vendor Equans, in line with the existing contractual arrangements for commissioning capital works.</li> <li>• Where the full range of interventions is required, the works are estimated to take 7-8 weeks to complete.</li> <li>• This option would develop interventions targeted at uplifting the EPC rating to 'B+'. The</li> </ul>

<sup>15</sup> For each Option two archetypes covering four variants; Cross wall houses (end and mid terrace), Low rise flats (top and ground floor).



	<ul style="list-style-type: none"> <li>• Air Tightness Works</li> <li>• Air Source Heat Pump (Incl Heating Distribution and Rads)</li> <li>• Solar PV and Battery Storage</li> <li>• De-gas properties and replacement cookers</li> </ul>	<p>approach and retrofit measures include changing the energy source to an air source heat pump combined with solar PV - it represents the 'enhanced business as usual retrofit plus' approach.</p>
<p>Option 3: To achieve EPC A for 300 homes</p>	<p>This option would seek to pilot and scale the innovative, whole house Energiesprong approach to retrofit and financing in support of a target minimum EPC 'A' rating</p> <p>The retrofit measures include:</p> <ul style="list-style-type: none"> <li>• External Wall Insulation, offsite manufactured panels</li> <li>• Double / triple Glazed Windows and doors</li> <li>• Improved loft insulation/new insulated roof</li> <li>• Under-floor insulation or below DPC perimeter insulation</li> <li>• Active Ventilation</li> <li>• Mechanical &amp; Electrical "pod" inc. Air Source Heat Pump, Battery/immersion diverter, hot water tank</li> <li>• Solar PV 4-6 kWp</li> <li>• Digital technical performance monitoring</li> </ul>	<ul style="list-style-type: none"> <li>• The aim is for the pilot to be commissioned via RAHIP<sup>16</sup> (BCC's strategic R&amp;M vendor Equans is one of four providers on that framework and the aspiration is that Equans could deliver the pilot).</li> <li>• Through using RAHIP, the contractual target is to complete the full range of interventions in 10-15 days.</li> <li>• With this option the implementation of retrofit (net zero) measures would include changing the energy source to a low or zero carbon solution such as individual or community air or ground source heat pump combined with solar PV. This has the advantage of a stepped reduction in CO2 emissions and additionally supports generating market demand for emerging technologies and for new (installation) skills</li> </ul>

All three options involve significant fabric components. Options 2 and 3 additionally involve internal interventions. BCC will work with the delivery partner(s) to develop a resident (and stakeholder) engagement plan to ensure that the transition is managed in partnership with the residents.

Options 2 and 3 represent two different routes and solutions to achieving a near to zero carbon footprint. In addition to the high fabric technical performance specification, these options include the integration of a carbon neutral energy system comprising an air source heat pump (ASHP), photovoltaic (PV) solar panels and a storage battery arrangement. BCC will work with the delivery partner(s) to provide awareness, education and training to residents in using the new solution components. Details of the approach to resident engagement and resident training are outlined in the Management Case.

### Delivering the Pilot

Options 1 and 2 can be delivered within the scope of BCC's existing Capital Works arrangements with Equans. Engaging the services of Equans as the managing contractor will result in all

<sup>16</sup> Retrofit Accelerator Homes – Innovation Partnership (RAHIP) Framework

elements of the pilot programme being managed under a “one-stop-shop” arrangement. This approach would see the ownership of the design, costing, supply chain engagement, mobilization, resident engagement, delivery handover and post works monitoring being undertaken by the managing contractor. More detail on the existing arrangements is outlined in the Commercial Case.

Option 3 would be delivered using the Energiesprong<sup>17</sup> Net Zero Energy (NZE) approach to retrofit via RAHIP. This is an emerging, innovative approach to undertaking whole house retrofit and is distinguished by the partnering guarantee arrangements put in place between the landlord, solution provider and resident:

- a. The Performance Management Framework – a guarantee by the solution provider to the resident of a minimum level ‘Comfort Plan’ of hot water, heating and electricity for an agreed level of energy consumption.
- b. Comfort Plan – a household ‘Comfort Plan’, an agreement between BCC and the tenant which establishes a kWh/year consumption<sup>18</sup> and comfort charge for guaranteed ‘comfort’ outcomes – delivering warm rooms every day, enough daily hot water for household use, and enough power for normal use of plugs, appliances and lighting. The comfort charge is an amount charged by BCC to the tenant representing a share of the savings made / costs avoided by the tenant. This provides a contribution to BCC which will support the wider scaling of WHR across the housing stock
- c. Performance Guarantee –the solution provider guarantees:
  - Planned maintenance costs of the retrofit improvement works over 10 years
  - Equipment replacement cycles and costs over 10 years
  - Energy performance (kW) over 10 years assuming the residents operate their homes within the agreed ES comfort plan.

This 10-year guarantee is backed up by the solution provider providing a fully costed maintenance plan with the landlord for 30 years.

The Energiesprong approach incentivises maximising the use of modern methods of construction such as off-site construction to reduce time and disruption on site, and to build the supply chain capability to deliver solutions that will support developing scalable and sustainable solutions to retrofit and providing wider green economy opportunities.

### 3.2 C2 – Critical Success Factors

The Critical Success Factors (CSFs) for this programme are as follows. These CSFs have been used alongside the investment objectives for the project to evaluate the possible Options.

<sup>17</sup> An overview of Energiesprong approach to WHR can be found in Appendix XYZ

<sup>18</sup> The charge is based on an agreed baseline energy price. Consumption by the resident above the agreed allowance is payable by the resident to the utility provider. Significant changes in the price of energy are paid for by the resident.

Desired Outcome	Critical Success Factor(s)
<b>Business Needs</b> – Meeting BCC's net zero carbon objective	<ul style="list-style-type: none"> <li>•Reduced carbon emissions arising from BCC's social housing stock in line with the Council's net zero pathway</li> </ul>
<b>Tenants needs</b> – Delivering homes which support tenant wellbeing and are affordable for tenants	<ul style="list-style-type: none"> <li>•Tenant's homes meet their needs and the most up to date construction standards</li> <li>•Supporting tenants to avoid fuel poverty, improving health and wellbeing</li> <li>•Homes deliver comfort and minimize energy consumption and are affordable</li> <li>•Tenants are satisfied with intervention process, with home upgrade being delivered with minimal disruption to tenants</li> <li>•Performance of homes is actively monitored to support tenant health and wellbeing</li> </ul>
<b>Strategic Fit</b> – Meeting BCC's City Housing vision, strategy and principles	<ul style="list-style-type: none"> <li>•Customer service – deliver tenant's homes which are future proofed and not subject to multi-year interventions</li> <li>•Early intervention and prevention – upgrading home through a single intervention affords best outcome for tenants</li> <li>•Performance focused culture – evidence based approach, efficient and effective use of resources</li> <li>•Landlord services – improved care of tenants, proactive management of properties, estates, tenancies</li> <li>•Return on Investment – clear, whole-life costed benefits realization</li> <li>•Statutory duties – compliance with statutory legislative and policy framework</li> <li>•Reputational – taking account of national and local political context; engaging elected members</li> <li>•Levelling up strategy - making a positive contribution by undertaking targeted retro fit to fuel poor social housing households</li> <li>•2030 carbon target – solution best positions BCH in contributing to net zero ambition</li> </ul>
Desired Outcome (continued)	Critical Success Factor(s)
<b>Benefits</b> – achieving wider social and economic outcomes	<ul style="list-style-type: none"> <li>•Leveraged opportunity to develop local skills, including apprenticeships &amp; support local communities</li> <li>•Leveraged opportunity to create local jobs</li> <li>•Local supply chain up-scaled to deliver pilot and positioned to meet arising demand</li> <li>•Stimulate and mature local supply chain, manufacturing and materials sourcing</li> </ul>
<b>Deliverability</b> – City Housing's ability to manage the required change	<ul style="list-style-type: none"> <li>•Level of change required within City Housing operations and management</li> <li>•BCH develop and acquire capability and capacity to manage and execute delivery oversight</li> <li>•Pilot to deliver within a two-year timeframe</li> </ul>
<b>Supply side capacity and capability</b> – ability of market and potential suppliers to deliver the required services	<ul style="list-style-type: none"> <li>•Leveraged opportunity to optimize local supply chains</li> <li>•Work with partners to expand the low-carbon sector</li> <li>•Ensure activity in local supply chains meets BCC ethical standards</li> </ul>
<b>Scalability</b> – support BCH aspiration to scale as one of the solutions within a portfolio targeting the wider estate	<ul style="list-style-type: none"> <li>•Gated and staged approach to pilot with clear KPIs and go/no-go criteria provides controlled approach to delivery and development of insights and learnings to support scalability</li> </ul>
<b>Affordability</b> - ability to fund the required level of expenditure	<ul style="list-style-type: none"> <li>•Impact on HRA</li> <li>•Ability to generate future interest from public and private sector sources of investment</li> <li>•Ability to support attracting future grant funding</li> </ul>

### 3.2.1 Evaluating Social & Economic Value

BCC is investing in the Whole House Retrofit Pilot to test the approach and the potential to scale it up for its social housing stock to ensure future deliverability, maximise opportunities to deliver high quality homes, fit for the future and provide the skills and employment that comes along with such large work programmes.

The scale of the council's stock ownership is large: circa 60,000 homes. The delivery of a social housing retrofit pilot presents a material opportunity for BCC to progress towards its net zero carbon ambitions, and to make a significant contribution to economic recovery and growth through

employment and skills opportunities for local businesses and the local community, in addition to creating a healthy community supporting a just transition.

The Whole House Retrofit programme generates the potential for social value outputs in a number of core areas including employment opportunities, skills and health and wellbeing, as well as environmental and carbon reduction outcomes. A subset of six key measures of social and economic value drawn from the Birmingham Business Charter for Social Responsibility (BBC4SR) have been used to assess the social and economic impact of the three options.:

- a. More local employment
- b. More local training
- c. Number of apprenticeships
- d. Number of properties transitioned to higher EPC
- e. tCO2e<sup>19</sup> saved
- f. Fuel poverty reduction / saving to tenants

## Options Evaluation

The options have additionally been assessed against a broad set of evaluation criteria<sup>20</sup>:

- a. Critical Success Factors (CSFs); aligned to BCC Housing strategy
- b. Risks and Issues; covering technical, supply chain, delivery tenant and costs
- c. Social & Economic Values; assessed by Equans for options 1 and 2, based on their market insight and knowledge; and by Energiesprong for option 3, based on information from ongoing, active pilots in the UK
- d. Delivered Costs; provided by Equans for options 1, 2 and 3 to ensure consistency of prices and values applied for materials and labour

To support the options assessment the following weightings were applied to the evaluation criteria:

- a. Critical Success Factors – weighting 30%
- b. Risks & Issues – weighting 10%
- c. Social & Economic Values – weighting 20%
- d. Delivered Costs – weighting 40%

To undertake the options assessment and rank the options, BCC housing, procurement and finance assessors were provided with a scoring matrix and tasked with individually scoring each of options (and a 'do-nothing' option) as either High, Medium or Low against the identified criteria. The assessment scores were presented back in anonymised form for group evaluation and moderation.

The results of the options assessment are summarized below:

---

<sup>19</sup> tCO2e, tonnes of CO2 emissions

<sup>20</sup> The full list of criteria is contained in the Options evaluation matrix



Categories	Score				Weighted Score			
	Do nothing	Option1 EPC C	Option 2 EPC B+	Option 3 EPC A	Do nothing	Option1 EPC C	Option 2 EPC B+	Option 3 EPC A
Critical Success	80	100	420	480	24	30	126	144
Risks & Issues	630	600	340	250	63	60	34	25
Social & Economic	60	80	240	360	12	16	48	72
Delivered Cost	60	60	30	10	24	24	12	4
	830	840	1,030	1,100	123	130	220	245

The options assessment scores rank option 3 the highest, closely followed by option 2. Option 1 and the option to do-nothing both attracted very low scores.

Option 3 was assessed most highly in the categories of BCC's Critical Success Factors and Social & Economic value – the expectation, in line with BBC4SR, that a significant proportion of materials would be pre-fabricated locally. However, as an innovative and new approach to whole house retrofit it was also assessed to be a higher risk option and to have a higher cost – as evidenced by the low scores relative to option 1 and 2.

The findings from the economic appraisal are summarized for each option and the preferred option below:

	Undiscounted (£m)	Net Present Cost (Value) (£m)
<b>Option 1 – EPC-C</b>		
Capital	15,345,383	13,053,624
Revenue	1,355,558	900,370
Risk retained		
Optimism bias (if applicable)	835,047	697,700
Total costs	17,535,988	14,651,694
<b>Less</b> cash releasing benefits		
Costs net cash savings	<b>17,535,988</b>	<b>14,651,694</b>
Non-cash releasing benefits		
<b>Total</b>	<b>17,535,988</b>	<b>14,651,694</b>

	Undiscounted (£m)	Net Present Cost (Value) (£m)
<b>Option 2 – EPC B+ (Equans)</b>		
Capital	23,591,471	20,395,277
Revenue	1,479,264	1,022,423
Risk retained		

Optimism bias (if applicable)	1,253,537	1,070,885
Total costs	26,324,272	22,488,585
<b>Less</b> cash releasing benefits	663,840	406,979
Costs net cash savings	<b>25,660,432</b>	<b>22,081,606</b>
Non-cash releasing benefits		
<b>Total</b>	<b>25,660,432</b>	<b>22,081,606</b>

	Undiscounted (£m)	Net Present Cost (Value) (£m)
<b>Option 3 – EPC-A (Energie Sprong)</b>		
Capital	29,681,139	26,415,435
Revenue	3,203,338	2,053,405
Risk retained		
Optimism bias (if applicable)	1,644,224	1,423,442
Total costs	34,528,701	29,892,282
<b>Less</b> cash releasing benefits	6,834,840	4,190,223
Costs net cash savings	<b>27,693,861</b>	<b>25,702,059</b>
Non-cash releasing benefits		
<b>Total</b>	<b>27,693,861</b>	<b>25,702,059</b>

	Undiscounted (£m)	Net Present Cost (Value) (£m)
<b>Option 4 – supplier C</b>		
Capital	25,986,030	22,766,157
Revenue	2,203,375	1,455,372
Risk retained		
Optimism bias (if applicable)	1,409,470	1,211,076
Total costs	29,598,875	25,432,605
<b>Less</b> cash releasing benefits	7,141,840	5,195,878
Costs net cash savings	<b>22,457,035</b>	<b>20,236,727</b>
Non-cash releasing benefits		
<b>Total</b>	<b>22,457,035</b>	<b>20,236,727</b>

## Option appraisal conclusions

- Option 0: Do nothing – this option, continue with business as usual, ranks last as it makes little contribution to BCC’s ambition to be carbon neutral by 2030, does not contribute to improving the tenants’ health and wellbeing by raising the quality of their living environment and does not support reducing tenant fuel poverty. It is the cheapest financial option but does not address BCC’s strategic aims.
- Option 1: EPC C – this option ranks third. The interventions planned would provide the minimum required contribution to carbon reduction. However, through having EPC C as the target the approach could be characterized as “minimum” fabric first, replacing and upgrading only where necessary. As a result, there would be a more frequent schedule of works over a number of years for individual properties addressing different failing components representing more disruption for tenants. Achieving EPC C will not deliver a stepped change to the living environment and will have a minimal effect on reducing levels of fuel poverty. This option enables BCC to achieve the expected statutory requirement for social housing to achieve a minimum of EPC C by 2035.
- Option 2: EPC B+ – this option ranks joint first. The scale of the interventions and adoption of air source heat pumps (ASHP) and solar photovoltaic (PV) panels will contribute significantly to reducing the properties’ carbon emissions. Through adopting a traditional fabric first approach to whole house retrofit this option scored lower against the categories of Critical Success Factors and Social & Economic values. It is seen as less likely to deliver value in the local supply chain. However, as a demonstrated solution with a lower financial cost than option 3, it scored higher for lower risk and costs. The works will deliver internal and external enhancements to properties which will reduce the tenant’s consumption of energy and exposure to rising energy costs – helping to reduce fuel poverty. With all works delivered through a single intervention it is less disruptive over time and provides a healthier environment in a single step for tenants.
- Option 3: EPC A / Energiesprong – this option ranks joint first. It will deliver the highest reduction in carbon to BCC. This solution combines a fabric, energy (ASHP and PV) and tenant approach to whole house retrofit. The solution is designed around achieving zero carbon emissions and delivering a performance outcome for tenants – a guaranteed level of hot water and energy for a fixed level of energy consumption. This delivers a healthy living environment for tenant wellbeing and reduces fuel poverty through minimizing tenant exposure to rising fuel costs. This is an innovative approach to whole house retrofit and using BBC4SR scoring, the volume proposed in the pilot has been estimated to have the highest impact on social and economic value through additional on-site skills and demand for the manufacturing of new and pioneering panels and roof cartridges with integrated PV. This solution scored the lowest on cost as the initial financial cost for this solution is the highest, but the approach to delivery is structured around lean principles to drive costs down over the term of the pilot. With an on-site target delivery of 10-15 days this solution delivers a future proofed property through a single intervention and offers the lowest disruption for the tenant. This option additionally incorporates a high level of digital enablement and monitoring of the WHR solution components including temperatures, energy consumption, air flow and ventilation. This supports the tenant to better monitor and manage their living environment and will, via IoT, enable BCC to receive up-to-date information on the internal environment, condition and performance of key solution components to support tenant health and wellbeing and also support proactive asset management and maintenance.

### 3.2.2 Overall findings: The preferred Option

Based on the detailed option appraisal and economic appraisal it is proposed that the Whole House Retrofit Pilot is progressed for option 2 and option 3. The proposal is that the option 2 solution is applied to 126 cross-wall properties and that the option 3 solution is applied to 174 low-rise flats.

### 3.2.3 Overall conclusions and recommendations

The proposal to adopt a pilot which comprises a combination of option 2 and option 3 will provide BCC with a robust case for impact assessment for two solutions, support the BCC ambition to evaluate and apply innovative solutions and ensure that BCC take a prudent approach to managing costs and risks.

This approach maximizes the contribution to BCC carbon aims and provides the best solutions for tenants, helping protect against rising fuel prices and through improving the living environment deliver improved health and wellbeing.

Adopting the combination of a traditional and innovative approach to whole house retrofit will support evidencing BCC's commitment to addressing environmental and social challenges to government also afford more scope to attract grant funding. In recent years this has switched between a focus on innovation versus more traditional intervention focus. This pilot covers the full range of likely focus and best positions BCC for future rounds of SHDF and other grant funding opportunities.

## 3.3 C3 - Risks and Issues

No.	Description	Impact	Mitigation
1	High demand for construction leading to supply constraints limit cost reduction	Difficult to secure materials and components, leading to delays and cost overrun	Share delivery plan in engagement with supply chain and ring fence orders
2	Unit delivery overruns leading to cost increase	Pilot delivery delayed and budget at risk	Root cause analysis on any overrun, implement targeted interventions to rectify / avoid
3	Shortage in availability of skills and intervention components	Pilot delayed and cost premium on skills and components	Proactive approach to forward booking of resources, purchase of components
4	Local companies may not have capacity to provide the demand for components	Materials and components are sourced outside of local geography	Early engagement with local companies
5	Failure to secure Cabinet & statutory approvals & planning	Pilot is not approved to go ahead	Pilot business case is socialised with Cabinet ahead of formal submission
6	Resurgence of COVID or other world events impact delivery	Pilot delivery is slowed, and overall delivery delayed	Appropriate measures implemented to lessen impact of events
7	Resistance to sign up to comfort plan	Delay to starting Energiesprong properties	Implementation of tenant engagement and support plan at onset of project



8	Residents unhappy with disruption & time taken to deliver interventions/works	Risk to BCC reputation and possible delays	Implement tenant and resident engagement and communications plan at onset of project
9	Failure to secure tenant participation	Risk to BCC reputation and possible delays	Implement tenant and resident engagement and communications plan at onset of project
10	Specified performance outcomes not met	Costly remedial work to address and ensure specification achieved	In situ testing and quality assurance of components and full hand over protocol
11	Design errors or omissions	Costly remedial work to address and ensure specification delivered	Phased ramp up with early assessment to performance expectations

## 4 Section D – Commercial Case

*This considers whether realistic and commercial arrangements for the project can be made*

### 4.1 D2 - Procurement implications and Contract Strategy

To support the development of the procurement strategy, Corporate Procurement engaged the services of Local Partnerships, who are jointly owned by the Local Government Association, HM Treasury and the Welsh Government. Local Partnerships have a wealth of experience in public sector procurement and in particular, the housing and retrofit category areas.

Local Partnerships, supported by Corporate Procurement, have undertaken a detailed market review of procurement options available for the delivery of retrofit within social housing. Specifically, the options available to deliver to EPC B+ and EPC A, as required for testing during the Whole House Retrofit Pilot. One of the main methods used to support the review was the established Energy Systems Catapult's PCR 15 compliant 'Net Zero Go: Procurement Tool'.

This review process identified 33 frameworks/ Dynamic Purchasing Systems (DPS) that exist to support the delivery of domestic retrofit. To appraise these in more detail, further desktop research and engagement with owners of the Frameworks and DPS has been undertaken to assess the suitability of their agreements. After due consideration 10 frameworks were shortlisted for further review.

As more than one route can be adopted to achieve BCC's aims and the requirements of the Pilot, Local Partnerships & Corporate Procurement developed detailed assessment criteria, against which to assess the suitability of the shortlisted Frameworks and DPSs, as well as the Council's own in house contract provisions in this area. Following this detailed assessment, the below procurement routes have been identified as the most appropriate for this pilot:

- EPC B+: The Council's current contract for the provision of R&M, Gas Servicing and Capital Improvement Works Programmes.
- EPC A: Greater London Authority: Retrofit Accelerator Homes Innovation Partnership (RAHIP)

Additional information to support the Procurement Implications and Contract Strategy is contained in Appendix 3.

## 5 Section E – Financial Case

**This section sets out the cost and affordability of the programme**

### 5.1 E1 - Impact on the organisation's MTFP

The purpose of this section is to set out the indicative financial implications of the two option(s) as set out in the Economic Case above.

Based on the detailed option appraisal and economic appraisal it is proposed that the Whole House Retrofit Pilot is progressed for:

- Option 2 – EPC B applied to 172 low-rise flat properties
- Option 3 – EPC A (Energiesprong) applied to 126 cross-wall home properties

The proposal to adopt a pilot which comprises a combination of option 2 and option 3 will provide BCC with a robust case to test and assess the impact of two solutions and the potential to scale the retrofit solutions.

**Table 1 –**

£(m) xxx	Year 0	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Future Years (7-30)	Total
	£(m)	£(m)	£(m)	£(m)	£(m)	£(m)	£(m)	£(m)	£(m)
<b>Preferred choice: Option 2</b>									
Capital		9.26						2.53	11.79
Revenue	0.09	0.08	0.02	0.02	0.02	0.02	0.02	0.47	0.74
<b>Total</b>	<b>0.09</b>	<b>9.34</b>	<b>0.02</b>	<b>0.02</b>	<b>0.02</b>	<b>0.02</b>	<b>0.02</b>	<b>2.99</b>	<b>12.53</b>
<b>Funded by:</b>									
PV Export Tariff		- 0.01	- 0.01	- 0.01	- 0.01	- 0.01	- 0.01	- 0.27	- 0.33
Right to buy receipt	- 1.95								- 1.95
Borrowing	- 10.24								- 10.24
<b>Total</b>	<b>- 12.19</b>	<b>- 0.01</b>	<b>- 0.01</b>	<b>- 0.01</b>	<b>- 0.01</b>	<b>- 0.01</b>	<b>- 0.01</b>	<b>- 0.27</b>	<b>- 12.53</b>

Table 1 above shows the cost (£12.53m) of retrofitting the proposed 150 properties (2 archetypes) based on option 2. The capital cost (£11.79m) is made up of the intervention cost (cost of the retrofit) and the lifecycle (replacement) cost while the revenue cost (£0.74m) is made up of the service & maintenance and project cost. The retrofit is to be partly funded by photovoltaic tariff income of £0.33m, right to buy receipts of £1.95m, and borrowing of £10.24m.

It should be noted that though circa. £17m has been earmarked within Housing Division's business plan for the retrofit project, a significant portion of the amount is to be sourced via borrowing. There is the possibility that external grant from the government may be available which will help reduce the funding pressure but at the time of preparing this business case, details on how to access the grant or the eligible amount is not yet available. By sourcing the funding via borrowing, there is the expectation for an annual minimum revenue provision (MRP) to be set aside to help cover the repayment of the debt. The MRP has not been factored into the cashflow shown in table 1.

**Table 2 -**

£(m) xxx	Year 0	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Future Years (7-30)	Total
	£(m)	£(m)	£(m)	£(m)	£(m)	£(m)	£(m)	£(m)	£(m)
<b>Preferred choice: Option 3</b>									
Capital		12.35						2.49	14.84
Revenue	0.08	0.08	0.03	0.09	0.03	0.05	0.09	1.16	1.60
<b>Total</b>	<b>0.08</b>	<b>12.44</b>	<b>0.03</b>	<b>0.09</b>	<b>0.03</b>	<b>0.05</b>	<b>0.09</b>	<b>3.65</b>	<b>16.44</b>
<b>Funded by:</b>									
PV Export Tariff & Comfort Plan		- 0.11	- 0.11	- 0.11	- 0.11	- 0.11	- 0.11	- 2.73	- 3.42
Right to buy receipt	- 1.95								- 1.95
Borrowing	- 11.07								- 11.07
<b>Total</b>	<b>- 13.02</b>	<b>- 0.11</b>	<b>- 0.11</b>	<b>- 0.11</b>	<b>- 0.11</b>	<b>- 0.11</b>	<b>- 0.11</b>	<b>- 2.73</b>	<b>- 16.44</b>

Table 2 above shows the cost (£16.44m) of retrofitting the proposed 150 properties (2 archetypes) based on option 3. The capital cost (£14.84m) is made up of the intervention cost (cost of the retrofit) and the lifecycle (replacement) cost while the revenue cost (£1.6m) is made up of the service & maintenance and project cost. The retrofit is to be partly funded by photovoltaic tariff income of £0.33m, comfort plan income of £3.1m, right to buy receipts of £1.95m, and borrowing of £11.07m.

The Energiesprong model provides a number of technical innovations which provide sufficient assurance around the energy savings that the contractor is prepared to guarantee an agreed level of energy savings made by households for ten years. These innovations include the high levels of roof and wall insulation, high levels of airtightness, heat recovery ventilation systems, 'free' renewable electricity from solar PV panels and digital instruments and sensors which allow detailed monitoring of energy usage and household behaviour. In turn, this allows for 'hands on' behavioural change support to help households maximise opportunities for lowering energy bills. This also allows introduction of a model by which a proportion of the financial savings made by residents are contractually 'paid back' to contribute towards the cost of retrofit works to the landlord, who would otherwise see very little if any direct financial benefits, to offset the high cost of these works. For the Energiesprong model, this tenant contribution is known as the 'Comfort Plan'.

'Pay as you save' models such as the Comfort Plan are seen as an important financial innovation which will help to make large scale retrofit projects more financially viable. Whilst the Energiesprong model is designed to support households to achieve the predicted level of savings, reassurance could be provided from testing out the levels of savings made as part of the pilot, before charging the Comfort Plan to households.

It should be noted that though circa. £17m has been earmarked within Housing Division's business plan for the retrofit project, a significant portion of the amount is to be sourced via borrowing. The total borrowing required for delivering options 2 and 3 is £21.32m (£10.24 + 11.07). There is the possibility that external grant from the government may be available which will help reduce the funding pressure but at the time of preparing this business case, details on how to access the grant or the eligible amount is not yet available. By sourcing the funding via borrowing, there is the expectation for an annual minimum revenue provision (MRP) to be set aside to help cover the repayment of the debt. The MRP has not been factored into the cashflow shown in table 2.

## 5.2 E2 - Impact on the Council's balance sheet

<p>The proposed expenditure will have the following impact on BCC's balance sheet:</p> <ol style="list-style-type: none"> <li>1) Asset increase – The whole house retrofit will result in an increase the value of the properties. This increase in value would be reflected in council's balance sheet under Fixed Assets (Property &amp; Equipment)</li> <li>2) Increased debt – The borrowing undertaken by the council to finance the retrofit will result in an increase in the value of the long-term debt of the council</li> <li>3) Minimum revenue provision (MRP) – By virtue of the borrowing used to finance the retrofit, MRP is charged to the council's HRA balance to make provision for the repayment of the debt.</li> </ol>	
------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	--

## 5.3 E3 - Overall affordability

--



Total Costs & Income									
	Intervention Cost	Life Cycle Costs	S&M and Project Costs	Gross Expenditure	Income Excluding Comfort Plan	Comfort Plan	Gross Income	Net Expenditure	NPV
Option 1	5,874,371	1,794,000	677,779	8,346,150				8,346,150	6,972,822
Option 2	9,260,547	2,525,250	739,632	12,525,429	(331,920)		(331,920)	12,193,509	10,495,758
Option 3	12,354,320	2,486,250	1,601,669	16,442,238	(331,920)	(3,085,500)	(3,417,420)	13,024,818	12,139,309
Per Unit Costs & Income									
	Intervention Cost	Life Cycle Costs	S&M and Project Costs	Gross Expenditure	Income Excluding Comfort Plan	Comfort Plan	Gross Income	Net Expenditure	NPV
Option 1	39,162	11,960	4,519	55,641				55,641	46,485
Option 2	61,737	16,835	4,931	83,503	(2,213)		(2,213)	81,290	69,972
Option 3	82,362	16,575	10,678	109,615	(2,213)	(20,570)	(22,783)	86,832	80,929

Table 3 above provides a summary of the net expenditure of delivering the project (150 properties – 2 archetypes) based on the three options considered.

The net cost of delivering options 2 and 3 is £25.21m over the thirty years expected lifespan of the WHR project. Circa. £17m was originally earmarked for the WHR project within Housing Division's business plan on the basis that £1.62m would be funded by grant, £3.9m funded by 'Right to Buy' receipts and £11.24m by borrowing.

At the time of writing this business case, confirmation of available grant by government has not been received so it may be prudent to assume that £21.32m (£25.21 - £3.9) of borrowing would be required to deliver options 2 and 3. On the basis that the £21.32m can be borrowed via PWLB at the average interest rate of 2.55% over thirty years, this would result in a cost of borrowing of £708.7K over the loan period.

It is worth highlighting the risk associated with the comfort plan relating to option 3. It is assumed that income contribution of £3.1m over the life of the project will be achieved via the comfort plan so if this income from tenants does not materialise, it would increase the cost of delivering the project.

## 5.4 E4 – Approach to Optimism Bias and Provision of Contingency

The scope of work assumes that the properties to be retrofitted are likely to be in a poor state. It is possible that not all properties will require a full set of retrofit interventions (e.g. new boiler/heating system, doors and windows) this will be determined during detailed survey works. Preliminary costs have been priced at 12% of measured works and are subject to change following the development of a full works programme.

Though a contingency of 5% has been included in the costs, it should be noted that this is unlikely to cover unforeseen works such as structural works, asbestos removal, damp works etc.

Optimism bias have not been considered in the cost projections.

## 5.5 E5 – Taxation

The supply and installation of energy saving materials is liable to VAT at the standard rate of 20%.

As BCC's provision of residential accommodation through its HRA is a non-business activity for VAT purposes, BCC can reclaim VAT on the costs of maintaining its residential stock within its HRA. Therefore, BCC can reclaim VAT on the installation of energy saving materials within HRA residential properties. As such, VAT should not be a cost to the project.

## 6 Section F – Management Case

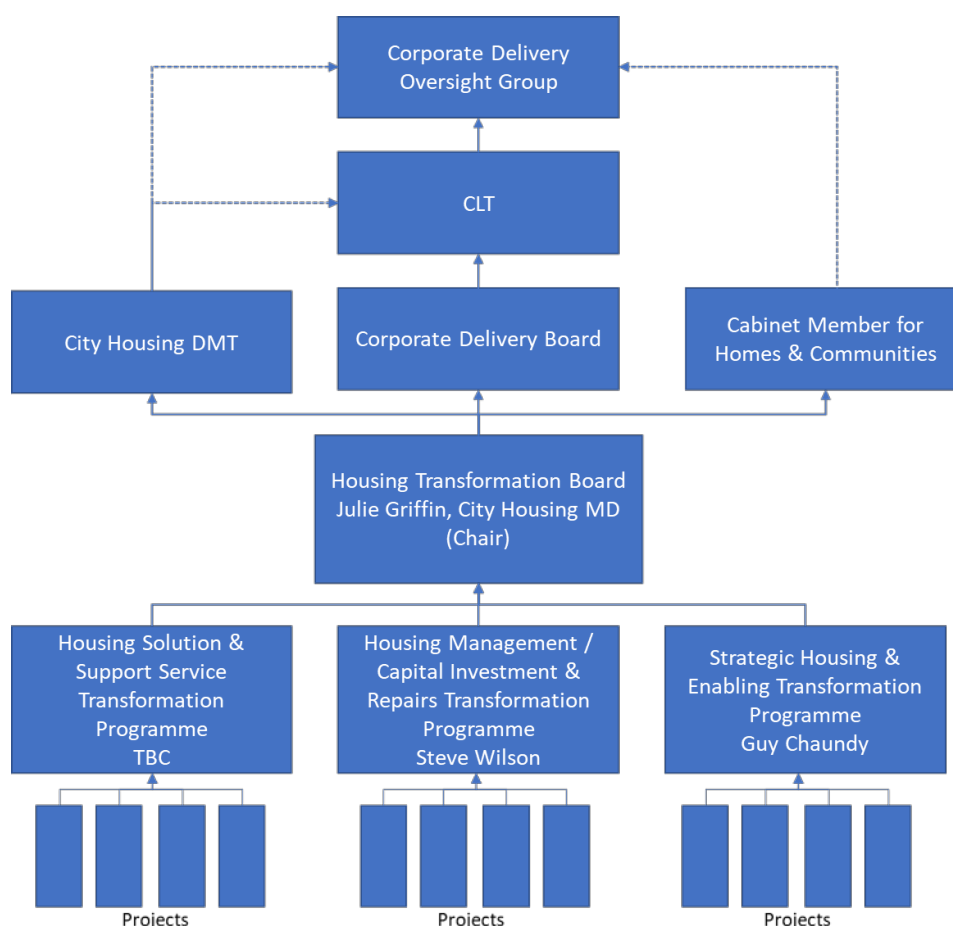
This section considers how robust your programme delivery plans and arrangements are

### 6.1 F1 - Programme management arrangements

The Whole House Retrofit Pilot project is an integral part of the City Housing Transformation Programme which comprises a portfolio of projects for the delivery of the City Housing vision:

- To become “best in class”
- To provide a responsive and sustainable service that is relentlessly reliable and builds trust by placing tenants and residents at the centre of what we do.
- Offering excellent customer service, ensuring our tenant’s homes meet their needs and standards for now and the future.

The City Housing Transformation Programme governance and its interface to the Council’s corporate governance arrangements is illustrated below:



The Whole House Retrofit Pilot project is a core component of the Housing Management / Capital Investment and Repairs Transformation Programme.

Each City Housing Transformation Programme is led by a named SRO and reports to the Housing Transformation Board. The Housing Transformation Programme Board, chaired by the MD City Housing is responsible for delivery of the portfolio of projects and provides strategic leadership and direction.

## 6.2 F2 - Programme management arrangements

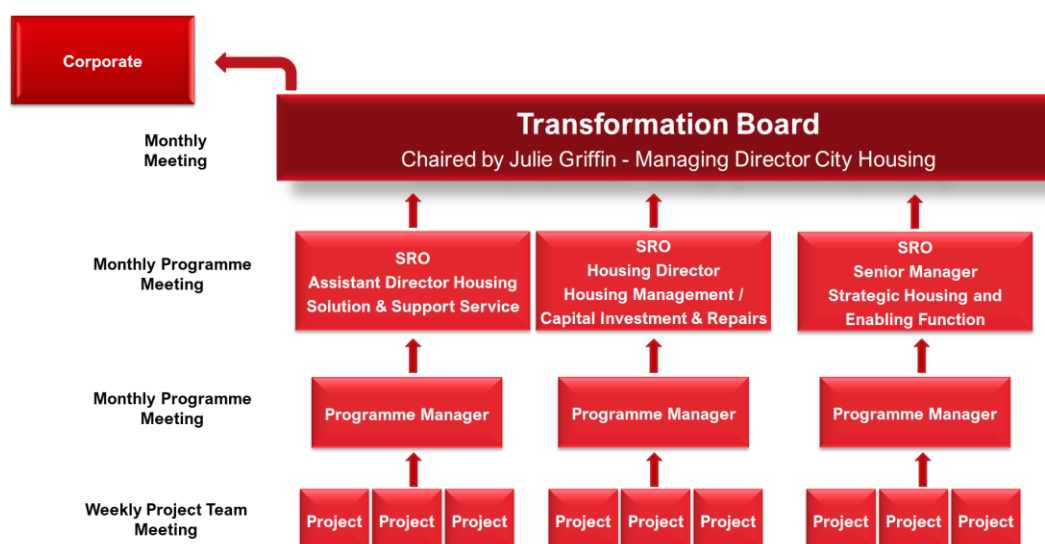
The project will be managed in accordance with BCC corporate projects and programmes methodology, as agreed with the Housing Transformation Programme and corporate PMO.

The project will report monthly in line with the Corporate PMO dashboard reporting.

### 6.2.1 Programme reporting structure

Oversight of the project will be provided by the City Housing Transformation Programme Board which meets monthly and addresses projects by exception, or otherwise at the discretion of the Chair.

The Housing Transformation Programme organization and reporting structure are illustrated in the figure below:



### 6.2.2 Programme roles and responsibilities

The BCC Whole House Retrofit Pilot core project team will include:

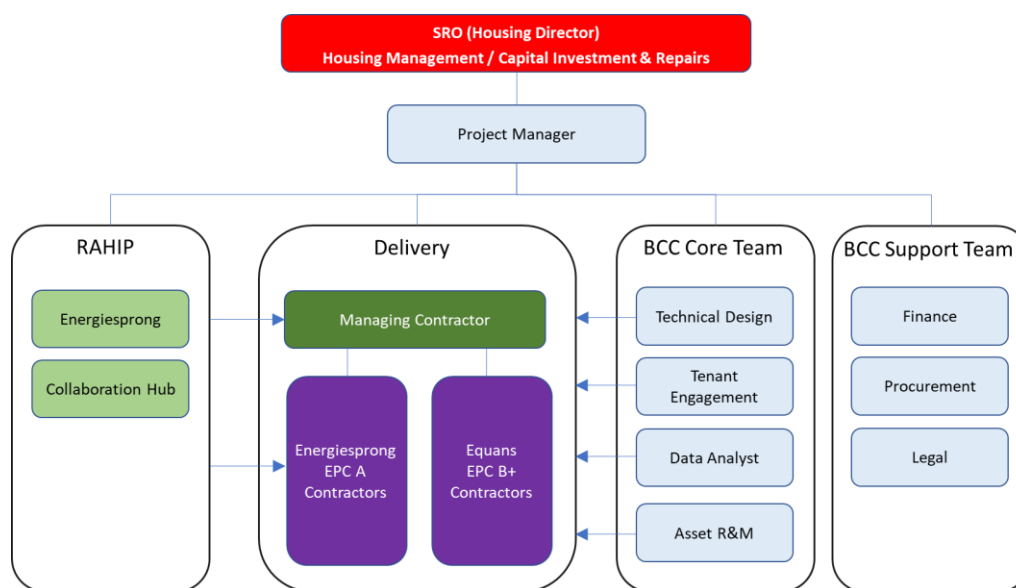
- **Senior Responsible Owner** - responsible for primary engagement and oversight, budget timing, quality compliance and grant application activities.
- **Project Manager** - responsible all project delivery, including day to day liaison with managing contractor and internal departments to support logistics, access arrangements and resident engagement
- **Housing Technical Design lead** – responsible for advising on technical, quality and energy related matters at all stages of the development process; performance and quality management of commissioned designs; managing the Council's design brief all key internal stakeholders.
- **Housing Assets / Capital R&M lead** – responsible for ensuring pilot delivery is compliant with all statutory, contractual, Health and Safety legislation and regulators requirements.



- **Housing Management and tenant engagement lead** - responsible for dealing with the tenants, local authorities, residents, local resident associations and groups and other stakeholders in the pilot geographic area. Additionally, responsible for the creation and delivery of tenant engagement plan(s) and content, and of tenant education, awareness and training. Responsible for executing tenant feedback activities.
- **Housing Data Analyst** – responsible for managing the ongoing reporting requirements, including performance analytics and ad hoc reporting requests. Responsible for ensuring integrity of property data in asset management systems, budget reviews and preparation (as needed).
- The BCC supporting team will include:
- **Finance lead** – budget and financial management services including grant application support.
- **Procurement lead** – putting in place and monitoring compliance within agreed procurement arrangements and advising any changes in scope.
- **Legal lead** – advice on initial contracting arrangements, and arising legal issues over the duration of the pilot including but not limited to right to buy and leasehold.

It is intended that the Pilot will be delivered by BCC's Strategic Housing Repair Partner (Equans). Equans will act as the overarching Solution Delivery Partner for the two options.

The Whole House Retrofit Pilot project organisation and reporting structure is illustrated below:



Core project management activities will include:

- Monthly progress monitoring meetings. These meetings will be chaired by the SRO, led by the BCC project manager and attended by the managing contractor and key project team and other key stakeholders.
- Weekly project management team meetings chaired by the BCC project manager and led by the managing contractor and Energiesprong leads)
- Weekly scheme delivery meetings at which the managing contractor will monitor pilot progress, resolve arising issues, categorise and report on risks and mitigations.
- Quarterly Collaboration Partner Meetings bringing together the SRO, managing contractor, senior leads from key supply vendors, Energiesprong and collaboration hub representatives; this group will provide an assurance check on project progress, shared learnings to contribute to problem resolution and emerging insights from more advanced pilots.

- Pilot resources and project risks will be reviewed by exception at each monthly meeting with a focus on ownership, timescales and dependencies

The project resource costs are captured in the financial model above.

### 6.2.3 Programme plan

The WHR programme plan<sup>21</sup> comprises four key components, tenant and resident engagement; the WHR of 174 low rise flats, using the existing housing capital programme contractual arrangements; the WHR of 126 cross wall properties using the RAHIP framework; and report The high-level milestones for these three components are detailed in the tables below. The WHR programme team will undertake planning and preparation activities to ensure the programme is in a position to mobilise following consideration by Cabinet:

Milestone Activity – Tenant & Resident Engagement	Month
Confirm target properties/tenants – by archetype	July 2022
Develop and agree engagement plan	July/Aug 2022
Initial tenant and community engagement	July - Sept 2022
Initial tenant engagement - design and concepts <sup>22</sup>	July - Sept 2022
Comfort plan and in principle agreement (cross wall)	July - Oct 2022
Condition surveys by archetype	July/Aug 2022
Engagement- Pre, during and post works – by typology	September 2022
Commissioning and handover – by typology	December 2022
Tenant pilot evaluation	March 2024

Milestone Activity – WHR 174 low rise flats	Month
Pre-construction activities	July 2022
Supply chain procurement	September 2022
Pilot block (1 x 8 units)	Oct/Nov 2022
Assessment and review	Dec 2022 /Jan 2023
Phased Block rollout (12 x 14 units)	Jan 2023 – Jan 2024
Pilot scheme evaluation and report	March 2024

Milestone Activity – WHR 126 cross wall properties	Month
Retrofit system design	July 2022
End of stage evaluation	September 2022
Stage: Prototype 10 cross wall properties	Oct/Nov 2022
End of stage evaluation	February 2023
Stage: Pilot 30 cross wall properties	March/April 2023
End of stage evaluation	July 2023
Stage: Commercialise 86 cross wall properties	Aug 2023 – Jan 2024
Pilot scheme evaluation and report	February 2024
Digital operation of performance monitoring	February 2024

<sup>21</sup> See appendix XYZ for more detail on the programme plan.

<sup>22</sup> For cross wall using Energiesprong solution will include Comfort Plan and tenant energy bill baseline

Milestone Activity – Report to Cabinet	Month Beginning
Report to Cabinet – Business Case approval	July 2022
Interim Progress Report to Cabinet on Pilot	March/April 2023
Report to Cabinet on Pilot and recommendations for Scaling	March/April 2024

### 6.3 F3 - Use of special advisers

Special advisers and officers were consulted in developing the business case used as follows:

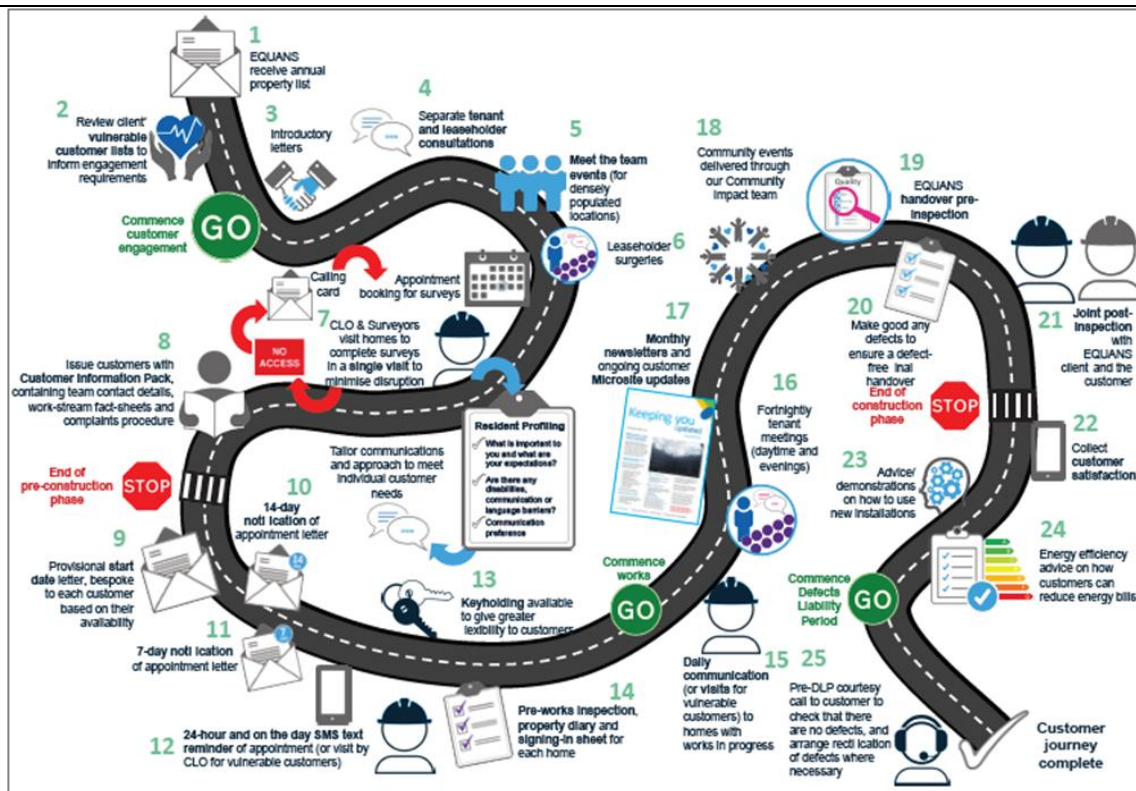
Specialist Area	Adviser
Economic	Spencer Wilson, John English, Kerry Billington, GBSLEP Wayne Shand Chris Sood-Nicholls, David Willock, Lloyds Rokneddin Shariat, BCC Mark Ambler, Tara Shresty–Carney, PwC
Skills	Ilgun Yusef, Tara Verrell, BCC Mike Hopkins, Bob Howlett, SCCB Spencer Wilson, John English, Kerry Billington, GBSLEP
Financial	Andrew Healy, BCC Chris Sood-Nicholls, David Willock, Lloyds
Technical	John O’Leary, Paul Bingham, Phil White, David Parry, Lee Ashmore, Steve Batty, Chris Saunders, Equans Keith Butler, Focus Consultants for Nottingham City Council
Tenant Engagement	John Bloss, London Borough of Barking & Dagenham
Procurement / Legal	Kore Mason, Turner & Townsend Neil Pierce, Head of Sustainability & Climate Change, London Borough of Barking & Dagenham Michael O’Doherty, Vicky Kingston Local Partnerships

### 6.4 F4 - Arrangements for change management

Change management will be delivered in line with the framework defined by the corporate PMO and adopted by the City Housing Transformation programme.

The Whole House Retrofit Pilot will be a new and transformative approach to improving homes. In addition to the delivery of capital interventions to the fabric of homes, it incorporates a change in the energy supply from gas-based heating to a combination of Air Source Heat Pumps (ASHP) and solar Photo Voltaic – this will deliver a different tenant experience. Engagement with BCC tenants (and residents in the selected neighbourhood) over the lifecycle of the Pilot, including education, awareness and training on the operational and behavioural impact of the retrofit solutions is core to the change management approach.

Equans has a strong track record of delivering planned maintenance services with tenants. The Whole House Retrofit Pilot will deploy their resident engagement framework – this places the resident and tenant experience at the heart of the delivery. This is illustrated below:



To promote a partnership approach with tenants, the Pilot project will engage with tenants and other key stakeholders as early as possible. Communications events will be held with key stakeholders to promote the rationale and benefits of the pilot, address resident and community concerns and set out how delivering in partnership will work – helping shape the approach to co-design, consultation, communication, and liaison.

The resident engagement approach will be deployed from the outset and will include

- Resident involvement in design process
- Solution Provider presentations to residents
- Liaison regarding up-coming works to homes
- Consideration and planning for decant arrangements if required

This approach will be informed from the experience of other Energiesprong local authority landlords and leverage the work underway as part of the East Birmingham Inclusive Growth Programme around community engagement and community learning.

## 6.5 F5 - Arrangements for benefits realisation

Benefit realisation for the project will be overseen at the Housing Transformation Programme level by the Housing Management / Capital Investment & Repairs Transformation Programme and City Housing Transformation Programme Board. The programme manager will be responsible for the day-to-day implementation of the benefit realisation plan.

The high-level objectives and benefits will be as set out in this business case. The detailed benefit realisation plan will be developed during the solution design phase of the project and reported to the City Housing Transformation Programme Board.



## **6.6 F6 - Arrangements for risk management**

Risks will be managed at the project level by the Project Manager and at City Housing Transformation Programme level by the Housing Management / Capital Investment & Repairs Transformation Programme City Housing Transformation Programme Director and Programme Board.

Risk management methodology will follow the City Council's standard approach as agreed with the Corporate PMO.

A schedule of risks and issues is provided at Section 3.3.

## **6.7 F7 – Arrangements for dependency management**

Dependencies between project workstreams will be managed at a day to day level by the Project Manager and at City Housing Transformation Programme Board

## **6.8 F9 - Arrangements for contract management**

The pilot will be applying two different approaches to WHR; contract management arrangements are set out in Section 7 of the procurement strategy.

- 

## **6.9 F10 - Arrangements for post project evaluation**

The Whole House Retrofit Pilot project will undertake an interim review of progress in March/April 2023 and a fuller review on the success of the Pilot and recommendations for scaling the solutions in March/April 2024 following the wider solution rollout.

The Pilot evaluation criteria will be developed based on the Critical Success Factors detailed in Section 3.2 above.

Title of proposed EIA	3 Cities Whole House retro fit pilot
Reference No	EQUA917
EA is in support of	Amended Service
Review Frequency	Annually
Date of first review	30/06/2023
Directorate	City Housing
Division	Housing
Service Area	Housing
Responsible Officer(s)	<input type="checkbox"/> Guy Chaundy
Quality Control Officer(s)	<input type="checkbox"/> Mara Shepherd
Accountable Officer(s)	<input type="checkbox"/> Steve Wilson
Purpose of proposal	retro fit to 300 homes as part of 3 cities whole house retro fit pilot
Data sources	relevant reports/strategies; Statistical Database (please specify); relevant research
Please include any other sources of data	
ASSESS THE IMPACT AGAINST THE PROTECTED CHARACTERISTICS	
Protected characteristic: Age	Not Applicable
Age details:	
Protected characteristic: Disability	Not Applicable
Disability details:	
Protected characteristic: Sex	Not Applicable
Gender details:	
Protected characteristics: Gender Reassignment	Not Applicable
Gender reassignment details:	
Protected characteristics: Marriage and Civil Partnership	Not Applicable
Marriage and civil partnership details:	
Protected characteristics: Pregnancy and Maternity	Not Applicable
Pregnancy and maternity details:	
Protected characteristics: Race	Not Applicable
Race details:	
Protected characteristics: Religion or Beliefs	Not Applicable
Religion or beliefs details:	
Protected characteristics: Sexual Orientation	Not Applicable
Sexual orientation details:	

Socio-economic impacts	All Socia Economic impacts and benefits are detailed within the extended business case as part of the Cabinet report
Please indicate any actions arising from completing this screening exercise.	none
Please indicate whether a full impact assessment is recommended	NO
What data has been collected to facilitate the assessment of this policy/proposal?	financial, stock condition, carbon savings, socio economic benefitis
Consultation analysis	Consultation to commence following approval by Cabinet of the proposed pilot approach
Adverse impact on any people with protected characteristics.	none
Could the policy/proposal be modified to reduce or eliminate any adverse impact?	NA
How will the effect(s) of this policy/proposal on equality be monitored?	through ongoing reports annually back to Cabinet
What data is required in the future?	Benefit realisation, digital capture and performance guarantees as part of the physical works
Are there any adverse impacts on any particular group(s)	No
If yes, please explain your reasons for going ahead.	
Initial equality impact assessment of your proposal	
Consulted People or Groups	
Informed People or Groups	
Summary and evidence of findings from your EIA	There is currently no known tenancies identified for this proposal. The Cabinet report is seeking approval to commence consultation and identify those specific properties and tenancies that will benefit from a whole house retro fit pilot delivering financial and physical benefits.
QUALITY CONTORL SECTION	
Submit to the Quality Control Officer for reviewing?	No
Quality Control Officer comments	information reviewed, spelling errors corrected and passed to accountable officer for review
Decision by Quality Control Officer	Proceed for final approval

04/07/2022, 14:56		Assessments - 3 Cities Whole House retro fit pilot	
Submit draft to Accountable Officer?		Yes	
Decision by Accountable Officer		Approve	
Date approved / rejected by the Accountable Officer		04/07/2022	
Reasons for approval or rejection		Approved by Steve Wilson, Project Director - Asset Management on Monday 4th July 2022.	
Please print and save a PDF copy for your records		Yes	
Content Type: Item			
Version: 41.0			
Created at 23/05/2022 11:35 AM by <input type="checkbox"/> Guy Chaundy			
Last modified at 04/07/2022 02:46 PM by Workflow on behalf of <input type="checkbox"/> Steve Wilson			
		<div>Close</div>	





## Appendix 3

### Whole House Retrofit Pilot Procurement Strategy Report



**Report author:** Haydn Brown, Head of Category – Place  
Email Address: [haydn.brown@birmingham.gov.uk](mailto:haydn.brown@birmingham.gov.uk)

## 1 Executive Summary

- 1.1 The Procurement Strategy sets out the detailed review and options appraisal process adopted by Corporate Procurement Services (CPS) in order to evaluate all available options to support the delivery of the Birmingham Whole House Retrofit Pilot. The report also sets out the recommended procurement routes for the delivery of 126 cross-wall properties to EPC A rating and 174 low-rise flats to EPC B+ rating.

## 2 Background

To support the sourcing options appraisal process and the development of the procurement strategy, CPS engaged the services of Local Partnerships, who are jointly owned by the Local Government Association, HM Treasury and the Welsh Government. Local Partnerships have a wealth of experience in public sector procurement and in particular, the housing and retrofit category areas. Local Partnerships have also contributed and supported in the following key project areas:

- Market review & consultation to determine / validate procurement routes
- Review of GLA & London Borough of Barking & Dagenham (LBBD) procurement strategies
- Review of GLA Retrofit Accelerator Homes Innovation Partnership (RAHIP) framework
- Development of potential evaluation criteria based on 300 pilot units and wider scaling across the portfolio.
- Risk Management
- Financial cost modelling based on the recommended procurement option(s)
- Options appraisal process

## 3 Market Analysis

### 3.1 Overview of Market Intelligence

- 3.1.1 Published intelligence providing an overview and analysis of the UK domestic energy efficiency market is limited and tends to focus more on the private sector than on retrofit at scale in the social housing sector. Much of it is over three years old, so will not reflect the impact of the Covid 19 lockdown (which is likely to have had both positive and negative impacts on demand and supply for home improvement works) and introduction of new government energy efficiency funding programmes from 2020 onwards.
- 3.1.2 In launching a 'Call for Evidence: Building a Market for Energy Efficiency'<sup>1</sup>, in 2017, the Department for Business, Energy and Industrial Strategy (BEIS) noted that the energy efficiency products sector was at the time, the largest subsector in the low-carbon and renewable economy, with a turnover of over £13.9 billion and employing over 100,000 people. The insulation and retrofit subsector were also one of three parts of the low carbon economy where the UK was a net exporter in 2017.
- 3.1.3 BEIS acknowledged in its Call for Evidence, the fragmented nature of the domestic energy efficiency market and a lack of detailed knowledge of the distinct sub-sectors each with separate supply chains, installer bases, sources of finance and different regulatory drivers. Whilst the Government keeps detailed records of all measures delivered under Government funded or regulated schemes such as the Energy Company Obligation (ECO), it is aware that many more consumers undertake energy efficiency improvements independent of any Government support. This is particularly the case for measures that are valued by consumers independently of their energy-saving properties such as replacement windows and smart heating controls.
- 3.1.4 The Call for Evidence identified several barriers to developing the market for energy efficiency products and services on both the demand and the supply side. Supply side barriers include: the lack of the necessary skills to deliver retrofit, lack of industry coordination and a historic lack of long-term signals from Government, which has reduced confidence to invest in the energy efficiency market, particularly in relation to innovation and new services. Demand side barriers includes the perception that energy efficiency works are not reflected in increased property values; long pay-back periods; lack of affordable finance options and household disruption caused by the works.
- 3.1.5 The March 2021 Household Energy Efficiency detailed release: Great Britain Data to December 2020<sup>2</sup> found that at the end of 2020, 14.3 million GB properties had cavity wall insulation (70% of properties with a cavity wall), 16.6 million had loft insulation (66% of properties with a loft) and 772,000 had solid wall insulation (9% of properties with solid walls). Indicating that measure which were low cost, minimal disruption or previously subsidised were far more likely to have been delivered.
- 3.1.6 In March 2021, the House of Commons Environment Audit Committee published a critical and challenging report<sup>3</sup> which criticised lack of Government action to date in addressing weaknesses in the domestic energy efficiency market and supply chain, which in turn threatens the UK's ability to meet its legally binding climate change targets. In particular, 'stop-start' policies and intermittent funding streams have resulted in a dearth of competent installers of energy efficiency measures. The report found that this

---

<sup>1</sup> <https://www.gov.uk/government/consultations/building-a-market-for-energy-efficiency-call-for-evidence>

<sup>2</sup> [https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment\\_data/file/970064/Detailed\\_Release\\_-\\_HEE\\_stats\\_18\\_Mar\\_2021\\_FINAL.pdf](https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/970064/Detailed_Release_-_HEE_stats_18_Mar_2021_FINAL.pdf)

<sup>3</sup> <https://committees.parliament.uk/work/309/energy-efficiency-of-existing-homes/>

lack of competent and accredited tradespeople hampered the initial delivery of the Green Homes Grant Voucher Scheme, and that there is a significant risk that the Government will not meet its own heat pump installation targets for the same reason.

- 3.1.7 The UK Heat and Buildings Strategy (2021) identifies the need to grow the UK-based supply chain and deployment of heat pump systems. The strategy seeks to develop the market from approximately 35,000 heat pumps a year to at least 600,000 per year by 2028, replacing around 1.7 million fossil fuel boilers per year by the mid-2030s.

### 3.2 Description, Size, and Growth of the Market

- 3.2.1 The UK market for energy efficiency measures and services is fragmented and immature, characterised by Small and Medium Sized Enterprise (SME) suppliers, particularly in the owner occupied and Private Rented Sector (PRS) with some specialised insulation and heating providers but in the main is characterised by general repairs and maintenance and home improvement contractors.

- 3.2.2 Until recently, the market has been characterised by installation of low-cost measures including loft and cavity wall insulation, and replacement of older inefficient gas boilers with high efficiency condensing gas boilers and smart heating controls and meters. As these 'low hanging fruit' measure have largely been delivered, attention has turned to 'deeper' more expensive energy efficiency measures such as solid wall insulation hard to treat properties and installation of air source heat pumps (ASHP).

- 3.2.3 It is notoriously difficult to apply size and growth metrics to the energy efficiency market, in part due to its fragmented nature, and its interconnectivity with other markets such as home improvement and heating and the fact that in the private sector at least, many energy efficiency measures will be privately funded as part of other home improvement projects.

- 3.2.4 There is however a more mature market for larger scale improvement and modernisation of social rented homes, where the ability to use economies of scale allows individual or groups of social landlords to optimise quality and value from the supply chain using different types of procurement frameworks and Dynamic Purchasing Systems (DPS). Low level energy efficiency measures such as windows, doors, loft, and cavity insulation have been procured using such frameworks, but deeper retrofit works are starting to be reflected within these frameworks and indeed to have specific 'lots' dedicated to 'Whole House Retrofit' approaches.

- 3.2.5 Another challenge in describing and sizing this market is that the market segment that the proposed pilot is targeting, i.e., Whole House Retrofit to SAP B+ or higher, is very underdeveloped at any scale and in any tenure. Other than the limited 'Energiesprong'<sup>4</sup> examples that we are aware of, we found little evidence of large-scale retrofit projects having delivered homes to B+ or higher SAP rating. We note that several such schemes are planned but are still in design stage.

### 3.3 Potential / Need to Shape Market

---

<sup>4</sup> <https://energiesprong.org/>



- 3.3.1 The Government recognises the immaturity of this market and in recent years has introduced a 'carrot and stick' approach to stimulating the market, with minimum energy efficiency regulatory requirements introduced for rented accommodation and a series of new and enhanced government funding programmes, each aimed at stimulating different segments of the market.
- 3.3.2 These funding programmes include the Green Homes Grant voucher scheme (aimed at homeowners and which failed on several counts and was suspended within six months) and other more successful schemes aimed largely at fuel poor households including the Green Homes Grant Local Authority Delivery Schemes (GHG LAD) comprising of 3 phases including both private and social tenures; Home Upgrade Grant (HUG), mainly focussed on 'off gas grid' homes and Social Housing Decarbonisation Fund (SHDF), for social housing only. Meanwhile the fourth wave of the long running ECO scheme is being increased to a value of £1bn per annum.
- 3.3.3 As an example of the early status of these funding rounds, the BEIS GHG LAD scheme was introduced in 2020 and is therefore the most advanced in terms of delivery. Across the first 2 phases, to the end of January 2022, there had been 15,464 (13,210 LAD1+ 2254 LAD2) measures installed in 12,280 (10,412+1,868) households. To date, 38,229 (24,472 +13,757) households have been identified for funding under LAD Phase 1 and are expected to receive a measure. Of the installed measures, just over 3,000 have been for solid wall (external or internal) insulation, and 839 Heat pumps have been installed.
- 3.3.4 Following the 'Each Home Counts'<sup>5</sup> report in 2016 which looked at issues of poor quality and customer service in the energy efficiency market, the Government has introduced a new standards framework 'PAS 2035'<sup>6</sup> which provides a specification for the retrofit of domestic buildings, and details best practice guidance. Compliance with PAS 2035 is now a mandatory requirement for all government energy efficiency funding. TrustMark<sup>7</sup> has been set up as the new quality mark within this framework and is supported by an Industry Code of Conduct and a Consumer Charter. New retrofit roles have also been introduced within the PAS 2035 process, with clear responsibilities and accountabilities established, to ensure quality in retrofit design, installation, and in-use.
- 3.3.5 Whilst this new standards framework is reassuring and will help to build demand for products and services over time, it is likely to create further supply bottlenecks in the short term at least, as operatives undertake necessary training to be certified for specific roles.

## **4 Procurement Routes**

- 4.1 Local Partnerships have undertaken a high-level review of the available routes to market for delivery of the two business case options that will be tested during the pilot phase:

---

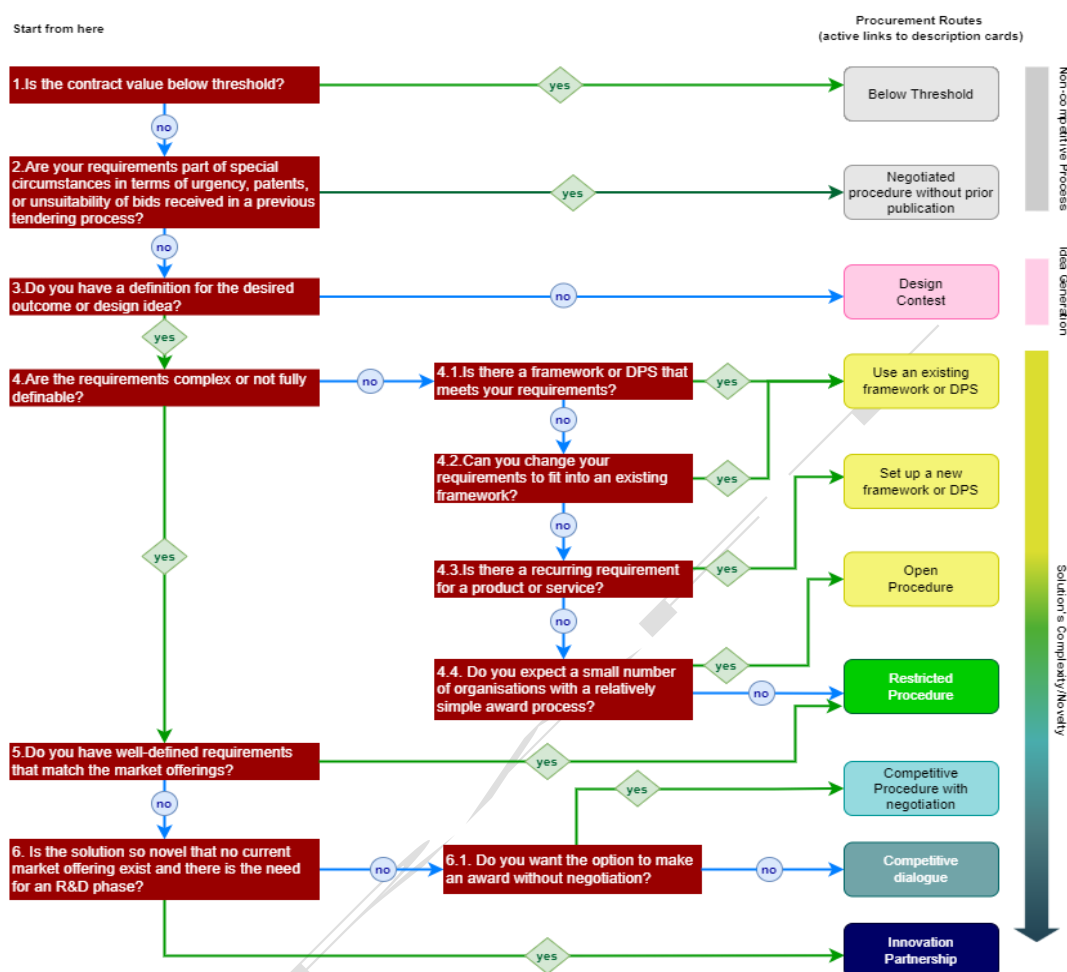
<sup>5</sup> <https://www.gov.uk/government/publications/each-home-counts-review-of-consumer-advice-protection-standards-and-enforcement-for-energy-efficiency-and-renewable-energy>

<sup>6</sup> <https://retrofitacademy.org/what-is-pas-2035/>

<sup>7</sup> <https://www.trustmark.org.uk/>

- Option 2: EPC B+<sup>8</sup>
- Option 3: EPC A<sup>9</sup>

4.2 The below procurement decision tree was used to inform the most appropriate route to market based upon the Council's requirements for the pilot.



4.3 As the Council can define their requirements and the desired outcomes for the project, Local Partnerships undertook a review of existing framework and DPSs available to assess their suitability.

#### 4.4 Identifying Options for Delivery of Retrofit Projects

4.4.1 Using the Energy Systems Catapult's 'Net Zero Go: Procurement Tool'<sup>10</sup>, along with additional wider market research, Local Partnerships have identified a mix of 33 frameworks and DPSs that exist to support the delivery of domestic retrofit.

4.4.2 To appraise these options in more detail, further desktop research and engagement with Framework owners has been undertaken to engage them on the suitability of their Agreements.

<sup>8</sup> using existing Housing 2022-2024 Capital programme Repairs and Maintenance contractual arrangements with Equans to deliver WHR to EPC B+ rating

<sup>9</sup> using the Energiesprong approach to WHR to deliver WHR to EPC A rating

<sup>10</sup> <https://es.catapult.org.uk/news/net-zero-go-launches/>

4.4.3 After due consideration the following 10 Framework and DPS Agreements were shortlisted:

- Crown Commercial Services: Heat Networks and Electricity Generation Assets DPS (HELGA)
- Nottingham City Council: Energy Efficient Retrofit Installers DPS
- Fusion21: Council's current Provision of R&M, Gas Servicing and Capital Improvement Works Programmes – East Region of the City Contract (Fusion 21 Framework - Internal and External Refurbishment - Lot 1A Housing)
- Fusion21: Decarbonisation Framework
- Greater London Authority: Retrofit Accelerator Homes Innovation Partnership
- Greater London Authority and Local Partnerships: National Energy Performance Contracting Framework (RE: FIT)
- Pagabo: Refit and Refurbishment Framework
- Pagabo: Major Works Framework
- Places for People Group: Major Projects Framework 2
- Procurement for Housing (PfH): Capital Works and Associated Services

4.4.4 All of the above are Official Journal of the European Union (OJEU) compliant, which is necessary as the project exceeds the OJEU cost threshold and by extension The Public Contracts Regulations 2015.

4.4.5 Suitable options have then been appraised against a clear set of approved assessment criteria as detailed below.

## 5 Sourcing Strategy

5.1 As more than one route can be adopted to achieve the Council's aims and the requirements of the pilot, CPS have worked with Local Partnerships and the wider project team to develop assessment criteria, against which to assess and evaluate the suitability of existing Frameworks and DPSs. This criterion included, but was not limited to:

- Ownership of the Framework
- Scope of the Framework and it's suitability for the pilot
- How performance is or can be managed under the Framework
- The procurement methods availability and the associated impacts for BCC
- Fee levels and provision of/ access to support
- The supplier base – the range of providers and their suitability for the pilot
- The level of Framework use
- The cost model employed by the Framework
- Added value components

5.2 A detailed overview including the strengths and weaknesses of each suitable sourcing options, against the criteria above, is detailed in the attached 'Procurement Framework for Domestic Retrofit' file:



Procurement  
Frameworks for Dom

5.3 Following detailed evaluation of all of the available options based upon the criteria above, CPS and Local Partnerships identified the following most suitable procurement routes for the delivery of EPC B+ and EPC A as follows:

5.3.1 EPC B+ - Procurement Option 1:

Council's Provision of R&M, Gas Servicing and Capital Improvement Works Programmes Contract – East Region of the City (2yr contract from April 2022 – 2024. Awarded via the Fusion 21 Framework - Internal and External Refurbishment - Lot 1A: Housing)

Strengths	Weaknesses
<p><b>Ownership:</b> Birmingham City Council</p> <p><b>Cost Model:</b> Bespoke Open Book</p> <p><b>Level of use:</b> This contract is currently being utilised by the Council for housing repairs and maintenance, gas servicing and capital works programmes activity in the North, East &amp; West regions of the City delivered in partnership with Equans.</p> <p><b>Fees:</b> 0.5%</p> <p><b>Added Value:</b> For every £100k of spend BCC would receive social value credits which can be used in many ways.</p> <p><b>Scope:</b> The existing contract includes requirement that the Contractor/Supplier will assist the Member and the other Project Participants in exploring how the environmental performance and sustainability of the Works/Services might be improved, and environmental impact reduced.</p> <p><b>Level of Support:</b> Full Contract Management Support</p> <p><b>Supplier Base:</b> Allows BCC to compliantly access their existing strategic partner Equans for delivery of the services</p>	<p><b>Level of use:</b> Careful resource and work package allocation management must be adopted to ensure that the pilot will not create any operational / delivery risk to the Council's existing capital programme requirements.</p>

5.3.2 EPC B+ - Procurement Option 2:

Fusion21 Decarbonisation Framework



The Decarbonisation Framework was created by Fusion21, a social enterprise, experienced and specialising in the setting up and management of public sector procurement frameworks.

The Fusion21 Decarbonisation Framework was launched in January 2022 for the provision of decarbonisation works and services for use by current and prospective Members. The Framework is split into two Lots:

- Lot 1 - Whole House Decarbonisation
- Lot 2 - Decarbonisation of Public and Education Buildings

Strengths	Weaknesses
<p><b>Ownership:</b> Social Enterprise</p> <p><b>Scope:</b> The Framework has been principally designed to support delivery of whole house retrofit.</p> <p><b>Supplier base:</b> Regional Lots/ good range of suppliers with specific sector expertise, including BCC's existing strategic partner.</p> <p><b>Procurement method:</b> Birmingham are an existing member of Fusion 21 and currently use the Construction Works and Improvements Framework to deliver their repairs and maintenance contract. Opportunity for direct award and mini competition.</p> <p><b>Level of use:</b> Although untested, there is a pipeline of 50 authorities since launch in Jan 2022 with 30 authorities who have confirmed their plans to use it.</p> <p><b>Performance guarantees:</b> Works approach based upon 'whole house' retrofit measures to PAS2035:2019 standards (Not Guaranteed).</p> <p><b>Cost model:</b> Schedule of rates for a large range of tasks focussed on decarbonisation activities.</p> <p><b>Level of support:</b> Supported framework</p> <p><b>Added value:</b> For every £100k of spend BCC would receive social value credits which can be used in many ways.</p>	<p><b>Level of use:</b> New Framework means that it is untested at present.</p> <p><b>Performance Guarantees:</b> No performance guarantee built in. These would need to be drafted and tested with providers to assess their appetite to bid.</p> <p><b>Procurement method:</b> Direct report award can be supported by Fusion21. Direct award would need to mirror the Framework terms and conditions and pricing. If there was a variance then the contract would need to be offered to the highest-ranking supplier on the framework first and then through the rankings if they decline the opportunity.</p> <p><b>Fees:</b> Potential for high level of framework fee.</p> <p><b>Procurement method:</b> Direct procurement, without competition, could create value for money issues. Timescales for direct award vs mini competition appear unrealistic.</p>

When the framework was launched in January 2022, there were 20 providers appointed to the Framework, including the Council's existing strategic partner Engie Regeneration Limited (now Equans).

There is the option to direct award to a single provider (providing all required criteria is met) or undertake further mini competition under the Framework. The pros and cons of these options are outlined below:

Approach	Strengths	Weaknesses
Mini Competition	<p>Good range of suppliers with sector specific experience.</p> <p>Mini competition would allow BCC to:</p> <ul style="list-style-type: none"> <li>• Test the market and assess and range of services</li> <li>• Chose the supplier that offers the best value for money</li> <li>• Assess market appetite in advance of programme rollout</li> </ul>	<p>Indicative timescales of 3 months for appointment.</p> <p>Soft market testing may be required to assess levels of interest.</p> <p>Potential for high number of bidders.</p>
Direct Award	<p>Indicative timescales of 3 weeks for procurement.</p> <p>A direct award report can be produced by Fusion21, but BCC would need to satisfy itself of the justification for this approach.</p> <p>Birmingham could select their pre-existing strategic partner, if required.</p>	<p>Timescales for direct award appear optimistic.</p> <p>A specification will be required for either mini-competition or direct award.</p> <p>Direct award would need to mirror the Framework terms and conditions and pricing. If there was a variance, then the contract would need to be offered to the highest-ranking supplier on the framework first and then through the rankings if they decline the opportunity.</p> <p>Direct procurement, without competition, could create value for money issues.</p>

### 5.3.3 EPC A - Procurement Option 1:

## Retrofit Accelerator Homes Innovation Partnership (RAHIP)

RAHIP was created by the GLA under an Innovation Partnership<sup>11</sup>, which aims to provide a scaleable, performance assured standard whole house net zero energy solution for retrofitting homes at an economic price point.

The GLA identified the need for an innovative solution that could not be met by what was available on the market.

RAHIP uses the Energiesprong approach, a whole house approach to retrofit whereby homes are fully insulated using offsite manufactured wall and roof panels in conjunction pre-assembled 'energy pods' providing low-carbon, high efficiency heating, hot water and renewable energy production delivered. The end result is homes that are brought up to a minimum net-zero energy standard, creating warmer, more desirable places to live.

Strengths	Weaknesses
<p><b>Ownership:</b> Public Sector led</p> <p><b>Cost Model:</b> Open book cost model with Gross Maximum Price (GMP) established early the procurement process to achieve a high level of cost certainty.</p> <p><b>Level of use:</b> Well tested in the Netherlands and being piloted by a limited but growing number of authorities in the UK.</p> <p><b>Fees:</b> Low fee levels compared to other options. A target cost is agreed at each stage of the development process to support cost reduction.</p> <p><b>Added Value:</b> Collaborative approach to whole house retrofit, driving innovation in the sector and sharing lessons learnt across the wider sector.</p> <p><b>Level of Support:</b> Supported framework</p> <p><b>Supplier Base:</b> Solution Providers are pre-qualified and understand the requirements of retrofit projects and the Energiesprong requirements, including the Council's existing strategic partner. Low to medium risk of poor response to Tender.</p> <p><b>Performance guarantees:</b> One of the only tested approaches to delivery of whole house retrofit with performance guarantees and remedial actions for underperformance (via the Energiesprong model). 10-year performance guarantee and a pre-existing option for a tenant comfort plan. Solution</p>	<p><b>Scope:</b> Exclusively for the delivery of the Energiesprong whole house retrofit model. Not appropriate for lower level savings options.</p> <p><b>Level of Use:</b> Innovation Partnership is in the developmental stage and has not been tested at scale by individual authorities.</p> <p><b>Supplier Base:</b> Although pre-approved, there is a limited number of suppliers who are developing innovative approach to whole house retrofit. Providers are accessed on a rotational basis, therefore there is no option for the Council to select a partner. A partner will be selected for them.</p>

<sup>11</sup> <https://www.legislation.gov.uk/uksi/2015/102/regulation/31/made>

provider is liable for underperformance charge if performance and maintenance levels are not met (capped at 15%). Over the Guaranteed Maximum Price (GMP) savings are shared between the tenant and the solutions provide (Up to 10%)	
---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	--

It should be noted that the GLA intend to launch a National Framework in 2023 to build upon the developmental process currently being utilised by authorities under the Innovation Partnership.

### Framework Evaluation and Selection Criteria

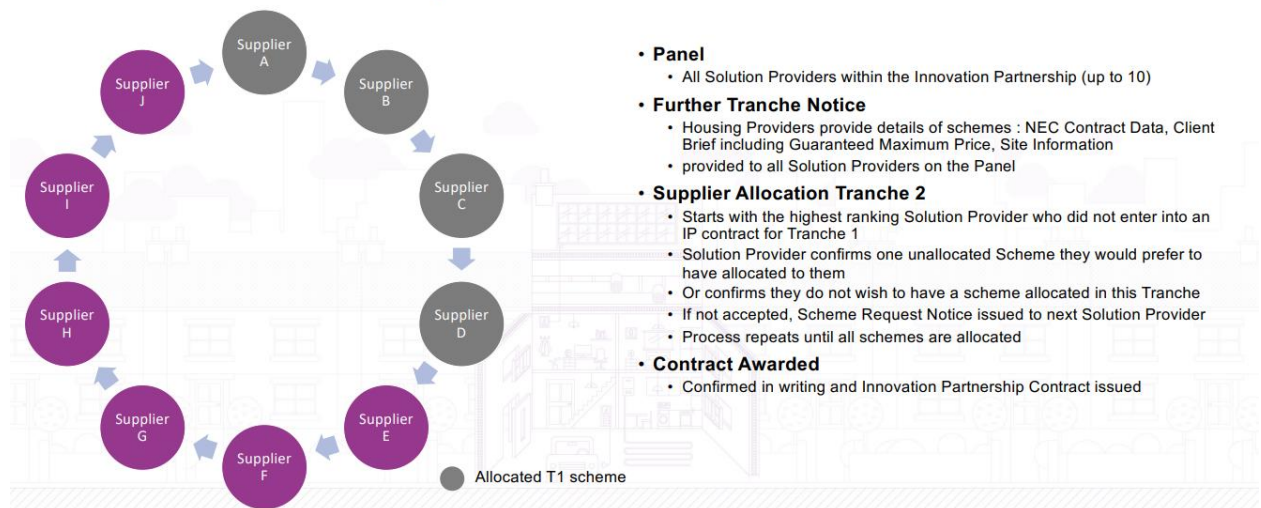
A panel of 4 solution providers have been procured by the GLA, available for projects delivering phased works through until 2030. The four providers are:

- Osborne – Carbon Neutral Solutions
- United Living Property Services
- Mi Space (now Bell Group) \*
- Engie (now Equans)

*\*Mi Space do not operate in the Midlands area and would therefore, not be considered under this framework option.*

Contracts are awarded via the direct award process and accessed on a rotational 'Carousel' basis. This means that there is no option for the Council to select a preferred delivery partner, and therefore a delivery partner will be selected for them. If the delivery partner does not accept the service, then it is offered to the next provider until a suitable delivery partner is accepted. It should be noted that the landlord also has the option to reject the allocated solution provider.

## Tranche 1 + Subsequent Scheme Allocation



All providers have been vetted to ensure sufficient experience and suitability to participate in the Innovation Partnerships delivery of services under this framework agreement.

## 6 Recommended Procurement Routes



6.1 Following final evaluations and consultation with the wider project team, CPS and Local Partnerships have identified the following procurement routes as the most appropriate for the delivery of this pilot:

- **EPC B+:**  
Council's Provision of R&M, Gas Servicing and Capital Improvement Works Programmes Contract – East Region of the City (2yr contract from April 2022 – 2024. Awarded via the Fusion 21 Framework - Internal and External Refurbishment - Lot 1A: Housing)
- **EPC A:**  
Retrofit Accelerator Homes Innovation Partnership (RAHIP) Framework

## **7 Forms of Contract**

7.1 EPC B+: Council's Provision of R&M, Gas Servicing and Capital Improvement Works Programmes East Region of the City (bespoke contract).

The rationale for the use of the Council's existing terms & conditions for the delivery of these works is that it has been created for the delivery of the Council's Capital Works Programme and therefore, provides sufficient flexibility to accommodate the pilot's EPC B+ scope and specification requirements.

The council will need to develop a clear contract variation for delivery of EPC B+, including performance requirements at both the individual and portfolio level, and rights and remedies to protect the Council, ensure good performance and assess the commercial consequences of underperformance (beyond existing suspension and termination rights).

7.2 EPC A: NEC4

RAHIP's rationale and preference for the use of the NEC4 Framework Contract suite of documents is that they have been created for a collaborative delivery model such as Innovation Partnership led projects and therefore, with supplementary Z clause amendments, provides sufficient flexibility to accommodate the Retrofit Accelerator Programme's requirement for a framework structure and scheme-based delivery.

### **7.3 Service Delivery Management**

#### **7.3.1 Contract Management**

All contractual arrangements in relation to the delivery of this project will be managed operationally by the Head of Service and the Asset Management and Maintenance Division of City Housing.

#### **7.3.2 Performance Management**

Performance management measures will form part of the contract including the delivery of the agreed Social Value outcomes.

The council will need to:

- Work to understand the council's requirements and define within the contract terms
- Detail the performance framework and specific performance requirements
- Define the measurement approach for individual properties and pilot portfolio

- Identify performance requirements for wider Council specific objectives, including social value and information gathering
- Develop clear rights and remedies to protect the Council, ensure good performance and assess the commercial consequences of underperformance, beyond termination and suspension of a contractor.

## **8 Alternative Options Considered and Recommended Proposal**

- 8.1 To do nothing – this is not an option as this would leave the Council without any formal contractual arrangements, nor any ability to trial retrofit interventions to reduce the carbon emissions from the Housing stock. This would lead to only carrying out standard BAU activities with repairs and maintenance undertaken without an EPC target - leading to multiple interventions over many years for individual properties?
- 8.2 Alternative procurement options are detailed in paragraph 5.2.

## **9 Consultation**

### **9.1 Internal**

The Cabinet Member for Housing have been consulted on the contents of this report.

Officers from Finance, CPS and Legal and Governance have been involved in the preparation of this report.

### **9.2 External**

This is covered in the Cabinet Report dated 4 July 2022.

## **10 Risk Management**

- 10.1 The CPS approach is to follow the Council Risk Management Methodology and the Procurement Team is responsible for local risk management. CPS maintains a risk management register and documentation relevant for each contract.
- 10.2 The risk register for the service will be managed at project level by the Project Manager and at City Housing Transformation Programme level by the Housing Management / Capital Investment & Repairs Transformation Programme, City Housing Transformation Programme Director and Programme Board with arrangements being put in place to ensure commercial and operational risks are appropriately mitigated.
- 10.3 Risk management methodology will follow the City Council's standard approach as agreed with the Corporate PMO.

## **11 Compliance Issues:**

- 11.1 The proposals within this report will make a direct contribution to both Corporate and Directorate outcomes.
- 11.2 Please refer to the Enhanced Business Case (EBC), Section B – Strategic Case - B4 - Social Value outcomes.
- 11.3 The payment of the Real Living Wage (RLW) will apply throughout the contract period. This will require employees of the potential suppliers engaged on this contract to be paid the RLW.

## **12 Legal Implications**

- 12.1 The proposed allocation of work is consistent with the effective management of the Council's housing stock under Part II Housing Act 1985.
- 12.2 Legal Services have been consulted and have worked with CPS in relation to the recommended procurement routes for the delivery of EPC B+ and EPC A.

## **13 Financial Implications**

- 13.1 Please refer to the Enhanced Business Case (EBC), Section E – Financial Case

## **14 Procurement Implications**

- 14.1 This report concerns a procurement strategy and any implications are detailed throughout the report.

## **15 Human Resources Implications**

- 15.1 The procurement exercise and the subsequent contract management of the contract will be undertaken by Council employees.

## **16 Public Sector Equality Duty**

- 16.1 Regarding section 149 of the Equality Act 2010, the proposed operating model has no practices that could be considered unfair, unlawful or discriminatory within this context. The Equality Assessment (EA) that reflects the changes of this proposal will be monitored and re-evaluated at the end of consultation

## **17 Appendices**

- 17.1 N/A

## Appendix 4

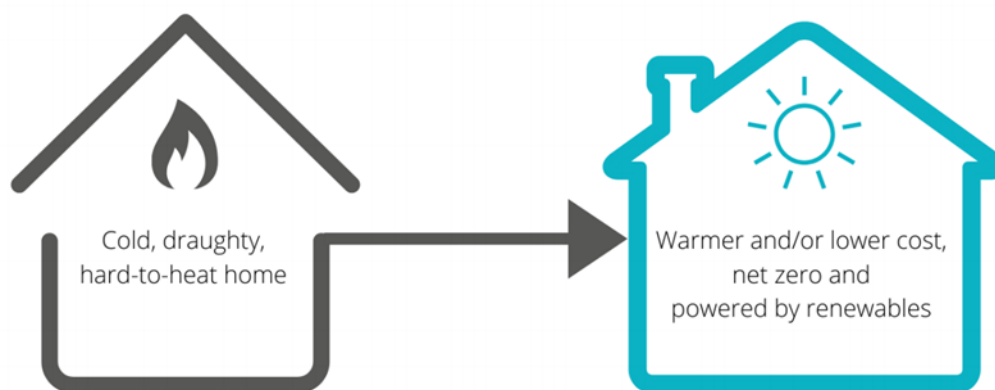
### Whole House Retrofit Pilot

#### Energiesprong Simple Comfort Plan



#### What is the “Comfort Plan”?

The 'Comfort Plan' provides a package of services to tenants which will improve the energy efficiency their home, enabling tenants to warm their homes, have access to hot water and power electrical appliances all with significantly reduced energy consumption.



The interventions and upgrades provided to the tenant's property typically includes:

- Insulation of walls, wrapping the outside of the property
- New windows and doors
- New roof cartridge with integrated photovoltaic panels and energy production equipment
- Heat pump and heat production equipment
- Digital monitoring equipment and sensors
- Mechanical air ventilation system and heat recovery and heat recovery

The gas supply is removed, and any gas appliances replaced with electrical appliances.

#### Guaranteed levels of comfort for tenants

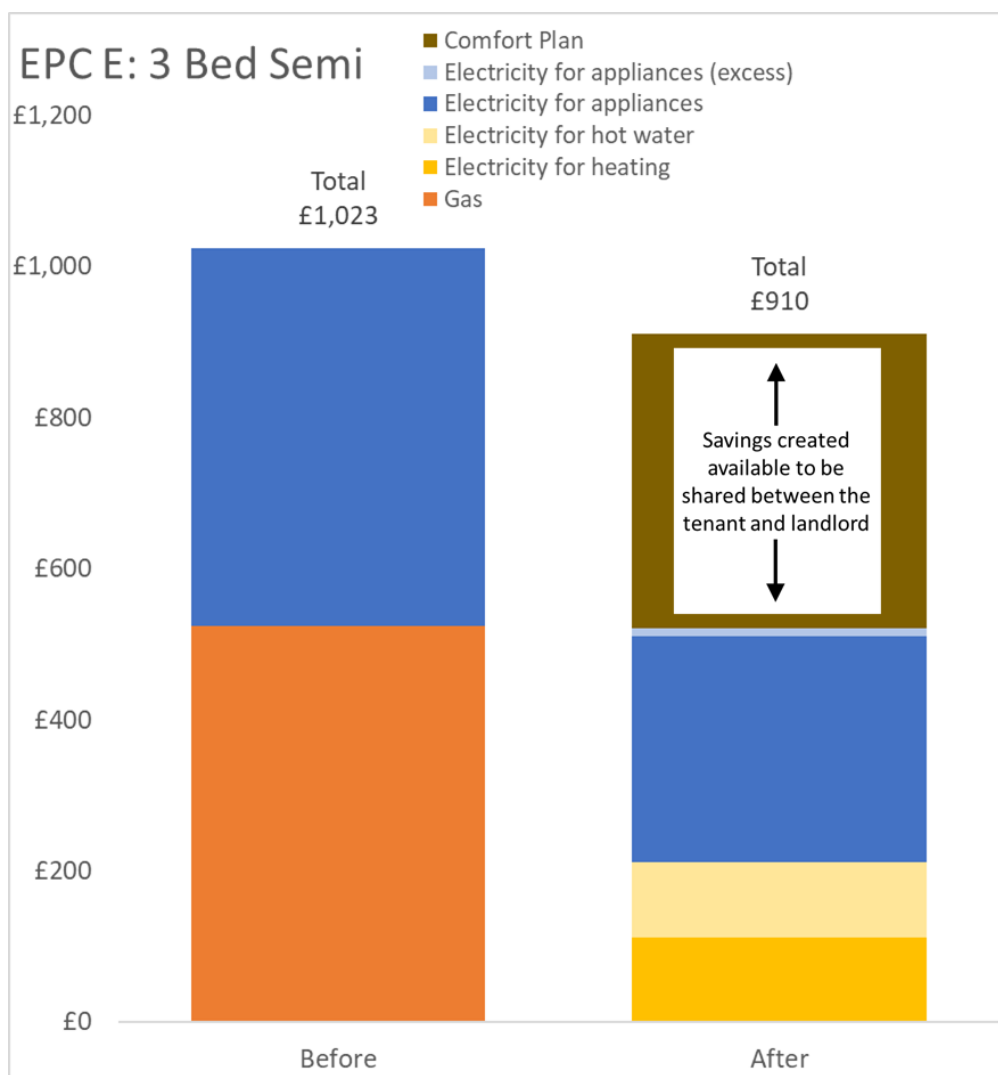
Under the Comfort Plan package, the provider will ensure that tenants receive a minimum level of standards in their homes for heating, hot water and electricity for



your appliances. Based on a family living in a typical 3-bedroom semi these are set at:

Criteria	Specification
Space heating in Your Home	<p>The Comfort Plan will meet the following minimum standards for space heating:</p> <ul style="list-style-type: none"> <li>✓ 21°C in living room when outside temperature is -5°C</li> <li>✓ A demand temperature of 21°C in the living area and 18°C elsewhere</li> <li>✓ A weekday heating pattern of 2 hr on, 7 hr off, 7 hr on, 8 hr off</li> <li>✓ A weekend heating pattern of 16 hr on, 8 hr off.</li> </ul>
Hot water in Your Home	<p>The Comfort Plan will meet the following minimum standards for hot water:</p> <ul style="list-style-type: none"> <li>✓ capable of delivering 200 litres &gt;45°C in one hour;</li> <li>✓ making available 140 litres per day.</li> </ul>
Electricity for Your appliances	2,300 kWh per year will also be available for your appliances.

The following diagram illustrates the potential before and after effect on the annual energy bill for a tenant living in a 3 bedroom semi-detached property - rated before at EPC E and after Energiesprong retrofit, EPC A (based on 2019 pricing):



The total annual energy bill for the tenant for gas and electricity is estimated at £1,023. After the Energiesprong whole house retrofit, upgrading the property to EPC A the total energy bill for heating, water and appliances is projected to drop to around £503 – a saving of £520 p.a. or reduction of 50%.

This saving of £520 p.a (£10 p.w) arises as a result of a combination of the upgrade investment by the landlord and tenants' management of their new living environment.

The Comfort Plan is a share of the savings made paid by the tenant to the landlord. It is set at a level by the landlord, so the tenant makes an overall saving. The sharing of the saving contributes to the landlord's ability to extend funding and investment in more retrofitting of the housing stock moving forward.



## Appendix 5

### Whole House Retrofit Pilot

### Energiesprong Overview



#### The Energiesprong Approach

Energiesprong UK (ESUK) is a not-for-profit market development organisation aimed at creating a mass market for desirable, affordable Net Zero Energy (NZE) whole-house retrofit and new build.

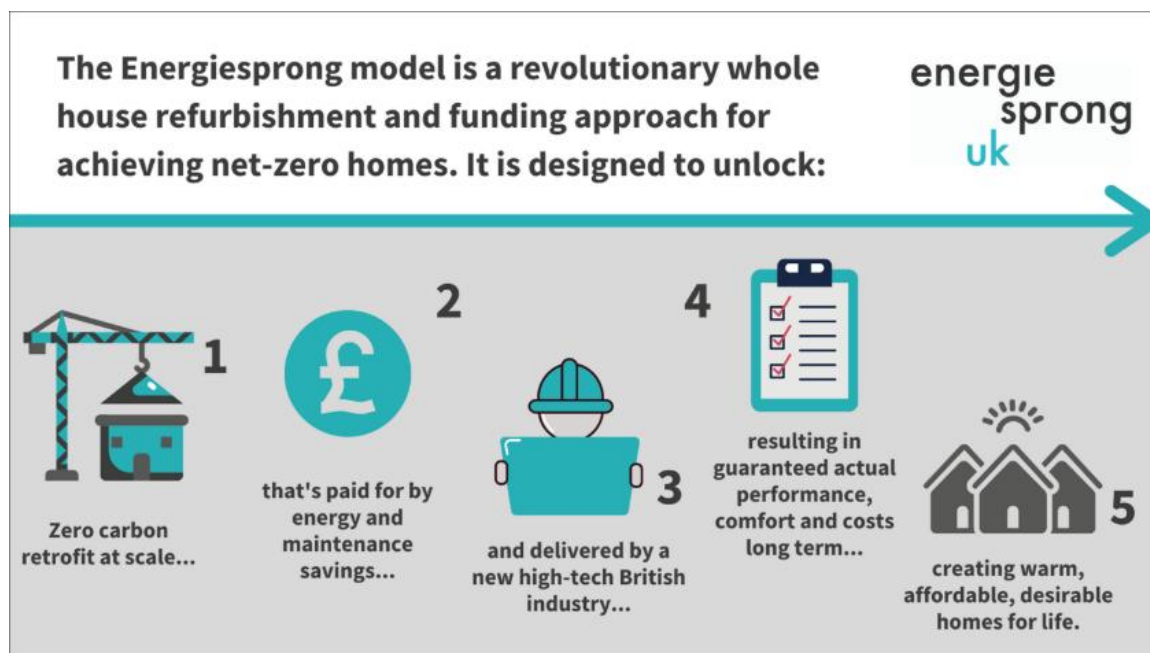
Energiesprong (ES) uses a proven approach to completing whole house retrofit to Net Zero in one go. Over 6,500 homes have been delivered in the Netherlands, [applewebdata://D71419C2-EEFB-492B-95E4-0671F904196A/](https://applewebdata://D71419C2-EEFB-492B-95E4-0671F904196A/) - <sup>ftn1</sup> and four pilot programmes including 165 homes, six social landlords and four solution providers have been delivered in the UK. The UK market is now being strategically scaled up: a further 1,500+ homes across nine social landlords are under contract in the UK procured via the Retrofit Accelerator Homes Innovation Partnership (RAHIP<sup>1</sup>).

The NZE retrofit involves taking a whole house approach, including maximising the fabric improvements available to a given property, as well as the addition of PV solar on the roof and an energy module which includes the PV inverter, a heat pump, ventilation, smart monitoring systems and often battery storage. The ES approach also incentivises maximising the use of modern methods of construction such as off-site construction, to reduce time and disruption on site, and to build the supply chain capability to deliver solutions that will support developing scalable and sustainable solutions to retrofit and providing wider green economy opportunities. This is illustrated in the diagram below:

---

<sup>1</sup> RAHIP is a new OJEU compliant public procurement mechanism sponsored by the Greater London Authority (GLA)





The ES approach has been designed to unlock the significant benefits of NZE retrofit for social landlords such as BCC, it's residents, communities, and the local economy over the long term.

Below is an example of Keswick St Homes in Nottingham before and after the Energiesprong retrofit:



### Benefits to BCC residents and community

- Providing residents with warmer, nicer, quieter homes to live in – with lower, more predictable energy bills and protection from price rises over time.
- The Energiesprong promise guarantees comfort every day for an affordable total cost, including heat, hot water, plug power, lighting and appliances. This

comfort bundle is backed up by a guarantee on the energy performance (kWh) of the retrofit by the solution provider.

- It improves the health of residents by reducing issues associated with damp and mould.
- New approaches to delivering the works are designed to complete the works in a shorter time, with less disruption and residents able to remain in their homes during the works.
- It provides greater control over their energy use, with better in-home controls and monitoring.
- By taking a whole house or whole block approach it provides older properties with new modern look, supporting the wider regeneration of an area that builds a sense of pride in the local community.

### **Benefits to BCC**

- NZE in one go is an ambitious approach to decarbonising the housing stock and can be a key contributor to achieving net zero by 2030
- Supports optimisation of planned asset management with breadth of interventions extending asset life
- The design and works are underpinned with a contractual performance guarantee, on the works, energy performance and maintenance costs over the long term.
- It will maximise asset values and reduce maintenance costs, with smart whole house monitoring offering the opportunity to digitalise asset management to provide improved stock data.
- It avoids duplication of costs on the enabling works (e.g. survey's, scaffolding, services) that would otherwise be incurred by phasing the works needed to get to NZE through a series of interventions.
- A part of the significant savings generated by NZE is shared with the BCC via comfort plan payments. The comfort charge is an amount charged by BCC to the tenant representing a share of the savings made / costs avoided by the tenant.
- The ES model will allow BCC to develop new cash flows via the comfort plan that can be used to support a long-term strategic approach to scaling up the decarbonisation of all homes in the city.
- It creates a new market for modern methods of construction which have the greatest potential to scale by bringing the cost and time to retrofit down. BCC is in a particularly good position to do this because of the large numbers of properties that are the same archetype, allowing for a more rapid scaling up.

### **Benefits to the supply chain and local economy**

- Delivering to an ES standard using RAHIP provides supply chain partners with the guarantee of scale needed to invest and innovate to develop new modern methods of construction. It does this in a staged way offering higher per property budgets to prototype and pilot, with cost reductions being delivered in the later stages as the volume of homes is increased.
- Increasing numbers of local jobs and training opportunities are generated through the prototype, pilot and commercialisation phases.

- There is also the opportunity to catalyse the development of localised off site construction manufacturing hubs, which could provide new retrofit solutions to both BCC and neighbouring areas if sufficient pipeline to scale was provided.

To take advantage of these benefits BCC needs to procure a new type of product, which is a design, build and guarantee retrofit. The guarantee, element places a requirement on the solution provider to guarantee the energy performance and ongoing maintenance costs for at least 10 years. This is supported by the solution provider providing and agreeing a fully costed plan with BCC for 30 years.

At this stage of maturity, the market is supporting a 10-year guarantee. As the market matures and service providers gain more confidence and knowledge the target is to standardise around a 30-year guarantee. It is this guarantee of performance that supports the 30-year business case that can now include an investment envelope made up of income and savings:

- Aggregating planned routine and maintenance and major repairs over a 30-year period
- Introducing a 'Comfort Plan' for tenants under which they pay the housing provider (the Council) a share of energy savings made / energy costs avoided.
- Other revenue streams as they become available, for example export tariffs, time of use tariffs and possibly ECO.

## **Performance Guarantees**

The Performance Management Framework and Performance Guarantee Agreement are key to ensuring both BCC and its tenants receive the benefits promised. In designing an ES NZE retrofit the solution provider is guaranteeing:

- Planned maintenance costs of the retrofit improvement works over 10 years
- Equipment replacement cycles and costs over 10 years
- Energy performance (kW) over 10 years assuming the residents operate their homes within the agreed ES comfort bundle.

There are 2 performance guarantee options available under the ES model. Either an Operations and Management Performance Guarantee (OMPA) or a Performance Guarantee Agreement (PGA).

Under the OMPA the solution provider who delivers the retrofit also provides the ongoing operational maintenance under a separate contract. They are liable for the usual equipment or installation failures, however in addition to that they are contractually liable for maintenance or replacement costs that exceed the agreed plan over the first 10 years.

The solution provider is also liable to refund energy imports that exceed the guaranteed net energy import level agreed, subject to resident usage being within the agreed range.

Under the PGA the solution provider is still liable for maintenance costs and equipment replacement costs that exceed the agreed plan over the first 10 years, as

well as the excess net export. The key difference is the maintenance is delivered via a separate 3<sup>rd</sup> party contract.

Given the importance of the performance guarantees to ensuring both BCC and its tenants realise the benefits of the retrofit the ES performance management framework sets out the comprehensive performance verification measures required at the point of handover and commissioning. The performance guarantee agreements also outline the regular performance measures and reporting required over time.

### **Retrofit Accelerator Homes – Innovation Partnership (RAHIP) Framework**

RAHIP is a new OJEU compliant public procurement mechanism designed to drive innovation, cost reduction and scaling up and delivery of whole house net zero retrofit using the ES approach.

A panel of 4 solution providers<sup>2</sup> have been procured by the Greater London Authority (GLA). The Innovation Partnership Framework is available for projects delivering phased works through until 2030.

RAHIP allows suppliers to develop new products by providing an increasing pipeline through phased contracts, with progression to the next phase contingent on the supplier meeting specified performance targets. Cost is one of the key performance targets, and so cost reduction steps are built into the procurement and delivery of the scheme.

The aim is to drive down the cost of whole home retrofit with each phase – from c £85K in stage 2 to c £55K in stage 4. At the end of phase 4 the objective is that the project can create a framework involving all the providers who have passed the four phases with a proven product. This framework will then be available to all social landlords and can create a mass market for the large scale roll out of retrofit.

### **Innovation Partnership Procedure**

Assessment of UK market development of Energiesprong shows that using traditional low volume project by project procurement has not created the volume to sufficiently stimulate the supply market or drive the economies of scale necessary to achieve an Economic Price Point.

The GLA is helping to create scale and longevity in the market for Energiesprong retrofit by enabling a number of Housing Providers to aggregate their Energiesprong projects into a structured development procurement process through an IP. This is with the aim of stimulating competition in the market and fostering investment in solution innovation, industrialisation and digitisation that will enable the Solution Providers to offer Energiesprong standard retrofit at an Economic Price Point.

---

<sup>2</sup> United Living, Equans, Osborne Group, MIDAS Group



## Innovation Partnership Developmental Process

The Innovation Partnership (IP) Developmental Process runs in Stages as set out in Figure 1 below with the projects delivered in Stages.

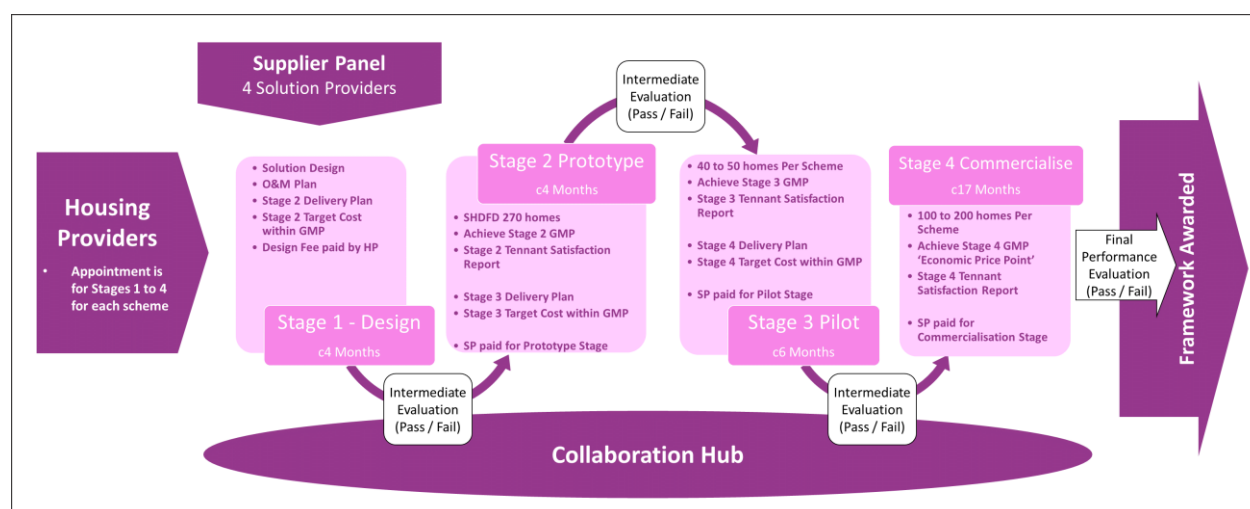


Figure 1: IP Developmental Process

Contracts for each scheme will be put in place to implement the IP and to provide for all four Stages of the IP; design (Stage One), prototype (Stage Two), pilot (Stage Three) and commercialisation (Stage Four).

At the end of each Stage, the *Solutions Provider's* performance is assessed against the Performance Table. If the *Solutions Provider* passes the assessment at the end of each of Stages One to Three and the other conditions stated in conditions of contract are met, the *Client* issues a notice to proceed with the project to the next stage, in the form as set out in Schedule 15. If the *Solution Provider* fails to pass the assessment for that Stage they will not progress the project to the next Stage of the IP and they will not be issued with a notice to proceed by the *Client*. If the *Solution Provider* is successful in all four Stages such that the Framework Conditions are satisfied, then the GLA will serve a Framework Commencement Notice in respect of the Framework Agreement.

## Comfort Plan

At the heart of the ES approach is the household 'Comfort Plan'. The Comfort Plan is an agreement between BCC and the tenant. The plan establishes a fixed kWh/year and comfort charge for guaranteed 'comfort' outcomes – certain levels of heating, hot water and electricity use.

The Comfort Plan charge delivers warm rooms every day, enough daily hot water for household use, and enough power for normal use of plugs, appliances and lighting. Residents can choose to use more than their allowance, by paying their utility company for the additional units of electricity used as they will still have connection to residual supply.

The aim is that the combined residual electricity bill and Comfort Plan charge will be less than the tenant's current energy bills. BCC has significant flexibility in the way the Comfort Plan charging level is set. There are also options to provide additional discounts or payment holidays to support vulnerable or fuel poor residents.

Once proven via the WHR pilot BCC will be able to extend this approach to apply elsewhere in the city, which can provide new cash flows to invest in scaling up the transition to net zero by 2030.

As the Comfort Plan would form a new contract between BCC and tenants, BCC can choose the level of savings contribution – the solar PV contribution also helps to maximise the energy savings for tenants as a free of charge source of energy.

The Comfort Plan charge can be applied through a comfort plan agreement (template legal agreement developed with specialist legal advice via the RAHIP programme)



**Birmingham 3 Cities Whole House Retrofit Pilot  
Ward Councillors Consultation Responses**

<b>Stakeholder</b>	<b>Ward</b>	<b>Site (if report relates to multi sites)</b>	<b>Response to consultation</b>
Cllr Donaldson	Bromford & Hodge Hill		<p>I welcome the green energy interventions to 300 properties in my ward. I support the recommendations and note there will be extensive consultations with residents.</p> <p>The project will provide sustainable green energy for generations and subsidise their energy costs at a time of a cost of living crisis in the part of the city that has a high fuel poverty rate.</p> <p>Received: Monday 4<sup>th</sup> July 2022</p>
Cllr Mahmood	Bromford & Hodge Hill		Supported pilot.





## Public Report

## Birmingham City Council

## Report to Cabinet

26 July 2022



**Subject:** **Balsall Heath Community Governance Review**

**Report of:** Robert James, Strategic Director of City Operations and  
Satinder Sahota, Acting City Solicitor and Monitoring Officer

**Relevant Cabinet Member:** The Leader of the Council

**Relevant O & S Chair(s):** Cllr Mohammed Idrees, Chair of Homes and Neighbourhoods  
O&S Committee

**Report author:** Tony Smith, tony.smith@birmingham.gov.uk

Are specific wards affected?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No – All wards affected
If yes, name(s) of ward(s): Balsall Heath West, Sparkbrook and Balsall Heath East		
Is this a key decision?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No
If relevant, add Forward Plan Reference:		
Is the decision eligible for call-in?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No
Does the report contain confidential or exempt information?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
If relevant, provide exempt information paragraph number or reason if confidential :		

## 1 Executive Summary

- 1.1 This report presents the provisional conclusions of the Community Governance Review on the proposed creation of a new neighbourhood council in the Balsall Heath area of the city and makes consequent recommendations in line with the council's agreed process on the creation of parish councils. The review was carried out following the decision of Cabinet in November 2021 and followed the terms of reference reported to that meeting.

- 1.2 The report of the Review is attached at Appendix 1. It provides a summary of the proposal including the boundary, warding and electoral arrangements; details of the consultation carried out; an assessment of how the proposal would enhance community cohesion and identity in the area and provide for efficient and effective governance and a summary of the feedback from the consultation.
- 1.3 Officers have concluded that the evidence gathered in the review and the feedback from consultation are enough to justify moving to the next stage of consultation and holding a consultative ballot of all electors in the area.

## **2 Recommendations**

- 2.1 Cabinet is recommended to:
  - Accept the recommendation of the CGR report that the process should move to the next stage (further engagement with the community and a consultative ballot)
  - Approve the holding of a consultative ballot of all electors in the area covered by the proposed neighbourhood council, in accordance with the policy approved by Cabinet in May 2021.
  - Receive a further report following the ballot so that the result can be considered, and recommendations made to a meeting of the City Council if appropriate.

## **3 Background**

- 3.1 The City Council published a white paper, Working Together in Birmingham's Neighbourhoods in 2019 which included a commitment to work with local community groups who were interested in creating new parish (neighbourhood) councils in their area.
- 3.2 Since then a small number of places have expressed an interest and these are being taken forward at different speeds. A group of interested citizens in Balsall Heath have started a campaign for such a council in the area covered by the Balsall Heath Neighbourhood Plan.
- 3.3 Cabinet approved a policy statement on the process for creating new parish (neighbourhood) councils within the city in May 2021. In accordance with this policy, and relevant legislation and statutory guidance, Cabinet decided to conduct a Community Governance Review (CGR) in November 2021. The CGR was formally initiated in January 2022 and, in accordance with the above policy statement, the main phase of the review was completed by the end of June (i.e. within the six months specified in the policy).
- 3.4 The CGR has been conducted in accordance with statutory guidance and the terms of reference set out in the November 2021 Cabinet report. The policy statement now requires a report to Cabinet with recommendations about the next steps and that is the purpose of this report.
- 3.5 Statutory guidance requires that a CGR considers two main issues when assessing proposals for changes in local governance: a) does the proposal reflect the identities and interests of communities in the area and b) would the proposal provide effective and

convenient governance of the area. The first of these includes issues such as community cohesion, equalities and identities. The second includes factors such as size, population and the management of elections.

- 3.6 The next stage in the process set out in the council's policy for creating new parish councils would be further engagement with the community and information provision followed by a consultative ballot of all electors in the area to make a final decision on whether they wish to have a new council.
- 3.7 The proponents of a new council have decided that it would be called a neighbourhood council, so the rest of this report uses that title.

#### **4 Options considered and Recommended Proposal**

- 4.1 The report of the CGR is attached and sets out the considerations made, and conclusions reached. According to the agreed process, there were two options available: to accept the case in principle for the creation of a neighbourhood council and therefore to recommend to Cabinet that the process moves to the next stage or to reject the case and set out the reasons why the proposal is not considered advantageous.
- 4.2 As the report sets out, officers in the review team have concluded that the proposed neighbourhood council is likely to have a positive impact in terms of community cohesion and identities and that the size, population and proposed electoral arrangements will be conducive to effective and convenient governance. The recommendation is therefore the first option.

#### **5 Consultation**

- 5.1 The CGR report sets out in detail the consultation undertaken as part of the review and the feedback received. A variety of methods were used to consult residents and other stakeholders:
  - A questionnaire survey on Be Heard (the City Council's on-line survey tool)
  - Discussions with groups in the neighbourhood, using the Be Heard questions as prompts
  - Responses by email or post (key stakeholders were sent emails inviting their comments)
  - Phone calls to the Neighbourhood Development Support Unit
- 5.2 Awareness of the issue was raised using a variety of materials such as leaflets put through letter boxes and given to school students to take home, posters and pull-up banners, social media posts, ward forum meetings and press articles.
- 5.3 Responses to the consultation were nearly all from residents and groups in the area itself. A significant majority of people and groups who responded were in favour of the proposal. Respondents also suggested a range of activities that a new neighbourhood council could usefully carry out. There were also some concerns about the process for making the decision and about the cost of a new council and these will have to be taken



into account when providing further information to residents ahead of a consultative ballot.

- 5.4 The councillors for the two wards which contain the proposed council area have been consulted as key stakeholders. They have also received regular email updates and attended a series of briefing meetings with the officer team. The steering group also invited local councillors to all its meetings.

## **6 Risk Management**

- 6.1 The CGR process has included an assessment of risks involved in creating a new neighbourhood council, as required by statutory guidance. These are mainly concerned with a) community cohesion and the likely inclusivity of the council and b) practical issues around boundaries and elections as well as the viability of the proposed council and its likely ability to fulfil the objectives set and to improve governance in the area.
- 6.2 There are limited risks to the City Council in terms of the future operation of any neighbourhood council and the potential impact on service delivery and community cohesion in the area and the report sets out how these would be addressed as well as the potential opportunities of a new council in this regard. Risks in terms of the operation of the election system have been minimised through consideration of boundaries and the warding of the area during the review process.
- 6.3 Financial risks for any future neighbourhood council would be addressed through the regulatory regime in place for parish councils and do not fall on the principal council (i.e. the City Council).

## **7 Compliance Issues:**

### **7.1 How are the recommended decisions consistent with the City Council's priorities, plans and strategies?**

- 7.1.1 The recommendations and the process adopted are in line with the Working Together in Birmingham's Neighbourhoods white paper and the Policy Statement on parish councils adopted by Cabinet in May 2021 (see background documents below). The objectives of supporting stronger communities and neighbourhood level democracy are also reflected in the council's Corporate Plan.

### **7.2 Legal Implications**

- 7.2.1 The CGR process has been conducted in accordance with all relevant legislation and statutory guidance (see background documents below).

### **7.3 Financial Implications**

- 7.3.1 The only financial implications of this report are the cost of commissioning an external agency to conduct a consultative ballot and minor costs of further information provision to the community. These can be met within existing budgets. Parish councils can raise a Council Tax precept and are therefore not reliant on the City Council for their income, so there are no direct financial implications of the creation of a new neighbourhood council.

#### **7.4 Procurement Implications (if required)**

7.4.1 None.

#### **7.5 Human Resources Implications (if required)**

7.5.1 None.

#### **7.6 Public Sector Equality Duty**

7.6.1 Equalities and community cohesion are an important aspect of the CGR process and have been a priority in carrying out the review. The proposed new council must be likely to provide for community cohesion and respect identities in the area. A full equality impact assessment will be completed at the conclusion of the process (i.e. following the carrying out of the consultative ballot).

### **8 Background Documents**

- [Balsall Heath Community Governance Review Terms of Reference \(January 2022\)](#)
- [Community Governance Review: Balsall Heath \(Cabinet Report\) \(December 2021\)](#)
- [Statement of the Process for Creating New Parish Councils in Birmingham \(May 2021\)](#)
- [Working Together in Birmingham's Neighbourhoods \(White Paper\) \(January 2019\)](#)
- Report of the Community Governance Review on the proposed Balsall Heath Neighbourhood Council (attached at Appendix 1).





## Community Governance Review

### Proposal for a Neighbourhood Council in the Balsall Heath area of Birmingham

Local Government and Public Involvement in Health Act,  
2007

Draft Recommendations

Published 19 July 2022



# Contents

<b>Introduction .....</b>	<b>1</b>
<b>Summary of proposal .....</b>	<b>2</b>
<b>Consultation Process .....</b>	<b>5</b>
<b>Assessment of proposal.....</b>	<b>7</b>
A - Would it reflect the identities and interests of local communities? .....	7
B – Would it provide effective and convenient governance? .....	8
C – Response to the Consultation .....	10
<b>Conclusion.....</b>	<b>18</b>
<b>Recommendation .....</b>	<b>18</b>
<b>Appendix 1 - Balsall Heath CGR Communication Materials.....</b>	<b>19</b>
<b>Appendix 2 – Online survey questions .....</b>	<b>21</b>

## Introduction

1. This report presents the findings of a Community Governance Review undertaken by a team of officers of Birmingham City Council. The City Council's Cabinet will now be asked to assess the report and decide whether there is a case for conducting a consultative ballot of the local electorate, in line with City Council policy.
2. On 14 December 2021, following interest from various groups in the community, the City Council's Cabinet resolved to undertake a Community Governance Review (CGR) in relation to the proposal to create a parish council in Balsall Heath. The CGR was conducted under the provisions of the [Local Government and Public Involvement in Health Act 2007](#)) and, in accordance with the 2007 Act, the City Council also considered [Guidance on Community Governance Reviews \(2010\)](#).
3. The [Terms of Reference for the Balsall Heath CGR](#) were published on 1 February 2022, thus commencing the CGR. The Terms set out clearly the matters on which the CGR would focus.
4. To carry out this review, an internal Balsall Heath CGR Project Implementation Group was established – made up of officers from the Neighbourhood Development Support Unit, Governance, Planning and Strategic Policy. The Implementation Group met regularly and reported into the Parish Council Working Group – Chaired by the Assistant Director for Neighbourhoods (City Operations Directorate).
5. In line with the City Council's [Statement of the Process for Creating New Parish Councils in Birmingham \(2021\)](#), the key stages of the Balsall Heath CGR were as follows:
  - a) **Initial consultation (*first round of consultation*) (completed in May 2022)**  
Consult electors and stakeholders on the proposal to create a parish council in Balsall Heath.
  - b) **Evaluation (completed in June 2022)**  
Evaluate the proposal against the criteria set out in the Terms of Reference.
  - c) **Decision on consultative ballot (due on 26 July 2022)**  
Present an initial report and recommendations to the City Council's Cabinet. If there is sufficient evidence in favour of creating a parish council, Cabinet will consider whether a consultative ballot of electors in the area should be held as part of the consultation exercise.

- d) **Consultative ballot (*second round of consultation*)** (NB, this stage is dependent on the outcome of the report to Cabinet on 26 July 2022).  
If Cabinet resolves to hold a consultative ballot, the City Council will commission an external provider to organise it. The ballot will be a vote by the electorate in the area to determine whether a parish council should be established. There is no legal requirement to conduct a referendum on the establishment of a parish council; however, the City Council has committed to holding such a vote to ensure that there is adequate support for the proposal across the local community.

6. This report presents recommendations following stages A and B above.
7. In carrying out this review we have assessed whether the proposed neighbourhood council and its boundary:
- a) reflects the identities and interests of the community in that area, and
  - b) would provide effective and convenient governance of the area.
8. In interpreting these points, we have focused on:
- Community cohesion and equality – the impact on equalities, inclusive engagement and participation, community cohesion and community empowerment
  - Identities – the sense of place and community identity in the area
  - Effective governance – impact on local services and the practicality of electoral arrangements and other forms of governance already operating in the area or proposed
  - Size
  - Population
  - Boundaries
9. We have also given full consideration to the responses received during the initial phase of consultation (summarised in this report).

## **Summary of proposal**

10. The proposal for a neighbourhood council has been put forward by a group of active residents and organisations operating in the Balsall Heath area.
11. They have formed a Steering Group that has developed detailed proposals for a neighbourhood council and engaged with the City Council on practical issues such as boundaries and elections, should a neighbourhood council be created.

They are conducting a campaign, launched in November 2021 to secure the support of residents and this has included a number of events, engagement with schools, mosques and other local venues and the production of leaflets and posters. The Steering Group has also captured feedback from residents which has been forwarded to the City Council (see Consultation below).

12. The Steering Group has developed a range of options for the future role of a neighbourhood council, including making the neighbourhood:

- Accountable – Your Neighbourhood Council will be YOUR Council and be made up of local residents elected by YOU. Employing staff to coordinate, enable and strengthen your neighbourhood to work together to find solutions for local problems
- Cleaner – Working with households, businesses and the City Council towards becoming free of litter, rubbish and graffiti.
- Greener - Brightening up the streets, enjoying the open spaces and parks. Getting better at recycling, reducing pollution and caring for our environment.
- Safer - Making the area family-friendly, working with each other and local services to protect and keep everyone safe.
- Healthier- Asking for better health services and raising awareness of what is on offer to improve mental and physical health.
- Together - Building community activity, reducing loneliness and connecting people with others.
- Prosperous – Work to attract funding/investment to create jobs and regenerate the area, with a focus on delivering the Balsall Heath Neighbourhood Plan.

### **Boundaries and warding**

13. The proposed boundary is shown in the map overleaf. This is very similar to the boundary of the Neighbourhood Plan, produced in 2015. Some very minor adjustments have been made to align with City Council ward boundaries.

14. If warded, the parish will be split into two wards, with the Parish ward boundary following the existing City Council ward boundary between Balsall Heath West and Sparkbrook & Balsall Heath East, which follows the train line which runs from North to South through the area.

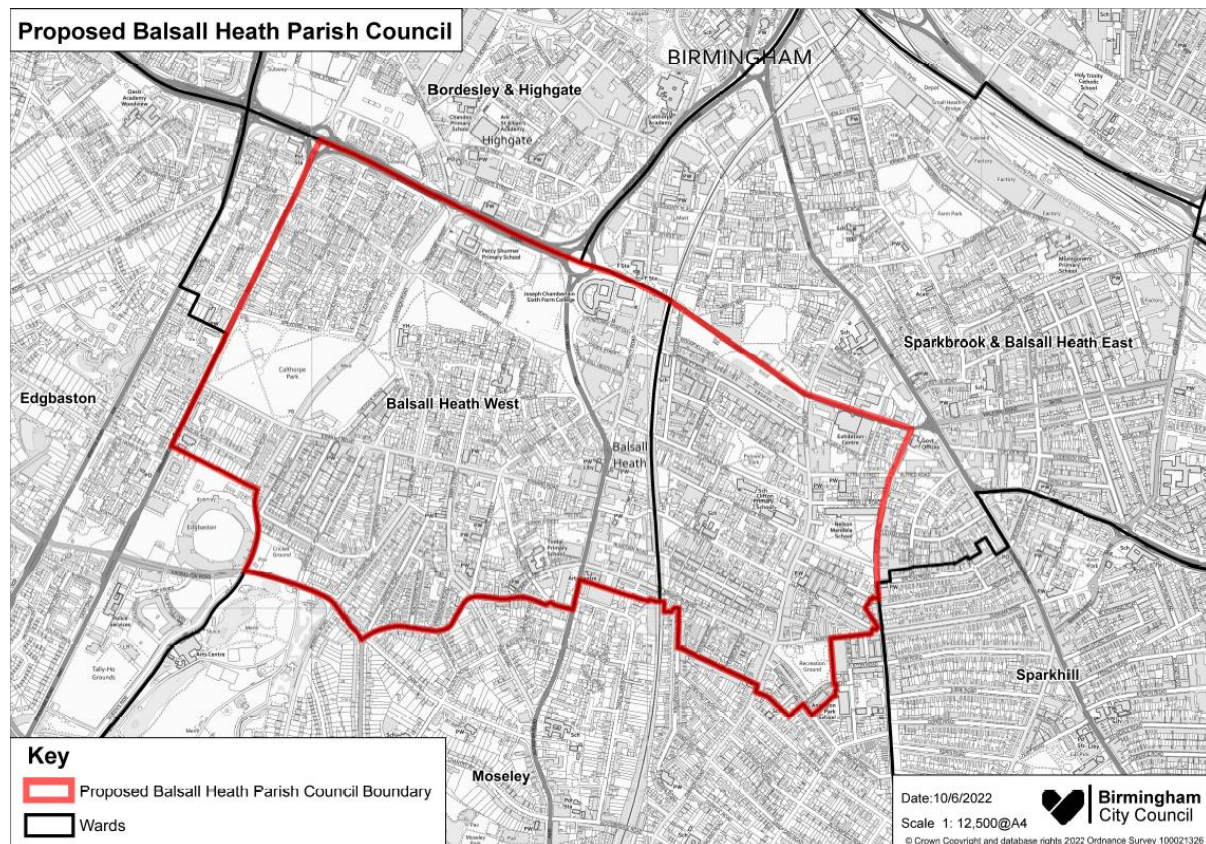
15. The parish boundary in Balsall Heath West follows existing polling district boundaries, but the polling district boundaries in Sparkbrook and Balsall Heath East will need to be redrawn to ensure the parish is contained within entire polling districts. This requires the Electoral Register to be republished, therefore the preferred date to carry out this administrative task is 1 December 2022 as part of



the annual republication.

16. The number of councillors for the parish is recommended to be between 13 and 18 (based on recommended allocations from the National Association of Local Councils and the Aston Business School, as well as the precedent of New Frankley in Birmingham parish councillor numbers). The final number will be dependent on the electorate, which is likely to be around 11,000, and the number of councillors will be split proportionately between the two wards.
17. Councillors may decide to sub divide the parish into smaller geographical areas which they will cover on an informal basis, however this will not be reflected in the official administrative boundaries used for the purposes of elections.
18. The first election of Parish Councillors would take place on the first Thursday in May 2023. Councillors elected at this election would serve a term of 3 years, after which point the elections would fall into line with the all-out city council elections and be held every 4 years, starting in May 2026.

**Map 1: Balsall Heath Neighbourhood Council: Proposed Boundary**



## Consultation Process

19. In accordance with the 2007 Act, the City Council was required to consult local government electors and other interested parties in the area under review. An initial period of consultation was undertaken between 14 February and 15 May 2022 (extended from 24 April) whereby local people and stakeholders were invited to respond to the proposal.
20. The aim of the communication and consultation process was to provide engaging, neutral, informative, accessible information to all those living and working in the proposed Neighbourhood Council area to enable them to find out more about the proposal and to maximise engagement, awareness and feedback.
21. In planning the consultation, the CGR Implementation Group received input from the City Council's Corporate Communications and Equalities and Cohesion Teams to develop effective communication materials in a range of formats. The strapline was 'find out more and tell us what you think...'. The City Council website was a key source of information at a range of levels, from a simple overview of the process to a more detailed FAQs, and links to other sources of information and consultation opportunities.
22. Appendix 1 contains examples of the information leaflet, poster, and pull-up banner which were developed and distributed in the Balsall Heath area.
23. It was vital that City Council information and communications were neutral and informative. As the proposers, the Balsall Heath Neighbourhood Steering Group are promoting the idea of a Neighbourhood Council and why they think it's a positive way forward for Balsall Heath. Officers worked closely with them to raise awareness of the issue and maximise engagement in the process but were careful to always maintain a neutral approach.
24. A range of channels were made available for stakeholders and residents to have their say:
  - An online survey using the City Council's consultation platform (Be Heard)
  - Group discussions using the Be Heard questions to prompt discussion and feedback – feedback could be sent as an audio or film recording of the discussion or a written summary of the feedback
  - Email or post (individual or group responses)
  - Telephone
25. The significant activities to encourage residents and other stakeholders to engage with the proposal included:
  - Production and distribution of 5,500 A5 information leaflets; 5 pull up banners, x250 A4 and x70 A3 posters - all featuring links for consultation, QR codes

that can be used to access info through mobile devices and contact information. Approximately 2,400 of these leaflets were given to the local Balsall Heath Primary Schools and they distributed them to all primary pupils to take home on the last day of term (pre-Easter school holidays). Leaflets have also been put through residents' doors and left at key venues and locations

- Distribution of posters and pull-up banners
- Regular social media posts agreed with and posted by a City Council Media Officer: Instagram, Facebook, Twitter and Linked In
- Utilising the opportunities in other press articles about Balsall Heath to raise awareness of the proposed Neighbourhood Council and CGR
- Writing (via email) to key stakeholders in the area at the start of the CGR Consultation, with CGR overview and FAQs - asking them to find out more, provide feedback and forward the email onto their relevant local contacts
- Regular online briefings and update emails with the relevant Councillors for Balsall Heath
- Keeping members of Parliament updated via email
- Presenting at the relevant Balsall Heath Ward meeting and discussing queries raised, and arranging for the Balsall Heath Steering Group to also present and answer any questions as the Neighbourhood Council 'proposers'.

26. Following internal discussion, it was decided to extend the formal consultation deadline to 15th May to allow additional time for residents and other stakeholders to give their views and feedback.

## **Assessment of proposal**

### **A - Would it reflect the identities and interests of local communities?**

#### **Community Cohesion, equality and identity**

27. The Balsall Heath area has a long tradition of community organisation and social enterprise, including a very active Neighbourhood Forum which provided many voluntary services in the area, and several residents associations. Activities included a range of street cleaning and waste clearance programmes, support to vulnerable and isolated residents and environmental improvements such as planting schemes.
28. In recent years these community groups have declined, and the Forum no longer operates, but there remains a lively set of community and religious associations and social enterprises, many operating around re-purposed buildings on Moseley Road.
29. Birmingham's first Neighbourhood Plan was produced in the area in 2015 and the process of creating the Plan displayed the strong community cohesion in the area whilst strengthening it further.
30. A key part of the tradition outlined above has been the interaction and collaboration between different communities within the area. It has not tended to be an area where the majority community dominates voluntary activity and social enterprise or excludes other groups.
31. The proponents of the neighbourhood council recognise that the area includes many smaller sub-neighbourhoods with a strong identity of their own and it is suggested that the neighbourhood council (if one were created) could consider appointing councillors to represent those smaller areas and ensure a balanced and inclusive approach across the whole of Balsall Heath. This would of course be a matter for the elected council and not for the City Council or the Steering Group to determine in advance. Under the warding scheme set out above it would be an informal process and not part of the election process.
32. The creation of a legally constituted neighbourhood council has the potential to ensure full representation of every part of the area, whilst bringing the whole area together and having a positive impact on community cohesion. The strengthening of community participation and "voice" is very much part of the case being made for a neighbourhood council and a sustainable, well-resourced governance structure has the potential to support further voluntary activity and participation in planning the future of the area, based on the area's history of engagement and



community empowerment.

33. The boundary for the proposed neighbourhood council is very similar to that of the former Neighbourhood Forum and of the Neighbourhood Plan. As such it represents a sustained and recognised “village” boundary which is meaningful and would offer a sense of place and local identity for residents. The area contains two substantial “high street” centres on Moseley Road and Ladypool Road providing a diversity of services, surrounded by residential streets and parks.

## **B – Would it provide effective and convenient governance?**

### **Effective governance**

34. The area has a tradition of community activism and participation and it is considered likely that elections to a neighbourhood council would be contested, providing for a good level of representation and accountability.
35. The area has a large number of enterprising and skilled residents who would be able to come forward as councillors or support the work of the neighbourhood council in other ways.
36. The area would provide for a Council Tax precept of around £200,000 per year if levied at an average rate of £50 for a Band D property (see table 1 below). This would provide for sustainable administration and some service delivery activity, enabling the neighbourhood to restore some of the activities of the former Neighbourhood Forum but with sustainable funding.
37. As the consultation has demonstrated (see below), residents have a lot of ideas for activities that a new neighbourhood council could carry out which would enhance the area. Added to the experience of many in the area of the previous Neighbourhood Forum, this would provide a good starting point for an effective council that could improve the governance of the area.

**Table 1: Potential Council Tax Yield at £50 for Band D**

<b>Band</b>	<b>Number of households</b>	<b>Yield relative to D</b>	<b>Yield total</b>	<b>Charge per household</b>	<b>Percent of households</b>
A	3,121	0.69	<b>£107,674.50</b>	£34.50	60.6%
B	1,271	0.78	<b>£49,569.00</b>	£39.00	24.7%
C	637	0.89	<b>£28,346.50</b>	£44.50	12.4%
D	93	1.00	<b>£4,650.00</b>	£50.00	1.8%
E	15	1.22	<b>£915.00</b>	£61.00	0.3%
F	8	1.44	<b>£576.00</b>	£72.00	0.2%
G	3	1.62	<b>£243.00</b>	£81.00	0.1%
H	1	2.00	<b>£100.00</b>	£100.00	0.0%
Total	<b>5,149</b>		<b>£192,074.00</b>		

## **Size**

38. The proposed area is somewhat smaller geographically than the average parish council but contains about four times their average population. However, it is fairly typical of the more densely populated urban parishes (for example it is similar in size and population to the Queens Park community council in London).
39. The size of the proposed area should provide for manageable and viable service planning and delivery, based on the previous experience of the former Neighbourhood Forum and for election candidates to mount campaigns across the whole of a parish ward.
40. The Neighbourhood Plan showed that the area contains five sub-areas, based on physical and economic characteristics and that it was a viable physical area in terms of the planning of development and physical improvements.
41. In summary, the area is large enough to provide for internal diversity and economies of scale in service delivery whilst being compact enough for a council to engage the whole of the electorate.

## **Population**

42. The population of the area was estimated at 16,230 in 2020 and there are around 10,600 electors. Based on past demographic trends Balsall Heath has a relatively stable population, the past five years has seen migration and natural changes cancel each other out (with a net increase due to natural change and a net loss due to movement). Balsall Heath has modest capacity for growth through residential development. If all properties in the five-year supply plan are built and occupied, current occupancy ratings for the area show the developments are

likely to add 150 people the population. Balsall Heath is not expected to show a significant increase or decrease in population within the next five years.

43. The area therefore has a viable and sustainable size of population and electorate on which to base a new parish council.

## **Boundaries**

44. As noted above, the boundaries proposed are the same as those for the Neighbourhood Plan and they represent an area which is identifiable to residents as “Balsall Heath”. In the north, west and east sides of the area they follow major roads. The southern edge follows a series of minor streets but now matches the boundary with Moseley ward. The proposed two wards within the parish are divided along the railway line which bissects the area.

45. The area crosses two City Council wards but manageable adjustments to polling districts can be made to ensure that it matches the boundaries of the polling districts within them. The external boundaries in the Balsall Heath West ward have been slightly adjusted to ensure that they match the new ward boundaries where possible.

46. With these adjustments the boundary proposed is meaningful to residents, follows sensible boundary markers and would be practical in terms of the administration of elections.

## **C – Response to the Consultation**

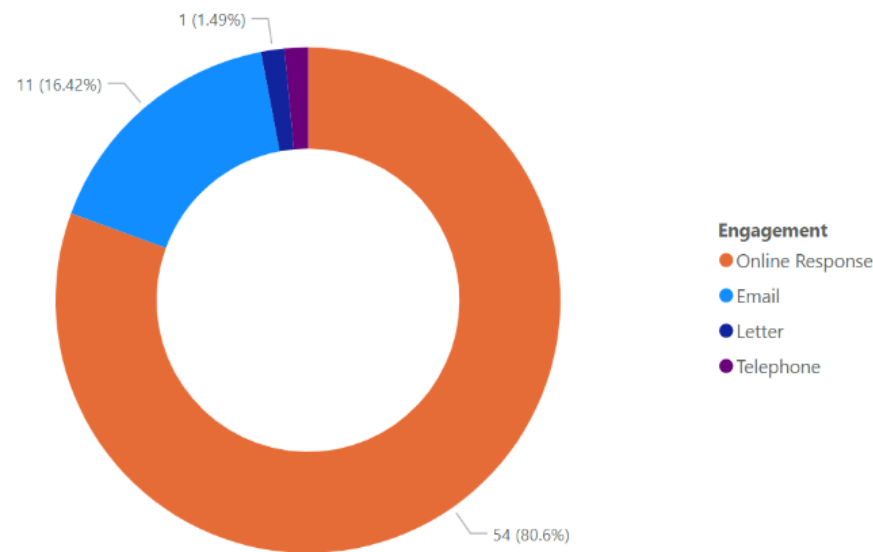
47. The consultation received 66 responses and almost all of these were from residents of the area or local community groups (see chart and map below). Thirteen of the responses were submitted on behalf of organisations or groups, following discussions on the issue, so the number who engaged is actually much higher.

- Balsall Heath Is Our Planet
- Moseley Road Baths
- Neighbourhood Strategic Partnership
- St Paul's Community Development Trust
- Ort Gallery
- Seven Streets Residents Association
- Apna Ghar
- Clean and Green
- Balsall Heath Local History Society
- Claim Assist UK limited
- EFBC Mens Group





Chart 1: Response to Consultation

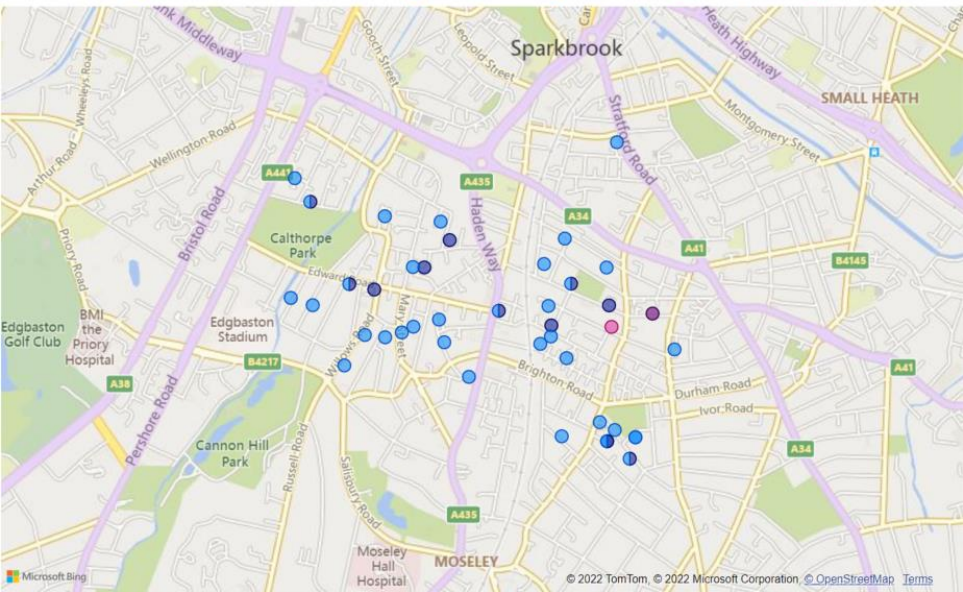


Q6 - Respondent (groups)	Count
Local resident	50
Community Organisation or Group	13
Former Resident	1
Worked in Area	1
Works in Area	1
Total	66

Map 2: Location of responses to the consultation

Respondent distribution

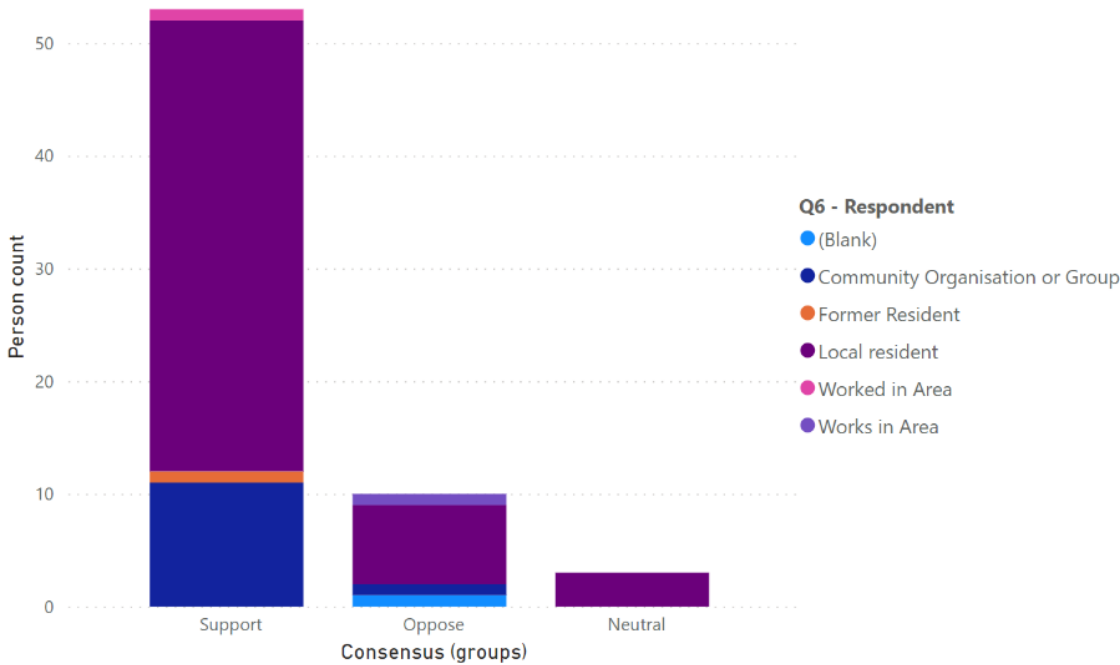
Response group ● Community Organisation or Group ● Former Resident ● Local resident ● Worked in Area ● Works in Area



48. A clear majority of respondents (79%) were in favour of the proposed neighbourhood council (see chart below).

**Chart 2: Views on the Creation of a Neighbourhood Council**

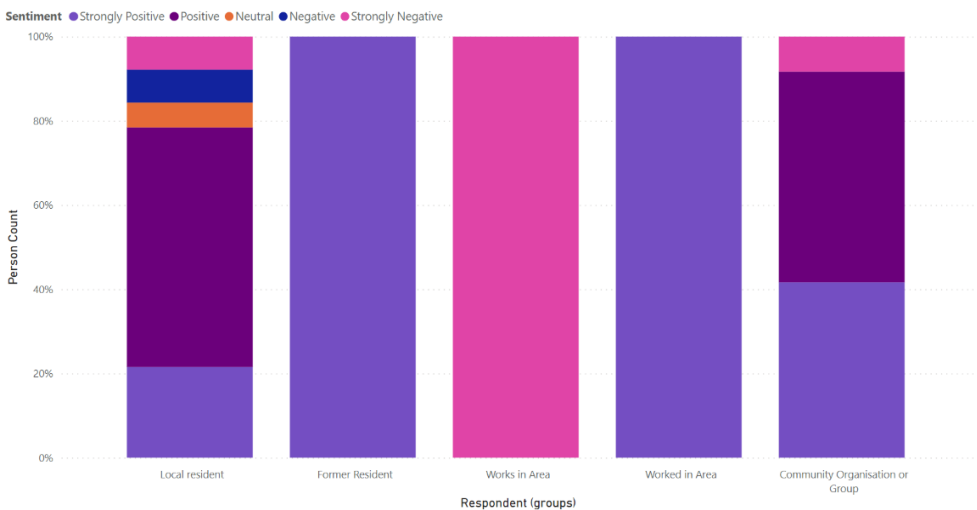
General view on formation of a Parish/Neighbourhood Council



49. Chart 3 shows the sentiment rating of responses by respondent group, indicating that amongst residents around 20% were strongly in favour of the proposal and amongst community organisations about 40% were strongly in favour. Just 8% of residents and one community organisation were strongly opposed to the proposal.

**Chart 3: Sentiment rating by respondent group**

Chart of sentiment by respondent group



50. Below are some typical comments in favour of the proposal:

"I believe the creation of a Neighbourhood Council for Balsall Heath is an exciting prospect offering improved outcomes and better wellbeing for the residents."

"My neighbourhood suffers from neglect, rubbish, anti-social behaviour and a sense that no one cares about it. It has gone backwards since the Balsall Heath Forum collapsed. I know that many people want to contribute and improve the place we share, but there is no body to coordinate positive action. Therefore, I welcome the proposal for a neighbourhood council as a long-term solution and I would happily vote for it, would participate in it and pay the small annual charge."

"Balsall Heath has always had an active third sector community and this was coordinated by the Balsall Heath Forum for twenty years. That organisation no longer exists and there is a gap, which the Neighbourhood Council could fill and more."

"This is a very interesting idea and could improve local democracy within the City and if this is successful other areas of the City may well learn from this and conduct a similar consultation and process."

"Seems sensible. BH has had a history of local decision making on a small scale and as a complex, highly multicultural and poor community it lacks the advocacy of more middle-class communities like Harborne or Kings Heath which means parts of it continue to be dilapidated e.g. parks, amenities etc."

"People who came expressed their concern about the loss of the Balsall Heath Forum, the lack of a voice for the area and the need for a stable source of income for such a body, also sought assurance that people on council tax benefit would not pay the precept. A majority were in support of having an elected Neighbourhood Council, at least in principle, but some wanted more information before making up their minds."

51. Views against the proposal included:

"I do not agree with creating yet another tier of bureaucracy and not in favour of parish council I already pay council tax and do not feel it is fair to pay more tax to support another layer of people who think they represent the residents."

"NO, there is no need, we already have an elected City Council another tier would just add costs to the residents and businesses, with no real benefit. There are other proven ways to improve areas, involve people in decision making."

52. Asked to consider alternatives to the proposal, some considered that approaches based on community organisations would be better:

“The community needs to be told how much more in taxes this is going to cost, Support would be better directed to existing Voluntary sector organisations to develop better capacity. [The] alternative is to develop smaller neighbourhood forums.”

“I would support these alternative forms of organisation especially resident associations. I really believe we in Balsall Heath will not get improved services via a parish council. I have worked and lived in the area for 42 years [and] don’t feel such [an] organisation would improve services that [the] council should provide.”

Balsall Heath benefits from having many active and prominent local organisations which successfully engage with local people – as evidenced by the suggestions made by consultees for alternative options to a parish council:

- Forums between Birmingham City Council and neighbourhood police
- Sparkbrook Neighbourhood Forum
- KIKIT
- Sparkbrook Business Association
- The Saheli group
- Second Saturday
- Moseley Road Baths
- ORT Gallery
- Gap project
- Local schools with community projects running
- Local residents’ associations (none specifically mentioned)
- Seven Streets Residents Association (and similar groups across east and west Balsall Heath)
- Other groups
- Existing voluntary sector organisations
- Local Mosques
- Groups/networks linked to Mosques and Churches in the area (including an interfaith group)

However, none of these groups would offer the sustainable funding and overarching democratic governance that a parish council could provide. As such, they are not alternatives to such a structure but rather they would continue to operate alongside (and could be supported by) a parish council.



53. A number of respondents also pointed out that the alternative of a neighbourhood forum had been tried and proved to be unsustainable. However, a parish council would have a sustainable income and would be fully recognised by the City Council.
54. Some respondents raised concerns about the proposal or the process for setting it up (see Table 2). Most of these were about the funding of the council. This emphasises the need for communications about the neighbourhood council to be as clear as possible, both in the run up to any consultative ballot and if a council is established.

**Table 2: Concerns about the proposal**

Attribute	Value
Concerns over funding / precept	14
Improve quality of map	5
How do we ensure fair and equitable representation of the community, no one group takes charge.	4
Uncertain of size of council and how will it be elected?	4
Unsure what the role of the council would be?	4
Deliver leaflet to households inviting comment on consultation.	2
Face to face contact, doorstep canvassing.	1
More transparency regarding the 'Steering Group'	1
Too much detailed information to digest in such a short amount of time.	1
<b>Total</b>	<b>36</b>

55. Respondents suggested a wide range of services and activities that a neighbourhood council could provide (see Table 3 overleaf), demonstrating people's willingness to properly engage with the proposal and consider how a parish council could work for them in practice

**Table 3: Suggestions for services that a Neighbourhood Council could provide**

Suggested Services	Count
Street cleaning/bulk refuse collection	28
Management of parks and open public spaces including playgrounds.	24
Environment improvements, including communal gardens and graffiti removal	17
Public parking and parking enforcement	17
Tackling poor/antisocial behaviour, including drug use & prostitution	17
Coordination of volunteers, voluntary groups and community projects.	14
Provide/maintain public (community) buildings including bathrooms	13
Improvements to public transport links and those choosing to walk/cycle	10
Public/community/cultural events including local festival and farmers markets etc	10
Reintroduce community wardens	10
Fly tipping	9
Strong environmental principles, including recycling, improving air quality and stopping use of toxic weedkiller	9
Youth/children's services.	9
Advice and advocacy	7
Crime prevention	6
School's and education services (including Adult Education).	6
Local healthcare, wellbeing and mental health services	5
Street lighting	5
Traffic calming measures	5
Elderly & Adult services	4
Planning decisions including HMO licences.	4
Social housing/landlord	4
Allotments	3
CCTV	2
Fostering economic growth	2
Feeling unheard.lacking a voice or representation.	1
Homelessness	1
Road improvements	1
<b>Total</b>	<b>243</b>

## **Conclusion**

56. Based on the evidence above, the officer team have concluded that the proposal to create a new Neighbourhood Council in the Balsall Heath area reflects the identities and communities of the area and is likely to provide for effective and convenient governance.

57. This report will now be published, and further responses invited. Moving to a second stage of consultation, culminating in a consultative ballot of all electors in the area, will enable community dialogue to continue and further information to be provided to residents, clarifying some of the implications of the proposal and further developing the options for how a neighbourhood council would operate.

## **Recommendation**

58. In accordance with Birmingham City Council's agreed procedure for the creation of new parish councils, Cabinet will therefore be recommended to agree that a consultative ballot be organised to include all the registered electors in the area of the proposed neighbourhood council.

59. If the consultative ballot indicates majority support for the proposal and achieves the turnout threshold then the full City Council will be recommended to approve the necessary Order to create the council, with the first elections in May 2023.

## Appendix 1 - Balsall Heath CGR Communication Materials

### Balsall Heath CGR A4 poster and pull-up banner



 Birmingham City Council

# NEIGHBOURHOOD COUNCIL IN BALSALL HEATH?

**FIND OUT MORE  
TELL US WHAT YOU THINK...**



**ONLINE SURVEY:**  
[www.birminghambeheard.org.uk/economy/balsall-heath-cgr/](http://www.birminghambeheard.org.uk/economy/balsall-heath-cgr/)

 **SURVEY CLOSING :  
24TH APRIL 22**

Email us: [NDSU@birmingham.gov.uk](mailto:NDSU@birmingham.gov.uk)

Post: Balsall Heath Community Governance Review, NDSU, Stinchley Baths Community Hub, 2-4 Bournville Lane, Stinchley, B30 2JT.

Phone: 07594 509 938

**BE BOLD  
BE BIRMINGHAM**



 Birmingham City Council

# NEIGHBOURHOOD COUNCIL IN BALSALL HEATH?

**FIND OUT MORE  
TELL US WHAT YOU THINK...**

**ONLINE SURVEY:**  
[www.birminghambeheard.org.uk/economy/balsall-heath-cgr/](http://www.birminghambeheard.org.uk/economy/balsall-heath-cgr/)

 **SURVEY CLOSING :  
24TH APRIL 22**

Email us: [NDSU@birmingham.gov.uk](mailto:NDSU@birmingham.gov.uk)

Post: Balsall Heath Community Governance Review, NDSU, Stinchley Baths Community Hub, 2-4 Bournville Lane, Stinchley, B30 2JT.


Phone: 07594 509 938

**BE BOLD  
BE BIRMINGHAM**






## Balsall Heath CGR A5 leaflet




# TELL US WHAT YOU THINK ABOUT CREATING A NEIGHBOURHOOD COUNCIL IN BALSALL HEATH



### WHAT IS ALL THIS ABOUT?

Groups from your local area want to create a parish (or neighbourhood) council in Balsall Heath. They have put forward a proposal to Birmingham City Council and will be campaigning on the issue locally.

BE BOLD  
BE BIRMINGHAM



### WHAT IS A NEIGHBOURHOOD COUNCIL?

Neighbourhood Councils are elected and made up of local people, working at the most local level and closest to the community. They don't replace the City Council, which is responsible for the whole city. Neighbourhood Councils can:

- Have legal powers and authority.
- Own land and buildings and other assets.
- Provide local services.

### WHAT ARE THE BENEFITS OF A NEIGHBOURHOOD COUNCIL?

Some of the things a Neighbourhood Council could do are:

- Provide a wide range of local services to add to or improve those provided by the City Council
- Improve local areas
- Improve local decision making
- Provide a greater local voice for the community
- Raise additional public money within their area to support local needs

### HOW CAN I GIVE MY VIEWS ON THIS PROPOSAL?

There are two ways in which local people can inform and influence the process:

- 1. Take part in the consultation.**  
This decision could have a big impact on the future of the area and the City Council feels it is very important to hear what people living and working in Balsall Heath think about how the area should be run. You can:

- Complete a brief online survey via **Balsall Heath Community Governance Review Online Survey** (please see below for links / how to access survey)
- Send an email to Neighbourhood Development Support Unit (NDSU@Birmingham.gov.uk). Please ensure your email is titled "Balsall Heath Community Governance Review" so it can be directed to the right team.
- Send a letter to Balsall Heath Community Governance Review, NDSU, Stirchley Baths Community Hub, 2-4 Bourville Lane, Stirchley, B30 2JT

**2. Vote in the consultative ballot later in the year** (if one is held). If the proposal is accepted by the City Council and you are registered to vote, you can cast your vote in a referendum.

### WHERE CAN I GET FURTHER INFORMATION?

For more details about the proposed Neighbourhood Council in Balsall Heath you can:

- Visit the council webpage by using this link: [https://www.birminghambeheard.org.uk/economy/balsall-heath-cgr/consult\\_view/](https://www.birminghambeheard.org.uk/economy/balsall-heath-cgr/consult_view/) or Search "Balsall Heath Community Governance Review" on an Internet search engine or the Council's homepage
- Contact us by phone on **07594 509 938** (this line is open Monday to Friday between 10am and 4pm)

### SOME KEY QUESTIONS

#### HOW WILL THE NEIGHBOURHOOD COUNCIL BE FUNDED?

Neighbourhood Councils can raise a small amount of money from residents in the area (called a "precept"). This can be used to provide extra, different, or improved local services. This would be collected along with your Council Tax (the same exemptions and discounts would apply). If you do not pay Council Tax, you will not pay the precept.

It is not possible to say exactly how much the precept would be until a Neighbourhood Council is elected – it will be for the Neighbourhood Council councillors to decide. But it's estimated that a potential precept in Balsall Heath would be around £1 a week.

#### HOW IS THE DECISION MADE?

Birmingham City Council is required to carry out a "Community Governance Review" to assess whether a Neighbourhood Council would:

- Represent your community and its needs better at a local council level.
- Get enough support from organisations, community groups and local people to create and effectively run the council.
- Make sure local people and your community have a stronger voice and can better influence decisions that affect you.

This review will include finding out what local people, like you, think about the idea – see above for how you can share your views.

Once the review has been completed, the City Council will decide whether to take the proposal further. If they do, every voter in the area will be able to have a final say (in a "consultative ballot") on whether a neighbourhood council in Balsall Heath is created.

This information is from Birmingham City Council.

## Appendix 2 – Online survey questions

### Overview

Birmingham City Council would like to hear your views on community governance in Balsall Heath – specifically whether a parish / neighbourhood council should be created in the area.

The proposal to create a parish / neighbourhood council in Balsall Heath has been put to the City Council by local community groups. The City Council's Cabinet has decided to conduct what is called a "Community Governance Review" (CGR) in response to the proposal, in line with the policy agreed in May 2021.

The City Council is required by law to consult residents and stakeholders as part of the CGR. We are encouraging people to have their say on the proposal by responding to this survey as part of the consultation.

We will consider all responses received in connection with the CGR, alongside other evidence, to evaluate the proposal and make recommendations as to whether a parish / neighbourhood council should be created.

If there is sufficient evidence in favour of creating a parish / neighbourhood council, the City Council's Cabinet will consider whether a consultative ballot should be held. This ballot is a second round of consultation, and it gives every voter in the area an opportunity to have a final say on the proposal. The Council will do this to ensure there is adequate support for the proposal across the local area.

While we are particularly keen to hear from residents, businesses, and organisations based in the area, this survey is open to anyone who may be interested.

**Further information is provided in the documents and via the links at the bottom of this page. We recommend reading this information before responding to this survey.**

Written responses to the CGR can also be submitted via email and post:

- Email: [NDSU@birmingham.gov.uk](mailto:NDSU@birmingham.gov.uk) – *please ensure emails are titled "Balsall Heath Community Governance Review" so it can be directed to the right team*
- Post: Balsall Heath Community Governance Review, NDSU, Stirchley Baths Community Hub, 2-4 Bournville Lane, Stirchley, B30 2JT

### Why your views matter

All citizens have a right to be consulted on how they are governed and what arrangements are put in place to run their local area. We want to hear your views on this proposal because community governance needs to work for local people. We will consider all responses received when we evaluate the proposal and arrive at recommendations on whether a parish / neighbourhood council should be created.

### Parish / neighbourhood councils

The City Council needs to ensure that community governance within the area under review will be reflective of the identities and interests of the community in that area, and be effective and convenient.

Ultimately, the recommendations made in a Community Governance Review (CGR) ought to bring about improved community engagement and better local democracy, and result in more effective and convenient delivery of local services.

Parish / neighbourhood councils are the lowest level of local government in England. They offer the potential to:

- Improve smaller areas of the city
- Improve local decision making
- Provide a local voice for the community

They have legal powers to deliver certain public services, and can raise a small sum of money from local residents in the area (called a “precept”) which is collected along with Council Tax. This charge would be used to provide additional services and support local needs. The charge would not be paid by all households – it would only be paid by those who pay Council Tax (the same exemptions and discounts would apply).

**Q1. With this in mind, please share your views on the proposal to create a parish / neighbourhood council in Balsall Heath.**

[Free textbox for answers]

**Proposed area**

A parish / neighbourhood council should reflect a distinctive and recognisable community of place, with its own sense of identity.

This map shows the proposed area for the parish / neighbourhood council in Balsall Heath:  
[Balsall Heath Community Governance Review - map of the proposed area](#)

**Q2. With this in mind, please share your views on the proposed area. For those who have a local connection to the area, you might want to consider how well the proposed boundary reflects perceived community or neighbourhood boundaries, and whether it makes sense as a potential parish / neighbourhood council area.**

[Free textbox for answers]

**Alternative forms of community governance**

A parish / neighbourhood council is one way that Balsall Heath could work together to find solutions for local problems, but there are alternative forms of community governance / representation.

Other bodies that can represent local residents include community groups and Resident Associations. These are more informal bodies and do not have the legal status of a parish / neighbourhood council – meaning they cannot deliver public services or raise taxes, but they can enable residents to come together to address specific issues in the area. Many such groups already exist or have existed in the past in Balsall Heath.

As part of the CGR, the Council will explore whether alternative forms of community governance would be more suitable for Balsall Heath.

**Q3. With this in mind, please share your views on whether you think there are other well-established forums in the area that would be more suitable in promoting community representation and engagement, as alternatives to creating a parish / neighbourhood council.**

[Free textbox for answers]

### **Your views on local services**

Parish / neighbourhood councils can own land and assets and can provide or run services at a local level, for example grass cutting, street lighting, open spaces, community buildings, and allotments.

For further information about what parish / neighbourhood councils can do, please see the [National Association of Local Councils report, "All about Local Councils"](#).

**Q4. With this in mind, if you are in favour of the proposal, please share your views on what types of services you would like a parish / neighbourhood council in Balsall Heath to deliver, should one be created.**

[Free textbox for answers]

### **Any other comments**

Q5. Please tell us your views on any other matters concerning the proposal to create a parish / neighbourhood council in Balsall Heath.

### **About you**

**Q6. Please tell us whether you are a:**

Local resident

Former resident

Future resident

Official representative of a community organisation or group in the area – please state which one using the textbox below

Official representative of a business in the area – please state which one using the textbox below

Other – please state using the textbox below

**Q7. Please enter the postcode of your home (if a local resident) or work / other premises with which you have a local connection:**

**Q8. If you would like us to update you as the CGR progresses, please provide your name and email address or postal address.**





# Birmingham City Council

## Report to Cabinet

26<sup>th</sup> July 2022



**Subject:** REFUGEE RESETTLEMENT SCHEMES YEAR 2-5  
CONTRACTS

**Report of:** Professor Graeme Betts, CBE  
Director for Adult Social Care

**Relevant Cabinet Member:** Cllr John Cotton - Social Justice, Community, Safety, and Equalities  
Cllr Yvonne Mosquito - Finance and Resources

**Relevant O & S Chair(s):** Cllr Sir Albert Bore - Co-ordinating  
Cllr Akhlaq Ahmed - Resources

**Report author:** Saba Rai  
Head of Service Adult Social Care  
Email: [Saba.Rai@birmingham.gov.uk](mailto:Saba.Rai@birmingham.gov.uk)

Are specific wards affected?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No – All wards affected
If yes, name(s) of ward(s):		
Is this a key decision?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No
If relevant, add Forward Plan Reference: 010322/2022		
Is the decision eligible for call-in?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No
Does the report contain confidential or exempt information?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
If relevant, provide exempt information paragraph number or reason if confidential:		

### 1 Executive Summary

- 1.1 As a City of Sanctuary, Birmingham City Council commissions a range of resettlement contracts to support the integration and resettlement needs of refugees arriving into the country.

- 1.2 These contracts were commissioned under the Syrian Vulnerable Persons Resettlement Scheme funded by the Home Office for initially 2 years plus 1 year, during 2019.
- 1.3 Planned re-procurement of these contracts approved via the Planned Procurement Activity Report at Cabinet in January 2022 has been delayed due to the immediate need for the refugee resettlement teams to divert capacity into the urgent and time critical response to the Afghan Crisis (Cabinet report 14<sup>th</sup> December 2021) and more recently the Ukraine Crisis (Cabinet report 26<sup>th</sup> April 2022).
- 1.4 As a result, the timelines for completing the re-procurement of the contracts have slipped considerably against the plans set out in January 2022, therefore we are proposing to extend the current contracts to 31<sup>st</sup> March 2023 to enable continued service delivery to vulnerable groups and allow time to develop and procure a framework agreement to enable efficient and compliant contracted service delivery for the future.
- 1.5 It is proposed that a Refugee Resettlement Support and Integration Framework Agreement is procured to enable commissioners to respond efficiently to current and potential future requirements.

## **2 Recommendations**

- 2.1 Cabinet approves extensions to the existing YR2-5 Refugee Resettlement contracts set out in section 7.3.2 until 31<sup>st</sup> March 2023. The total value of the contract extensions is £304,092.65
- 2.2 Cabinet delegates authority to the Cabinet Member for Social Justice, Community, Safety, and Equalities and the Cabinet Member for Finance and Resources to approve the procurement strategy for a Refugee Resettlement Support and Integration Framework for Birmingham. The framework agreement will be for a value of up to circa £35m and duration of four years effective from 1<sup>st</sup> February 2023. To authorise officers to establish a framework of experienced refugee resettlement and integration support providers by 1<sup>st</sup> April 2023 in order to deliver more effective and streamline re-procurement of all refugee resettlement contracts from this date.
- 2.3 Cabinet delegates authority to the Director of Adult Social Care in conjunction with the Director of Council Management, City Solicitor and Monitoring Officer and the Assistant Director of Development and Commercial (or their delegates) following the procurement process to conclude the framework for a period of four years with an anticipated start date of 1<sup>st</sup> February 2023.
- 2.4 Cabinet delegates authority to the Director of Adult Social Care in conjunction with the Head of Service (Finance), Appointed Solicitor (Commercial) and the Head of Category (Procurement) to award Call Off contracts under the framework agreement for contract values above the procurement threshold.
- 2.5 Authorise the City Solicitor and Monitoring Officer (or their delegate) to negotiate and agree all legal documents to give effect to the above recommendations.

### 3 Background

- 3.1 Since 2015, Birmingham's approach to refugee resettlement has been to procure services that address resettlement and integration needs and foster settlement and independence.
- 3.2 Following extensive consultation with stakeholders, experts and refugees themselves, BCC introduced in 2019 a range of support services to help refugees arriving through the Syrian Vulnerable Persons Resettlement Scheme (SVPRS) to meet their integration needs in years 2-5 of the scheme, once their accommodation and orientation needs had been addressed in year 1.
- 3.3 These services have provided crucial resettlement and integration support to Syrian refugees to assist in their resettlement in Birmingham.
- 3.4 Currently, these services and contracts are structured as follows:

Contract		Contract value (per year)	Contract end
Year 2+	Welfare & Tenancy Support	£144,395	11 <sup>th</sup> May 2022
	Birmingham Navigators	£139,000	30 <sup>th</sup> June 2022
	Employment Support	£143,244	30 <sup>th</sup> June 2022
	Mental Health Awareness	£142,000	31 <sup>st</sup> January 2023

- 3.5 The contracts deliver support to refugees to resettle and integrate in the local community, gain independence and resilience. The delivery of these contracts minimises the strain on public services and resources ensuring refugees are connected into their communities, employable and able to effectively manage and maintain tenancies.
- 3.5.1 Birmingham Navigators service is contracted to link refugees to local support to prevent social isolation, according to their interests and hobbies, as well as to encourage links with local support and communities.
- 3.5.2 Employment Support service is contracted to assist refugees in becoming work ready, obtaining employment, creating career pathways, providing training opportunities and supporting with recruitment and selection processes.
- 3.5.3 Welfare & Tenancy Support service is contracted to help refugees with maintaining their tenancies, including personal budgeting and providing support with family welfare issues.
- 3.5.4 Mental Health Awareness service is contracted to raise awareness regarding mental health issues amongst refugees and help them access relevant services.
- 3.6 Three of the contracts for the year 2+ service provision have ended and are currently being provided out of contract. The 4<sup>th</sup> contract will end in January 2023 however the intention is to extend this contract too.

- 3.7 Planned Procurement Activity to re-procure these contracts was agreed in January 2022 (background documents) however commissioning resources were diverted to the Ukrainian crisis and the procurement is currently on hold.
- 3.8 To minimise this situation arising in the future, the commissioning capacity within the refugee and migration team has been expanded to enable greater flexibility. In addition, the establishment of a Refugee Resettlement Support and Integration Framework Agreement will deliver a more effective and streamline re-procurement process for refugee resettlement contracts.
- 3.9 Since 2019, the Home Office has introduced further re-settlement schemes in response to global crisis and Birmingham City Council has pledged its support to refugees as follows:
- SVPRS
    - Pledge 550 between 2015 – 2020
    - Resettlement support until 2025
  - UK Resettlement Scheme (UKRS):
    - Pledge 110 between 2021/2022.
    - Resettlement support until 2027.
  - Afghan Relocation and Assistance Policy (ARAP) for Afghan Interpreters:
    - Pledge 80 in 2020/2021.
    - Resettlement support until 2024.
  - Afghan Citizens Resettlement Scheme (ACRS)/ARAP combined:
    - 110 per year over 2022/2023 and 2023/2024.
    - Resettlement until 2027.
  - Ukraine Resettlement Scheme
    - Uncapped 2022-23
    - Resettlement support until 2024
- 3.10 The current contracts provide re-settlement support to refugees arriving under the SVPRS, UKRS and Afghan re-settlement schemes. Whilst the intake of refugees under the SVPRS scheme has ended, BCC has committed to providing up to 5 years of resettlement support and received funding from Home Office to deliver its pledge.
- 3.11 Due to unforeseen circumstances that necessitated an emergency response to the crisis in Afghanistan and more recently the devastating war in Ukraine, the timelines for completing the re-procurement of the contracts have slipped considerably against the plans set out in January 2022.
- 3.12 Due to the unforeseen nature of these crises together with future requirements during the term of the framework agreement, discussions with procurement colleagues have resulted in the proposal for a more proactive approach. This

approach includes a framework agreement to provide these YR2+ resettlement services and the YR1 services which were contracted via a Single Contractor Negotiation.

- 3.13 By establishing a Resettlement and Integration Framework Agreement for Birmingham the Council will be able to respond more efficiently to all existing and future resettlement requirements.
- 3.14 A framework agreement does not commit the Council to any expenditure, the expenditure is set at the Call Off contract stage which will be subject to appropriate governance and funding.
- 3.15 The framework agreement will be for the maximum duration of four years; note Call Off contracts can be for shorter or longer periods and can exceed the framework agreement end date.

#### **4 Options considered and Recommended Proposal**

- 4.1 Option 1 – Deliver in house. The knowledge and experience needed to deliver this service in house does not exist. Additionally, the flexibility required to respond to the fluctuations in service demand with appropriate and timely responses for individuals means that an in-house service is not best value.
- 4.2 Option 2 - Reprocure the services via a contract as approved by Cabinet in the Planned Procurement Activity Report. This is not an option as the contracts will expire before the procurement is concluded and the commissioning resources cannot currently be allocated to a procurement. This option would also reduce the value of the proposed framework agreement and make that less attractive for potential bidders.
- 4.3 Option 3 - Single Contractor Negotiation (SCN)– although the Afghan and Ukrainian crises were unforeseen and required resources to be diverted; there are insufficient grounds for an SCN for these services as contracts existed and were due to expire.
- 4.4 Option 4 – Continue with out of contract service delivery. This is not an option due to the compliance requirements.
- 4.5 Option 5 - Extend the current contracts to 31<sup>st</sup> March 2023 to enable continued service delivery to vulnerable groups and allow time to develop and procure a framework agreement to enable efficient and compliant contracted service delivery for the future. This is the preferred option.

#### **5 Consultation**

- 5.1 Discussions have taken place with current providers, and they are happy to continue delivering these contracts as proposed.

#### **6 Risk Management**

- 6.1 Risks will be identified, evaluated and controlled in line with the Birmingham City Council Risk Management Methodology 2017.



## **7 Compliance Issues:**

### **7.1 How are the recommended decisions consistent with the City Council's priorities, plans and strategies?**

- 7.1.1 The decision is consistent with the council's City of Sanctuary Policy Statement 2018-22, which was approved by Cabinet in late 2018 and by Full Council in January 2019.

### **7.2 Legal Implications**

- 7.2.1 The Council has power to procure these services under its power of competence under s.1 Localism Act 2011.

### **7.3 Financial Implications**

- 7.3.1 The Council has received Home Office funding since 2015 to resettle Syrian refugees. There is a duty of care for these citizens until 2026. Additional Home Office funding is being provided for these services.

- 7.3.2 See table for information on the contract extensions:

<b>Provider &amp; Service</b>	<b>Annual value</b>	<b>Contract Duration Value</b>	<b>Extension value</b>	<b>Extension duration</b>
ACH Ltd -Employability Service	£143,244.00	£429,732	£95,496	8 months
Birmingham and Solihull MHFT -MH Awareness	£142,000.00	£426,000	£23,666.66	2 months
Refugee Action - Birmingham Navigators	£139,000.00	£417,000	£92,666.66	8 months
Spring Housing Association - Welfare & Tenancy	£144,395.00	£433,185	£92,263.33	8 months
<b>TOTAL</b>	<b>£568,639.00</b>	<b>£1,705,917</b>	<b>£304,092.65</b>	

- 7.3.3 A framework agreement does not commit the Council to any expenditure. Any contracted services will be within the funding allocations of the resettlement schemes and the Council's governance arrangements with delegations as set out in this report.

- 7.3.4 The estimated value of the framework has been calculated as set out in the table below:

<b>Potential Service Requirements to be allocated to the Framework Agreement</b>	<b>Cost per person per annum</b>	<b>Number of people</b>	<b>Annual value for the number of people (estimated)</b>	<b>Duration (years)</b>	<b>Total Value (estimated)</b>
Resettlement Support Services (SVPRS, UKRS & Afghan) 2yr+	£1,500	810	£1,215,000	4	£4,860,000

Ukrainian Resettlement (Unknown if required) YR1	£7,500	1,000	£7,500,000	2	£15,000,000
Ukrainian Resettlement (Unknown if required) 2yr+	£1,500	1,000	£1,500,000	2	£3,000,000
Future Resettlement Support Services (Unknown if required) YR 1	£7,500	220	£1,650,000	2	£3,300,000
Future Resettlement Support Services (Unknown if required)) YR2+	£1,500	220	£330,000	4	£1,320,000
Unknown future requirements (25% of total value of contracts)					£6,870,000
<b>Potential total value</b>					<b>£34,350,000</b>

#### 7.4 Procurement Implications (if required)

- 7.4.1 The proposals within this report will ensure compliance with the Council's Governance arrangements (in particular, in relation to the three expired contracts Part D, Paragraph 3.7 and in relation to the ongoing contact, Part D Paragraph 3.4 of the Constitution). They also provide an efficient procurement solution that is compliant with the Public Contract Regulations (PCR) 2015.
- 7.4.2 Regulation 72. (1) of the Public Contract Regulations provides that "Contracts and framework agreements may be modified without a new procurement procedure...in any of the following cases...(b) for additional works, services or supplies by the original contractor that have become necessary and were not included in the initial procurement, where a change of contractor (ii) would cause significant inconvenience or substantial duplication of costs for the contracting authority; provided that any increase in price does not exceed 50% of the value of the original contract. The current proposal for the framework is within this threshold.
- 7.4.3 Given that this arrangement is time-limited and that the recommendations of this report will commence a procurement process, the risk of challenge from other potential providers is considered to be minimal and outweighed by the risk of not having a continuation of service in place.

- 7.4.4 If approved, contract variations will be agreed for the minimum extension period required to permit an open procurement exercise to be undertaken for replacement services.

## **7.5 Human Resources Implications (if required)**

- 7.5.1 The procurement of the framework agreement and subsequent Call Off contracts will be undertaken within existing resources by procurement officers in Council Business Management and commissioners in Adult Social Care.
- 7.5.2 The contracts will be managed within existing commissioning resources in Adult Social Care.

## **7.6 Public Sector Equality Duty**

- 7.6.1 The framework agreement will ensure the local authority can discharge its responsibilities under the Equality Act through the provision of resettlement support and co-ordination to arriving refugees under a range of resettlement schemes.
- 7.6.2 Those arriving are predominantly women and children. Safeguarding mitigations will be incorporated in the procurement of the framework agreement and subsequent Call Off orders.
- 7.6.3 An Equality impact Needs assessment has not been completed for this report due to the urgent need to extend contracts. The assessment will be done for the proposed delegated procurement strategy.

## **8 Appendices**

- 8.1 None

## **9 Background Documents**

- 9.1 Delegated Procurement Strategy Report 15<sup>th</sup> January 2019 – Vulnerable Person's Resettlement Scheme – Support and Integration Services
- 9.2 Report to Cabinet 18<sup>th</sup> January 2022 – Planned Procurement Activities (February 2022 – April 2022)

# Birmingham City Council

## Report to Cabinet

26<sup>th</sup> July 2022



**Subject:** Contract Extension - Civil Parking Enforcement Services (P129)

**Report of:** Rob James, Strategic Director of City Operations

**Relevant Cabinet Member:** Councillor Liz Clements – Transport  
Councillor Yvonne Mosquito – Finance and Resources

**Relevant O & S Chair(s):** Councillor Chaman Lal, Chair of Sustainability and Transport Overview and Scrutiny Committee  
Councillor Akhlaq Ahmed, Chair of Resources Overview and Scrutiny Committee

**Report author:** Stacey Ryans, Parking Services Manager,  
Email Address: [stacey.ryans@birmingham.gov.uk](mailto:stacey.ryans@birmingham.gov.uk)

Are specific wards affected?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No – All wards affected
If yes, name(s) of ward(s):		
Is this a key decision?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No
If relevant, add Forward Plan Reference: 008616/2021		
Is the decision eligible for call-in?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No
Does the report contain confidential or exempt information?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No
Exempt Appendix 2: Item 3 Information relating to the financial or business affairs of any particular person (including the council)		

## 1 Executive Summary

- 1.1 To seek approval to further extend the current contract with NSL Services Ltd for Civil Parking Enforcement Services (including Vehicle Removals) and for Traffic Regulation Order (TRO) Support for the period 1<sup>st</sup> February 2023 to 31<sup>st</sup> January 2024 as an amendment to contract within the scope of regulation 72 of the Public Contracts Regulations 2015.
- 1.2 To seek approval to delegate the approval of the tender strategy & subsequent contract award for the replacement contract to Cabinet Member for Finance and Resource and Transport.
- 1.3 The Government has committed to make the moving traffic enforcement powers under Part 6 of the Traffic Management Act 2004 available to local authorities outside London. The regulations giving effect to these powers were laid in Parliament earlier this year. Whilst awaiting Parliamentary approval, Local authorities currently undertaking civil enforcement of parking, have been permitted to apply in advance of the regulations coming into force to adopt moving traffic enforcement powers. This would be once they have completed public consultations and all other necessary preparations, which includes review of signage and to digitise all Traffic Regulation Orders.
- 1.4 If the Council wishes to adopt these moving traffic enforcement powers, the proposed extension will provide more time to undertake the preparatory work which will give a fuller understanding of the scope of these additional enforcement powers to be included in the requirements of the new contract.
- 1.5 Also, sufficient time needs to be allowed to complete the re-commissioning process, which would include the work to review and update the service specification. Re-commissioning activity for a service of this size and nature typically takes between 14-18 months as illustrated in the indicative timetable below.

Preparatory Work for Tender	Jul 2022-Jan 2023
Delegated/Chief Officers Approval (Strategy)	Feb-2023
OJEU Notice Issued	March-2023
Tender Response Period	April-May-2023
Evaluation Period	Jun- July -2023
Delegated/Chief Officers Approval (Award)	Sept-23
Contract(s) Award	Oct-23
Mobilisation Period (3 months)	Nov-23 to Jan-24
Contract(s) Start	1 <sup>st</sup> February 2024

## 2 Recommendations

That Cabinet;

- 2.1 Approves the further extension of the current contract with NSL Services Ltd for Civil Parking Enforcement Services (including Vehicle Removals) and for Traffic Regulation Order (TRO) Support for the period 1<sup>st</sup> February 2023 to 31<sup>st</sup> January 2024. The estimated annual value is £3m and will be funded as part of the costs of enforcement from income generated from enforcement activities.



- 2.2 Delegates approval of both the procurement strategy & subsequent contract award for the replacement contract to Cabinet Members for Finance and Resource and for Transport.
- 2.3 Notes the risks and mitigations set out in Exempt Appendix 2.
- 2.4 Authorises the Interim City Solicitor (or their delegate) to execute and complete all necessary legal documents to give effect to the above recommendations.

### **3 Background**

- 3.1 The Council successfully applied for a designation order and adopted the powers contained within the Road Traffic Act 1991; superseded by the Traffic Management Act 2004 (Part 6) to undertake civil parking enforcement, and a vehicle removals operation in Birmingham, with effect from September 2001. Therefore, the Council has a statutory obligation to enforce the parking restrictions in Birmingham. The contract for provision of these services is with NSL Services Ltd which is due to expire on 31st January 2023.
- 3.2 The contract award for the provision of Civil Parking Enforcement Services (including vehicle removals and Traffic Regulation Order support) by NSL Services Ltd was approved by Cabinet on 8<sup>th</sup> December 2014. The contract set out an initial term of five years to 31<sup>st</sup> January 2020 with the option to extend for a further two years. The Acting Strategic Director, Inclusive Growth approved the option to extend for the period to 31<sup>st</sup> January 2022 by delegated approval on 27<sup>th</sup> November 2019.
- 3.3 The contract was extended for a further period of 12 months to 31<sup>st</sup> January 2023 by Cabinet on the 20<sup>th</sup> April 2021 as an amendment to contract within the scope of regulation 72 of the Public Contracts Regulations 2015. The reasons for extension was due to the impact of Covid-19 and the uncertainty regarding the future, together with the need to remain in a strong position to maintain contract stability to deliver the enforcement requirements associated with the Commonwealth Games Summer 2022.
- 3.4 Since the award of this contract, NSL Services Ltd has provided a good service in accordance with contractual requirements. Based on this position it is recommended that the contract is further extended.
- 3.5 It is anticipated that the re-commissioning strategy for replacement service delivery will be presented via the delegations proposed above in February/March of 2023.

### **4 Options Considered and Recommended Proposal**

- 4.1 Re-tender for a 1-year contract – this option was considered and discounted because suppliers are unlikely to take on a contract of this size for a 1 year term. The time and cost to both parties of mobilisation are significant. Suppliers are unlikely to want to invest in this for a 1-year return. The first 6-9 months of a contract of this size is typically non-profit making for the successful provider.
- 4.2 If the contract is not extended, there is insufficient time to adopt the new moving traffic enforcement powers once they have completed public consultations and all other necessary preparations, which includes review of signage and to digitise all Traffic Regulation Orders and to complete the procurement activity for a new tender.

- 4.3 If the contract is extended, it will allow the continued ability to deliver enforcement services whilst work takes place to prepare for a new tender strategy. This is the recommended option.

## **5 Consultation**

- 5.1 Discussions have been held with NSL Services Ltd regarding the potential contract extension.
- 5.2 The Assistant Director, City Operations has been consulted and is in agreement with the contents of the report and officers from City Finance, Corporate Procurement and Legal Services have been involved with the preparation of this report.

## **6 Risk Management**

- 6.1 The risks associated with this contract extension are set out within the Exempt Appendix 2.

## **7 Compliance Issues:**

### **7.1 How are the recommended decisions consistent with the City Council's priorities, plans and strategies?**

7.1.1 This contract will support the following objectives of the Council:

**Birmingham is an entrepreneurial city to learn, work and invest in.**

**Priority 4:- We will develop our transport infrastructure, keep the city moving through walking, cycling and improved public transport.**

- the provision of a high-quality parking enforcement service contributes towards achieving the strategic outcomes of improved traffic management and more reliable public transport.
- the parking enforcement operation assists with improving traffic flow and reliability of journey times by tackling and deterring illegal parking, improving the image of local neighbourhoods.
- By helping to ensure that the road network is kept clear of obstructions to the free flow of vehicle traffic, the parking enforcement and vehicle removal operation both contribute towards tackling the causes of traffic congestion and reducing delays to public transport.

**Birmingham is a great city to live in.**

**Priority 4:- We will improve the environment and tackle air pollution.**

- by deterring illegal parking, the parking enforcement service helps to reduce traffic pollution caused by congestion.

**Priority 5:- We will work with partners to ensure everyone feels safe in their daily lives.**

- the activities of the parking enforcement service provide a visible uniformed presence and help to make the streets safer for pedestrians by tackling illegal obstructive parking and enforcing against illegal parking around schools.
- the parking enforcement service will respond to instances of illegal parking identified by local residents.

#### 7.1.2 Birmingham Business Charter for Social Responsibility (BBC4SR)

NSL Services Ltd has signed up to and has adopted the principles of the Birmingham Business Charter for Social Responsibility. Delivery of their Charter action plan will continue during this extension term.

## 7.2 Legal Implications

- 7.2.1 The authority for the Council to undertake Civil Parking Enforcement is provided in the Statutory Instrument No. 2883 entitled the Road Traffic (Permitted Parking Area and Special Parking Area) (City of Birmingham) Order 2001 made under the provisions for the Road Traffic Act 1991; superseded by Part 6 Traffic Management Act (TMA) 2004 (TMA).
- 7.2.2 Powers to undertake aspects of the vehicle removal function are provided through the Refuse Disposal (Amenity) Act 1978, the Road Traffic Regulation Act 1984, the Removal and Disposal of Vehicles Regulations 1986, the Removal, Storage and Disposal of Vehicles (Prescribed Sums and Charges) Regulations 2008 and the Clean Neighbourhoods and Environment Act 2005.
- 7.2.3 Traffic Regulation Orders (TROs) are implemented by virtue of the Road Traffic Regulation Act 1984.

## 7.3 Financial Implications

- 7.3.1 The report seeks approval to extend the existing contract for one year at an estimated cost of £3m based on existing levels of enforcement activity. This is to be funded within the existing parking enforcement budget and generate income through enforcement activity. The contract cost consists of a fixed element for core services and a variable element for flexibility of deployed hours for Civil Enforcement Officers depending upon increasing/decreasing levels of parking infringements.

## 7.4 Procurement Implications

- 7.4.1 Regulation 72(1)(c) of the Public Contracts Regulations 2015 applies in this instance as follows:
  - I. There is insufficient time to adopt the new moving traffic enforcement powers, which will only be released once the Council has completed public consultations and all other necessary preparations, which includes a review of signage and digitising of

all Traffic Regulation Orders. The delay has not been brought about by the Council which has acted diligently at all times;

- II. the proposed extension does not alter the nature of the contract; and
- III. the value of the proposed extension does not exceed 50% of the original contract value, which was £14m.

7.4.2 The Council will publish a voluntary ex-ante transparency (VEAT) notice in Find a Tender Service setting out the nature and extent of the modifications.

7.4.3 The Council will commence a re-commissioning activity for the provision of the services following Cabinet approval.

## **7.5 Human Resources Implications (if required)**

7.5.1 None

## **7.6 Public Sector Equality Duty**

7.6.1 The requirements of Standing Order No. 9 in respect of the Council's Equal Opportunities Policy have been incorporated into the contract.

7.6.2 The requirements of the Equality Act 2010 have been specifically included in the contract to comply with the Act.

7.6.3 A stage 1 Equalities Report (EAR) was carried out as part of the Tender Strategy for Civil Parking Enforcement Services (P129) report which did not identify any adverse equalities implications within the service which is subject of procurement and therefore was not necessary to progress to a Stage 2. This has been reviewed and nothing has changed since (Appendix 1).

## **8 List of Appendices accompanying this Report (if any):**

8.1 Appendix 1 Equalities Analysis

8.2 Exempt Appendix 2

## **9 Background Documents**

9.1 Tender Strategy for Civil Parking Enforcement Services (P129) – Public Report 14th July 2014.

9.2 Contract Award for Civil Parking Enforcement Services (P129) - Public Report, 8th December 2014.

9.3 Report to Cabinet dated 20 April 2021 - Contract Extension - Civil Parking Enforcement Services (P129)

## Appendix 1

## Parking Services Equality Analysis

## INITIAL SCREENING – STAGE 1

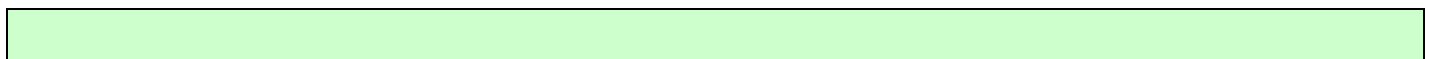
As a public authority we need to ensure that our strategies, policies, functions and services, current and proposed have given due regard to equality and diversity.

Please complete the following questions to determine whether a Full EINA/EQUALITY ANALYSIS is required.

<b>Name of policy, strategy or function:</b> Highways – Parking Services  (Overarching Equality Assessment covering Parking Service Function)	<b>Ref:</b> EC 04 12 PA
--------------------------------------------------------------------------------------------------------------------------------------------------------	-------------------------

<b>Responsible Officer:</b> Jamie Davies  <b>Directorate:</b> Environment & Culture	<b>Role:</b> Chairperson of EINA/EQUALITY ANALYSIS Task Group  <b>Assessment Date:</b> 4 <sup>th</sup> April 2012
-------------------------------------------------------------------------------------------	-------------------------------------------------------------------------------------------------------------------------

<b>Is this a:</b> Policy <input type="checkbox"/> Strategy <input type="checkbox"/> Function <input checked="" type="checkbox"/> Service <input checked="" type="checkbox"/>
<b>Is this:</b> New or Proposed <input type="checkbox"/> Already exists and is being reviewed <input checked="" type="checkbox"/> Is Changing <input type="checkbox"/>





## 1. What are the main aims, objectives of the policy, strategy, function or service and the intended outcomes and who is likely to benefit from it

The Parking Service is a key service provision within Highways and is headed by the Traffic Manager, as required by the Traffic Management Act 2004. The Traffic Manager has responsibility for securing the expeditious movement of traffic on the highway network within Birmingham. The Traffic Manager and his team are responsible directly for all on-street parking, BCC off-street parking facilities in the city centre core area, and has an overview for the remainder of the BCC parking service within the City. Key parking functions are:

- Effective management the City Council's car parking Service.
- Enforcement /implementation of the Traffic Management Act 2004 (Road Traffic Act 1991).
- Managing / reducing congestion
- Compliance with and contribution to the City Council's traffic management and congestion management duty and responsibilities.
- Compliance with the legislation controlling the processing of Penalty Charge Notices.
- Liaising with Emergency Services, Highways Agency and other Traffic Authorities, Statutory undertakers, Public Transport providers, stakeholder groups and highway users.
- Resolving issues affecting disabled users, businesses, faith and religious organisations and taking into account equality issues.
- Manage and maintain the provision of Traffic Regulation Orders.
- The effective management of the delivery of capital parking improvement schemes/initiatives and managing the associated parking revenue budgets
- Compliance with and contribution to the City Council's traffic management and congestion management duty and responsibilities.
- Compliance with the legislation controlling the processing of Penalty Charge Notices.

### **Outcomes** of the Service provision and function:

- High Level of compliance with the Parking Regulations throughout the City resulting in effective traffic flow.
- Effective processing of Penalty Charge Notices.
- The expeditious movement of traffic to facilitate predictable, reliable journey times.
- Minimise congestion and unexpected delays to traffic flow.
- Improve the effective operation of a balanced Transportation Policy
- Input to changes in the design of the highway layout and traffic regulations to take into account the particular requirements of specific highway users.
- Ensure Traffic regulation Orders are managed and maintained to facilitate effective enforcement of traffic regulations.
- Meet statutory obligations in accordance with relevant legislation. The key objectives are derived from the National/ West Midland Local Transport Plan.  
National objectives: reduce congestion, improve accessibility, improve air quality, improve road safety.

Local objectives: economic revitalisation, improve safety and health, contribute to social inclusion, improve transport integration, promote sustainable development and growth.

### **Beneficiaries** are a wide range of customer groups that benefit from this function. They include

- the general public,
- parent groups,
- businesses and trading associations,

- road user groups,
- people with mobility difficulties e.g. Blue badge Holders requiring use of designated Blue Badge bays,
- public transport bodies.

## 2. Explain how the main aims of the policy, strategy, function or service will support the Equality Duties?

1. Eliminate discrimination, harassment and victimisation? ☒
2. Advance equality of opportunity? ☒
3. Foster good relations? ☒
4. Promote positive attitudes towards disabled people? ☒
5. Encourage participation of disabled people? ☒
6. Consider more favourable treatment of disabled people? ☒

There is **no potential adverse** impact on equality as a result of delivery of this service / function and the explanation (with examples) in support of each equality duty is given below:

### 1. Eliminate discrimination, harassment and victimisation

Parking services and associated initiatives are developed not only to serve any one type of stakeholder but their scope is wide ranged to deliver benefits to all protected characteristics of equality. Parking Services fully supports the requirements that need to be met as part of the equality duty e.g. enforcement of blue badge system to prevent abuse, enforcement of use of blue badge parking bays, provision of disabled parking bays both on and off-street bays.

### 2. Advance Equality of Opportunity

In undertaking changes and initiatives with in the Parking Service, where there are specific equality or disability issues the scheme design can be submitted to the Access Committee who can use their expertise to check designs and provide advice on design standards to ensure disability and equality considerations are fully taken into account in developing the final scheme design. All proposed changes to Traffic Regulation Orders which are associated with Parking changes are sent to the Access Committee inviting comment.

### 3. Foster Good Relations

Good relations between various groups in the community are fostered by supporting particular community events. E.g. assisting with parking suspensions for community events. The activity would help to foster good relations in respect of Blue Badge holders as we issue Penalty Charge Notices to those using designated Blue Badge bays who are not badge holders/not displaying a badge.

### 4. Promote Positive attitudes towards Disabled People.

Parking Services seeks to promote positive attitudes towards disabled people by commenting on highway improvement designs. Issues promoted include provision of appropriate footway width, unobstructed footways (including decluttering schemes), provision of pedestrian crossings where appropriate with

appropriate tactile paving /buttons and audible signals for blind and visually impaired, provision of tactile paving at uncontrolled footway crossings. Provision of appropriate disabled parking bays. Provision of disabled bay markings outside residential premises. Implementing pilot scheme to ban parking on footways and verges

5. Encourage participation of disabled people.

All proposed changes to Traffic Regulation Orders associated with Parking changes are sent to the Access Committee for comment. Frontages and any identified interest groups are contacted to seek their views on the proposals. Where relevant works promoters must submit their proposals to Parking Services for checks on scheme design to ensure access issues have been taken into account in the scheme design. Good highway design standards will assist people with mobility difficulties to be move in the public realm and be more active in the community.

A representative of the Traffic Manager regularly attends the Access Committee to pass on information about future events, works and highway changes and to take on board concerns raised in connection with disability access. We also encourage participation of disabled people as more favourable treatment is given to disabled people who hold a Blue Badge. They are provided with designated bays on street and they can also use the City Council's Pay and Display car parks without having to purchase a ticket if they display their badge.

6. Consider more favourable treatment of disabled people

The provision of advisory residential disabled parking bays outside homes of people with disability mobility issues is carried out to recognise that people with specific mobility requirements may require favourable treatment to assist some citizens in fully integrating into the community and taking advantage of local facilities. The provision of appropriate regulatory disabled parking bays in shopping centres in advantageous favourable locations can also assist people with particular mobility requirements to use facilities and promote social inclusion.

**3. Does your policy, strategy, function or service affect:**

Service users	Yes <input checked="" type="checkbox"/>	No <input type="checkbox"/>
Employees	Yes <input checked="" type="checkbox"/>	No <input type="checkbox"/>
Wider community	Yes <input checked="" type="checkbox"/>	No <input type="checkbox"/>

**Please provide an explanation for your 'Yes' or 'No' answer**

As service users, employees and the wider community all have access to the public highway; any changes made will have some form of effect on service users, employees and the wider community. The wider community derives benefits from the service through our effective enforcement strategy e.g. they can find parking space more easily, more efficient traffic flow and safer community by reducing abuse of parking restrictions that could cause accidents to motorists/pedestrians.

However, the affect is **not adverse**. Through the effective commitment, engagement, consultation and monitoring processes, the adverse effect is quantified and then control measures are put in place to minimise its affect.

**4. Are there any aspects of the policy, strategy, function or service, including how it is delivered, or accessed, that could contribute to inequality?** (including direct or indirect discrimination to service users or employees)

Yes ☐

No ☒

**Please provide an explanation for your 'Yes' or 'No' answer**

There will be **no direct or indirect discrimination** to service users or employees.

In undertaking changes to the Parking service or new initiatives, officers are required to demonstrate that they have identified and allocated sufficient resources to meet the implications they are changing. There is no proposed change to this protocol. If the potential for an adverse impact is identified during consultation, an alternative measure will be investigated and, where possible, be incorporated into the design. In all instances, no scheme would be implemented if it did not meet scheme objectives and provide an overall improvement over existing conditions. Achieving those objectives should have a direct and positive impact on equalities

**5. Will the policy, strategy, function or service, have a adverse (negative) impact upon the lives of people, including employees and service users?**

Yes ☐

No ☒

**Please provide an explanation for your 'Yes' or 'No' answer**

Delivery of this service and function **will not have an adverse impact** on the lives of people or service users, as any adverse effects would be highlighted and dealt with as part of the early engagement and consultation process for each proposed scheme.

The decisions taken will ensure that equality requirements are assessed and any funding implications are clearly determined. This will ensure that resources are available to ensure that highway infrastructure is maintained to an appropriate professional and technical standard to serve all forms of equality strands.

## 6. Is an Equality Impact Needs Assessment/Equality Analysis required?

If your answer to question 2 has identified potential adverse impact and you have answered 'yes' to any of the following questions 3, 4, or 5, then you should carry out a Full EINA/EQUALITY ANALYSIS.

Does the Policy, Strategy, Function or Service require a Full EINA/EQUALITY ANALYSIS?    Yes ☐    No ☒

If a Full EINA/EQUALITY ANALYSIS is required, before proceeding you should discuss the scope of the assessment with service managers in your service area as well as the Directorate EINA/EQUALITY ANALYSIS Contact Officer.

If a Full EINA/EQUALITY ANALYSIS is Not required, please sign the declaration below and forward a copy of the Initial Screening to your Directorate EINA/EQUALITY ANALYSIS Contact Officer



## DECLARATION

A Full EINA/EQUALITY ANALYSIS is not required, the Initial Screening has demonstrated that the Policy, Strategy, Function or Service is robust; there is no potential for discrimination or adverse impact. All opportunities to promote equality have been taken.

Chairperson: Jamie Davies

Summary statement:

Sign-off Date: 4<sup>th</sup> April 2012

I have reviewed the initial screening - Stage 1 analysis and concur that it represents the consideration of the Task Group. This demonstrates that the commitment, engagement, consultation and monitoring processes are considered sufficiently robust to eliminate any potential for discrimination or adverse impact as a result of delivering the Parking function and the implementation of initiatives, changes and improvements by Parking Services

Quality check: The screening document has been checked using the agreed audit arrangements in the Directorate:

<p>Name: (Officer/Group carrying out the Quality Check)</p> <p>Lesley Ariss</p> <p>Directorate:</p> <p>Environment and Culture (now known as Local Services Directorate).</p> <p>Contact number:</p> <p>303 9121</p>	<p>Date undertaken:</p> <p>12 April 2012</p>	<p>Screening review statement:</p> <p>The service have advised that they give due regard and consider all relevant groups.</p> <p>There is no change to the service and I confirm there is no requirement to proceed to a Full Eina.</p> <p>I suggest that stakeholders details are included in the Task Group list as we are required to show that we have included these in the review of the service.</p>
----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	----------------------------------------------	--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

### EINA/EQUALITY ANALYSIS Task Group Members

<u>Name</u>	<u>Role on Task Group</u> (e.g. service user, manager or service specialist)	<u>Contact Number</u>
1. Jamie Davies	Chairperson	0121 303 7189
2. Kevin Hicks	Manager	0121 303 7679
3. Bob Wilde	Service Specialist	0121 303 6421
4. Sue Cartwright	Service Specialist	0121 303 7871
5. Stacey Ryans	Service Specialist	0121 303 6427

Birmingham City Council

**Reports not on the Forward Plan / Late Report / Confidential or Exempt Information not Notified**

# **Birmingham City Council**

26 July 022



**Subject:** Hackney Carriage Maximum Fare Tariff Review

**Report of:** Robert James, Strategic Director of City Operations

**Report author:** Sajeela Naseer  
Head of Licensing, Markets, Registration Services and Private Rented Sector  
Telephone No: 07766 924955  
Email Address: sajeela.naseer@birmingham.gov.uk

## **1) Key Decisions not on the Forward Plan / Urgent Decisions**

To be completed for Key Decisions not on the Forward Plan 28 days before the Cabinet meeting at which the decision is to be taken.

<i>Reasons for Urgency / why not included on the notification</i>	Inflationary pressures are so significant that we are having to review the maximum hackney carriage fares immediately otherwise the trade in the city may become unviable
<i>Date Chief Executive Agreement obtained:</i>	13 July 2022
<i>Name, Date and any comments of O&amp;S Chair agreement obtained:</i>	Cllr. Akhlaq Ahmed 14 July 2022

## **2) Key Decisions not notified on the Notification of Intention to Consider Matters in Private**

To be completed for Key Decisions not on the Forward Plan 28 days before the Cabinet meeting at which the decision is to be taken.

<i>Reasons for Urgency / why not included on the notification</i>	[insert reasons] N/A
<i>Name, Date and any comments of O&amp;S Chair agreement obtained:</i>	

### 3) Late Reports

To be completed for all late reports, i.e. which cannot be despatched with the agenda papers i.e. 5 clear working days' notice before meeting.

<i>Reasons for Urgency / why late</i>	[insert reasons] N/A
<i>Date agreement obtained (Executive e.g. Leader and/or CEX):</i>	

wa

# Birmingham City Council

## Report to Cabinet

26 July 2022



**Subject:** Hackney Carriage Maximum Fare Tariff Review

**Report of:** Robert James, Strategic Director of City Operations

**Relevant Cabinet Member:** Councillor Liz Clements, Transportation

**Relevant O &S Chair(s):** Councillor Akhlaq Ahmed, Resources Overview and Scrutiny Committee

**Report author:** Sajeela Naseer  
 Head of Licensing, Markets, Registration Services and Private Rented Sector  
 Telephone No: 07766 924955  
 Email Address: sajeela.naseer@birmingham.gov.uk

Are specific wards affected?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No – All wards affected
Is this a key decision?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No
If relevant, add Forward Plan Reference: 010376/2022		
Is the decision eligible for call-in?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No
Does the report contain confidential or exempt information?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No

### Executive Summary

- 1.1 The purpose of this report is to consider a request from the Hackney Carriage trade to increase the maximum chargeable fares payable by the travelling public for Hackney Carriage journeys and to approve a proposal for consultation with the public.
- 1.2 The setting of fares is a power afforded to the Council and it is the Council's responsibility to strike a balance between setting a fare that is acceptable to the customer and to the taxi driver. Cabinet has the responsibility for decision making.



- 1.3 There are currently 1034 Birmingham-licensed Hackney Carriage Drivers and 680 licensed hackney carriage vehicles. There are more drivers than vehicles as not all licensed driver choose to drive a hackney carriage. A Hackney Carriage driver's licence also permits the driver to drive private hire vehicles.
- 1.4 Three separate proposals have been put forward by the hackney carriage trade asking for an increase in fares:
- The first (Appendix 1) came from a hackney carriage licence holder and was accompanied by an approximate 230 person signed petition from hackney carriage drivers with accompanying hackney carriage licence badge numbers.
  - The second (Appendix 2) and third proposal (Appendix 3) came from the Rail, Maritime and Transport Workers (RMT) union. RMT's Proposal 3 supersedes their Proposal 2.
- 1.5 Officers have considered the three proposals and suggest that an amended version of Proposal 3 is pursued for consultation. This Proposal 4 to be called the "2022 Proposed Maximum Fare Tariff" and is shown in Appendix 4.
- 1.6 It must be emphasised this is the first report in a series of a strategic measures covering the role of the hackney carriage and taxi trade in the City's Transport Strategy. This tariff has been brought forward in light of the declining numbers of hackney carriages in the City and significant increase in the price of fuel.

## **2. Recommendations**

- 2.1 That Cabinet approves Proposal 4 "2022 Proposed Maximum Fare Tariff" shown in Appendix 4 as the preferred tariff for consultation.
- 2.2 That Cabinet approves the commencement of the statutory public consultation in accordance with Section 65 of the Local Government (Miscellaneous Provisions) Act 1976 for a period of not less than fourteen days to allow for objections to be made.
- 2.3 That Cabinet approves implementation on 30 September 2022 should no objections be made during the statutory consultation period referred to in section 2.2. If objections are received, a further report will be submitted to allow Cabinet to consider the objections raised and to further consider the tariffs proposed.

### 3 Background

- 3.1 Section 65 of the Local Government (Miscellaneous Provisions) Act 1976 provides that a district council may fix the maximum rate of fares within the District and all other charges in connection with the hire of a Hackney Carriage vehicle; this is done by means of a table which is to be referred to as “the table of fares”. Private Hire vehicles are able to set their own fares and are therefore not the subject of this report.
- 3.2 The local authority controls the maximum fares charged by hackney carriages. This is enforced through the use of a meter for all journeys, which measures a combination of time and distance travelled.
- 3.3 The Department of Transport suggests that in reviewing fares authorities should pay particular regard to the needs of the travelling public, with reference both to what it is reasonable to expect people to pay but also to the need to give Hackney Carriage drivers sufficient incentive to provide a service when it is needed. There may well be a case for higher fares at times of higher demand.
- 3.4 Any changes to the table of fares must be decided by Cabinet and published in accordance with Section 65 for a period of not less than fourteen days to allow for objections to be made. In the event that any objections are received within the period allowed, and not withdrawn, then the Council must set a further date not later than two months after the first specified date for the table of fares to come into effect with or without modifications as described by them.
- 3.5 The powers to set a maximum fare were considered by the Office of Fair Trading in its report in November 2003. The Government in its response to the report made it clear that it recognised that there was a strong case for negotiating the maximum level of fares in order to protect the interests of the consumers and recommended that local authorities should continue to exercise these powers.
- 3.6 The Hackney Carriage maximum tariffs have not been changed in Birmingham since June 2012 when the current tariffs were approved.
- 3.7 Officers have taken the following guidance into consideration when considering the maximum fare tariffs proposed:
- Law Commission Report  
[https://s3-eu-west-2.amazonaws.com/lawcom-prod-storage-11jsxou24uy7q/uploads/2015/03/lc347\\_taxi-and-private-hire-services.pdf](https://s3-eu-west-2.amazonaws.com/lawcom-prod-storage-11jsxou24uy7q/uploads/2015/03/lc347_taxi-and-private-hire-services.pdf)

- Office of Fair Trading Report  
[https://webarchive.nationalarchives.gov.uk/20140402181227/http://www.oft.gov.uk/shared\\_oftr/reports/comp\\_policy/oft676.pdf](https://webarchive.nationalarchives.gov.uk/20140402181227/http://www.oft.gov.uk/shared_oftr/reports/comp_policy/oft676.pdf)
- Department for Transport  
[https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment\\_data/file/212554/taxi-private-hire-licensing-guide.pdf](https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/212554/taxi-private-hire-licensing-guide.pdf)
- Competition and Markets Authority report dated April 2017  
[https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment\\_data/file/624539/taxi\\_phv\\_la\\_guidance.pdf](https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/624539/taxi_phv_la_guidance.pdf)

#### **4.0 Maximum Fare tariff**

- 4.1 Three requests have been made that Birmingham City Council considers an increase in maximum chargeable Hackney Carriage fares. The last rise in maximum fares took effect in June 2012 and the current fare table is shown in appendix 5.
- 4.2 Proposal 1 is in Appendix 1 and is based on replacing the current tariff 1 with the tariff 2.
- 4.3 Proposal 2 is shown in Appendix 2 and uses the current fare tariff and economic data as a basis for proposed fare increases. Proposal 2 has now been withdrawn by the submitters (RMT Union).
- 4.4 Proposal 3 is shown in Appendix 3 and uses the current fare tariff and economic data as a basis for proposed fare increases. Proposal 3 is the proposal submitted by the RMT Union.

#### **5. Analysis of the three proposals**

- 5.1 Proposal 1 is a very basic proposal that will increase fares significantly for all customers during normal daytime hours. There is no explanation of the methodology used behind the proposal other than to increase the maximum fare tariff to meet the increase costs of fuel.
- 5.2 Proposal 2 is a more nuanced approach to putting forward potential increases. It builds on the current tariff system to proposed increases to both the flag charges for tariff 1 and 2 (pick up charge), and the cost per first mile for tariff 1, 2 and 3 and increases in cost per mile for mileage thereafter and waiting and time charges for tariff 1. It compares the proposal put forward with both Consumer Price Index and Retail Price Index for the last 10 years.

It also proposed new charges for carriage of a pet (not in a pet carrier) and carriage of bulky items (greater than 0.5 cubic metres). Furthermore, the proposal seeks to change the time of the commencement of tariff 2 from 23.00 hours to 22.00 hours.

There is a proposal to change the operational start time of Tariff Three from 23:00 to 22:00 hrs. On Christmas Eve and on New Year's Eve there is a proposed start time of Tariff Three to change from 19.00 to 18.00hrs. The current start time of Tariff Three on Christmas Eve and New Year's Eve is 19.00hrs.

This proposal has been withdrawn by the RMT on the basis that further increases in the price of diesel has required the increases shown in Proposal 3.

- 5.3 Proposal 3 is very similar to proposal 2 but proposes greater increases in both the flag charges and cost per first mile for all four tariffs and cost per mile for mileage thereafter for tariff 1 and 4 and waiting and time charges for tariff 1.

## **6. Options Considered and Recommended Proposal**

- 6.1 Cease regulating fares - Hackney Carriages are unique in that they can be hailed from the street or picked up from a rank. Where a journey is pre booked the hirer has the opportunity to compare and negotiate a price. This opportunity does not exist in the same way when picking up a taxi from a rank and increases the risk of confusion and dispute. Vulnerable customers are more exposed to exploitation. Currently only a handful of Local Authorities in England choose this option. The setting of a maximum fare by the local authority adds protection for the consumer.
- 6.2 No change – given that there has not been an increase to tariffs in the last 10 years and drivers are currently being negatively impacted by inflationary pressures this option is not viable.
- 6.3 Introduction of a new methodology – Fare scales should be designed with a view to practicality. A simple formula for deciding on fare revisions would increase understanding and improve the transparency of the process. Some local authorities have devised a specific methodology with which to review fare tariffs. While this is an option officers would like to consider in the future, this will take a significant amount of time and hence we do not believe it is appropriate to pursue this at the moment.
- 6.4 Put proposal 1, 2 and 3 to the trade – while this is a valid option it is likely to result in no consensus and hence no progression to an actual agreed maximum fare tariff.

- 6.5 Put Proposal 1, 2 or 3 to public consultation - we have considered the proposals and consider that Proposals 2 and 3 are clearly well thought out proposals and use the current fare tariffs as a starting point for building increases. It is considered that Proposal 3 is more likely to be supported by drivers and officers have received an indication from the submitter of Proposal 1 that he and his “colleagues” would support Proposal 3 if:

Tariff 1: Standard Day Rate applicable Monday to Friday was applicable from 07:00 hours to 19:00 hours AND on Saturday: from 07:00 hours to 19:00 hours  
Tariff 3: weekend night rate applicable Friday and Saturday- from 19:00 hours to 07:00 hours AND Extra Charges: a 20p transaction fee for all card users.

- 6.6 Having considered all 3 proposals and the feedback from the submitter of Proposal 1 we have adapted Proposal 3 to form a new **Proposal 4 “2022 Proposed Maximum Fare Tariff”** which is shown in Appendix 4. Proposal 4 is the same as Proposal 3 but omitting the following items:

- Omit proposed charge for carriage of a pet (not in a pet carrier). REASON – such a charge would be more likely to impact on the users of assistance dogs where there may be disputes with the driver about whether a dog is for assistance.
- Omit proposed charge for carriage of bulky items greater than 0.5 cubic metres). REASON – items of this size should not be carried for health and safety reasons. Furthermore, disputes may arise with the driver about whether the charge should apply dependent on the perceived size of the article.
- Omit proposed tariff 3 time change from 19.00 to 18.00 hours on Christmas Eve and on New Year’s Eve. REASON – it is considered it would not be appropriate to commence the weekend night rate (tariff 3) this early in the evening.

Officers recommend that changes proposed by the proposer of Proposal 1 in terms of changing the start time of tariffs 2 and 3 (night time tariffs) are appropriate as it is not agreed night time starts at 19.00 hours. A charge being made for a card transaction cannot be supported as this is illegal under the Consumer Rights (Payment Surcharges) Regulations 2012 (as amended).

- 6.7 It is recommended that **Proposal 4 “2022 Proposed Maximum Fare Tariff”** supports a balanced approach when looking at increasing fares and the impact on customers, given that the fare tariff has not increased for 10 years.



- 6.8 The Private Hire and Taxi Monthly (PHTM) publishes a table of hackney carriage fares at tariff one over 2 miles. It measures this fare across 355 local authorities in England. Birmingham is number 166 on the list with a fare of £6.20.

Should Proposal 4 be implemented the charge would increase to £7.60 and Birmingham's would be equivalent to the fare charges by numbers 18 to 23 in this table. The fare table can be found at [Hackney Taxi Fare Tables \(phtm.co.uk\)](http://phtm.co.uk)

## 7.0 Consultation

- 7.1 If the recommendations are approved then Proposal 4 "2022 Proposed Maximum Fare Tariff" will be published for public comment in accordance with Section 65 of the Local Government (Miscellaneous Provisions) Act 1976 for a period of not less than fourteen days to allow for objections to be made.
- 7.2 Birmingham City Council Route to Net Zero team have been consulted and have confirmed that a Environmental and Sustainability Assessment is not required for this fare review.

## 8. Risk Management

- 8.1 The Hackney Carriage trade would like a fare increase as soon as possible. While their motivations are understood given current inflationary pressures, it is essential that the City Council ensures legislative requirements to consult appropriately and consider the responses to that consultation are met otherwise the approval of new tariffs may be susceptible to legal challenge.
- 8.2 After approval of the new tariffs and the expiry of the minimum 14-day public consultation period (with no objections) all 680 hackney carriages will require their meters to be reset. This means that it is likely that this whole process will take between 6-8 weeks from approval of this Cabinet report, allowing for potential call-in, if there are no objections to the proposal.

## 9.0 Compliance Issues

- 9.1 How are the recommended decisions consistent with the Council's policies, plans and strategies?

### 9.1.1 Council Plan

- 9.1.2 The Council's vision is to be a City of growth where every child, citizen and place matters – It wants to make a positive difference, every day, to people's lives. This aim underpins everything we do, whether that's setting our priorities, making decisions or delivering services. There are eight outcomes to achieve that vision.

Outcome 4 - Birmingham is a great, clean and green city:

The provision of a hackney carriage transport offers reduced personal car use. Use of hackney carriages increases the safety of lone travelers especially at night.

## **9.2 Legal Implications**

- 9.2.1 Section 65 of the Local Government (Miscellaneous Provisions) Act 1976 provides that in respect of the charges for Hackney Carriages, the Council “may fix the rates or fares within the district as well for time as distance, and all other charges in connection with the hire of a vehicle...by means of a table”
- 9.2.2 It is a legal requirement of the 1976 Act that when the Council makes or varies a table of fares that it publishes in at least one local newspaper circulating in the district a notice setting out the table of fares, or the variations. The notice must give a specified period, of not less than 14 days, within which objections can be made.
- 9.2.3. If no objections to the table of fares or the variation are received the table of fares or the variations shall come into operations on the date of the expiration of the period specified in the notice.
- 9.2.4. If objections are received, and not withdrawn, the Council shall set a further date, no later than two months after the first specified date, on which the table of fares shall come into force with or without modifications as decided by the Council after consideration of the objections.
- 9.2.5 The decision in the case of Mark Rostron v. Guildford Borough Council [2017] EWHC 3141 (Admin) (in which a judicial review was brought in respect of the local authority’s proposal to reduce fares previously chargeable) highlights the need for fares proposed to be capable of economic justification and explanation if challenged.

## **9.3 Financial Implications**

- 9.3.1 There are no financial implications for the Council. The consultation will be undertaken by existing officer resource and no additional budget is required for this. The cost of administering the hackney carriage licence scheme is funded through licence fee income on a cost recovery basis.
- 9.3.2 The resource cost of administering this fare review and implementing any meter changes will be considered as a cost of administering the hackney carriage licence scheme and as such will be included in any subsequent licence fee review.

#### **9.4 Procurement Implications**

9.4.1 No procurement issues have been identified

#### **9.5 Human Resources Implications**

9.5.1 All human resource issues will be within existing officer resource.

#### **9.6 Public Sector Equality Duty**

9.6.1 An equality assessment has been undertaken and is found in Appendix 6

9.6.2 All groups would see an equal rise in the fares that they pay to use Hackney Carriages should an increase be decided. There is potential for an increase in fares to impact disproportionately on people with disabilities, in particular wheelchair users. This potential negative impact could be driven by Hackney Carriage fares being too low and causing drivers to cease providing the service or fares being too high and this limiting the ability of users of the service. It is therefore necessary to balance any fare increases carefully. On balance it is considered the proposed tariff increases is likely to ensure the service for disabled passengers is maintained rather than withdrawn due to lower tariff availability causing hackney carriages to be taken off the road. This is likely to be more positive in equalities terms than the increase itself.

### **Appendices**

Appendix 1 – Proposal 1

Appendix 2 – Proposal 2

Appendix 3 – Proposal 3

Appendix 4 – Proposal 4 “2022 Proposed Maximum Fare Tariff”.

Appendix 5 – Current Birmingham Hackney Carriage Fare Table

Appendix 6 – Equality Assessment



## APPENDIX 1

Hi Mrs. [REDACTED]

Thank you for your response with regards to the Fare Increase Proposals. [REDACTED]  
[REDACTED]  
[REDACTED]  
[REDACTED]

[REDACTED] We have submitted an excess of 230+ signatures {including TOA drivers} who believe we have the strongest proposal that will be more beneficial to suit the needs of all the Hackney Carriage Trade.

Increasing the Fare by a minor amount will be insufficient to solve this ongoing issue as there has been no increase in fares for approximately 12+ years. The cost of the constant daily rise and cost of living, and maintenance of vehicles is the major contributor to our request.

The General Public are familiar and are already making use of Tariff 2 and 3 and as we are already using these, our increase will not affect Trade.

Since submitting our proposal it now seems somewhat obsolete, as card payment charges, higher purchase loan payments on upgrading taxis, and CAZ charge it would be inconceivable to accept anything less than our proposal.

We believe in order to avoid misconceptions or disagreement on the increase, should the need arise, we suggest a postal ballot be made available giving the Trade details of both proposals and drivers to make a choice, this would allow the increase to be fair and unbiased.

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Kind Regards

*{on behalf of all my colleagues}*





## Information in Support of a Variation in the Hackney Carriage Table of Fares

1. The Hackney Carriage trade respectfully ask Birmingham City Council Licensing Committee for a variation in the Hackney Carriage Table of Fares.
2. The last increase in the Hackney Carriage Table of Fares was February 2012 and was implemented in **June 2012**.
3. It is now approaching **10** years since the Hackney Carriage trade applied for an increase in the Table of Fares.
4. This application for a variation in the Hackney Carriage Table of Fares is for an increase in Distance Charges on **Tariffs One, Two and Three**.
5. There is a proposal for an increase in the Initial Charge (**The Flag Drop**) for Tariff One from **£2.20** to **£2.40**, an increase of **£0.20p**.
6. On Tariff One the proposed variation in Distance Charges equates to an average percentage increase in the aggregate proposed fares at one mile distances for the first ten miles of **10.7%**. This represents a proposed increase of **1.0%** per annum for the last 10 years since the last application for a variation in the Table of Fares in **February 2012**.
7. The proposed variation in Waiting Time Charges on Tariff One is an increase of **68** pence per hour which equates to a percentage increase of **4.3%**. This represents a proposed increase of **0.4%** per annum for the last **10** years since the last application for a variation in the Table of Fares in **February 2012**.
8. There is a proposal to change the operational **end time** of Tariff One from **23:00hrs** to **22:00hrs**. Current **end time** for Tariff One is **23:00hrs**.
9. There is a proposal for an increase in the Initial Charge (**The Flag Drop**) for Tariff Two from **£2.40** to **£2.60**, an increase of **£0.20p**.
10. On Tariff Two the proposed variation in Distance Charges equates to an average percentage increase in the aggregate proposed fares at one mile distances for the first ten miles of **3.7%**. This represents a proposed increase of **0.4%** per annum for the last **10** years since the last application for a variation in the Table of Fares in **February 2012**.
11. The Hackney Carriage trade are not seeking an increase in Waiting Time Charges on Tariff Two.
12. There is a proposal to change the operational **start time** of Tariff Two from **23:00hrs** to **22:00hrs**. Current **start time** for Tariff Two is **23:00hrs**.
13. On Tariff Three the proposed variation in Distance Charges equates to an average percentage increase in the aggregate proposed fares at one mile distances for the first ten miles of **1.6%**. This represents a proposed increase of **0.2%** per annum for the last **10** years since the last application for a variation in the Table of Fares in **February 2012**.

**14.** There is a proposal to change the operational **start time** of Tariff Three from **23:00hrs** to **22:00hrs**. Current **start time** for Tariff Three is **23:00hrs**. On Christmas Eve and on New Years Eve we propose the **start time** of Tariff Three change from **19.00hrs** to **18.00hrs**. The current start time of Tariff Three on Christmas Eve and New Years Eve is **19.00hrs**.

**15.** On Tariff Four we propose no variation from the existing Tariff Four.

**16.** The Hackney Carriage trade are not seeking an increase in Time Charges on Tariff Four.

**17.** The Hackney Carriage trade is not seeking an increase in the Soilage Charge on any of the tariffs.

**18.** The existing Table of Fares mandates that night tariffs finish at **04.00hrs** on weekday mornings and at **07.00hrs** on Saturday and Sunday mornings. The Hackney Carriage trade is not seeking any changes.

**19.** The percentage changes in the Consumer Price Index [**All Items**] over **12 Month** periods from **February 2012** (the date of the last application for a variation in the Table of Fares) to February 2021 are provided by the ONS website, for example:

- February 2012 to February 2013; **+ 2.4%**
- February 2013 to February 2014; **+ 1.4%**
- February 2014 to February 2015; **+ 0.0%**
- February 2020 to February 2021; **+ 3.4%**

This information is from the Office for National Statistics website.

This represents a total percentage increase of **17.00%** in the Consumer Price Index for the **10 year** period from **February 2012** (the date of the last application for a variation in the Table of Fares) to **February 2021**

**Source;**

**<https://www.ons.gov.uk/economy/inflationandpriceindices/timeseries/ead6/mm23>**

**20.** The percentage changes in the Retail Prices Index [**All Items**] over **12 Month** periods from **February 2012** (the date of the last application for a variation in the Table of Fares) to **February 2021** are provided by the ONS website, for example:

- February 2012 to February 2013; **+ 3.0 %**
- February 2013 to February 2014; **+ 2.4 %**
- February 2014 to February 2015; **+ 1.0 %**
- February 2020 to February 2021; **+ 4.1 %**

This information is from the Office for National Statistics website.

This represents a total percentage increase of **25.8%** in the Retail Price Index for the **10 year** period from **February 2012** (the date of the last application for a variation in the Table of Fares) to **February 2021**.

Source;

<https://www.ons.gov.uk/economy/inflationandpriceindices/timeseries/czeq/mm23>

**21.** The Hackney Carriage trade is seeking an increase in Extra Charges on all of the tariffs for the carriage of domestic pets outside of suitable pet carriers, bulky items such as domestic & office furniture, domestic & commercial appliances, bicycles, boxed items with a total volume equal to or in excess of **0.5** cubic metres.

- **£5.00** is justified for carriage of pets for cleaning the vehicle afterwards.

- **£15.00** is justified for carriage of bulky items such as washing machines, televisions, Mattresses, etc. The list is not exhaustive and refers to situations where a 'man-with-a-van' or an actual removal company would be most appropriate.

**22.** Since the last application for an increase in the Table of Fares, living costs have escalated noticeably and household bills continue to increase.

**23.** Hackney Carriage proprietors can no longer continue to absorb these relentless increases in operating costs and overheads and drivers also need to balance their household budgets.

**24.** The Hackney Carriage trade therefore respectfully ask that the Licensing Committee approve the proposed increase in the Table of Fares, not only to enable Hackney Carriage proprietors to arrest their spiralling operating costs and thereby continue to maintain their vehicles to the high standards required for the travelling public's safety, but also to help all drivers in the trade to try to preserve a minimum standard of living.

**25.** The Hackney Carriage trade would like to highlight the importance of an increase in tariff for Hackneys to continue as a viable form of employment in view of the fact that Hackney numbers have now dropped to an alarming low of **647**.

# SUMMARY of PROPOSED VARIATIONS in the HACKNEY CARRIAGE TABLE of FARES

	TARIFF ONE	TARIFF TWO	TARIFF THREE	TARIFF FOUR
<b>INITIAL CHARGE - FLAG DROP;</b> Current Flag Drop: <b>PROPOSED FLAG DROP:</b> <b>CHANGES</b>	£2.20 £2.40 20p INCREASE	£2.40 £2.60 20p INCREASE	£2.60 £2.60 NO CHANGE	£3.00 £3.00 NO CHANGE
<b>FIRST MILE;</b> Current First Mile Charge: <b>PROPOSED FIRST MILE CHARGE:</b> <b>CHANGES</b> (First Mile)	£4.40 £5.20 80p INCREASE	£4.80 £5.20 40p INCREASE	£5.20 £5.40 20p INCREASE	£6.30 £6.30 NO CHANGE
<b>MILEAGE CHARGE</b> (Thereafter); Current Mileage Charge: <b>PROPOSED MILEAGE CHARGE:</b> <b>CHANGES</b> (per Mile)	£1.80 £1.92 12p INCREASE	£2.04 £2.04 NO CHANGE	£2.21 £2.21 NO CHANGE	£2.72 £2.72 NO CHANGE
<b>WAITING &amp; TIME CHARGES;</b> Current Time Charges per Hour: <b>PROPOSED TIME CHARGES per HOUR:</b> <b>CHANGES</b> (per Hour)	£15.72 £16.80 £1.08 INCREASE	£18.00 £18.00 NO CHANGE	£19.50 £19.50 NO CHANGE	£24.00 £24.00 NO CHANGE
<b>SOILAGE CHARGES;</b> Current Soilage Charges: <b>PROPOSED SOILAGE CHARGES:</b>	£40.00 £40.00 NO CHANGE	£40.00 £40.00 NO CHANGE	£40.00 £40.00 NO CHANGE	£60.00 £60.00 NO CHANGE
<b>EXTRA CHARGES;</b>	YES	YES	YES	YES



# BIRMINGHAM CITY COUNCIL HACKNEY CARRIAGE - TABLE of FARES

**It is a criminal offence TO NOT PAY THE TAXI FARE, which is covered by The Theft Act 1968, The Theft Act 1978 and The Fraud Act 2006.**

The taximeter is programmed to select the correct tariff automatically, from the tariffs as detailed below, depending on the date, day and time of day that the Hackney Carriage is being hired using real time clock tariff changes in hired mode.

<b>TARIFF ONE: STANDARD DAY RATE</b> Applicable Monday to Saturday From 07.00hrs to 22.00hrs (EXCEPT for those days and times as specified in Tariffs Two, Three and Four)	<b>TARIFF TWO: WEEKDAY NIGHT RATE</b> Applicable Sunday to Thursday - From 22.00hrs to 04.00hrs the next day AND on Sunday - From 07.00hrs to 22.00hrs AND All Bank Holidays - From 00.00hrs to 22.00hrs. (EXCEPT for those days and times as specified in Tariffs Three & Four)
<b>TARIFF THREE: WEEKEND NIGHT RATE</b> Applicable Friday and Saturday - From 22.00hrs to 07.00hrs the next day AND on Boxing Day - From 00.00hrs to 24.00hrs AND on Christmas Eve - From 18.00hrs to 24.00hrs AND on New Year's Eve - From 18.00hrs to 24.00hrs	<b>TARIFF FOUR: CHRISTMAS &amp; NEW YEAR SEASON</b> Applicable on Christmas Day and New Year's Day On Christmas Day - From 00.00hrs to 24.00hrs A N D On New Year's Day - From 00.00hrs to 07.00hrs

The fare is shown on the taximeter, which records on the basis of time or distance at the following rates.

	<b>TARIFF ONE</b>	<b>TARIFF TWO</b>	<b>TARIFF THREE</b>	<b>TARIFF FOUR</b>
<b>INITIAL CHARGES:</b> A charge of For the first or part thereof	£2.40 187.5 yards	£2.60 195.6 yards	£2.60 180.5 yards	£3.00 220 yards
<b>MILEAGE CHARGES:</b> A charge of For each subsequent or part thereof until have been travelled.	30p 125.0 yards 937.5 yards	30p 97.8 yards 586.8 yards	30p 90.3 yards 541.7 yards	30p 110 yards 770 yards
Thereafter: A charge of For each subsequent or part thereof Equivalent to a rate per mile of	20p 183.3 yards £1.92	20p 172.5 yards £2.04	20p 159.3 yards £2.21	30p 194.1 yards £2.72
<b>WAITING &amp; TIME CHARGES:</b> A charge of For each or part thereof Equivalent to an hourly rate of	30p 20p 64.2 sec 42.8 sec £16.80	30p 20p 60.0 sec 40.0 sec £18.00	30p 20p 55.3 sec 36.9 sec £19.50	30p 45.0 secs £24.00
<b>SOILAGE CHARGES:</b> An additional charge may be made in the event of <b>SOILAGE OR FOULING OF THE VEHICLE</b>	£40.00	£40.00	£40.00	£60.00

<b>EXTRA CHARGES:</b>	
For every person in excess of one	20p
For every article of luggage carried outside the passenger compartment	20p
Carriage of any pets (outside of any pet carriers / containers)	£5.00
Carriage of any Bulky Items / Removals	£15.00
Any road toll or barrier charge incurred in the execution of the hiring	

## COMPLAINTS

Any complaint of overcharging, or about this taxi or taxi driver, should be sent in writing to the Enforcement Section, Birmingham City Council, Phoenix House, Valepits Road, Garretts Green, Birmingham B33 0TD, or by telephoning 0121 303 9611, quoting the number of the taxi and the number of the driver's badge. Enquiries regarding property accidentally left in a taxi should be made at the nearest West Midlands Police Station.

# H00000

MARCH 2022

# TARIFF ONE COMPARISON; PROPOSED FARES against CURRENT FARES

DAY RATE Monday to Friday 04.00hrs to 23.00hrs AND Saturday 07.00hrs to 23.00hrs		DAY RATE Monday to Saturday 04.00hrs to 23.00hrs		COMPARISON: PROPOSED and CURRENT FARES at DISTANCES in WHOLE MILES			
CURRENT FARE TARIFF 1 (£1.80 per mile)		PROPOSED FARE TARIFF 1 (£1.92 per mile)		DISTANCE TRAVELLED in WHOLE MILES	CURRENT FARE at THIS DISTANCE	PROPOSED FARE at THIS DISTANCE	PERCENT INCREASE of PROPOSED FARE
Distance in Yards	Fare at This Distance	Distance in Yards	Fare at This Distance				
<b>Flag; 0</b>	<b>£ 2.20</b>	<b>Flag; 0</b>	<b>£ 2.40</b>				
<b>187.5</b>	<b>£ 2.40</b>	<b>187.5</b>	<b>£ 2.70</b>				
<b>312.5</b>	<b>£ 2.60</b>	<b>312.5</b>	<b>£ 3.00</b>				
<b>437.5</b>	<b>£ 2.80</b>	<b>437.5</b>	<b>£ 3.30</b>				
<b>562.5</b>	<b>£ 3.00</b>	<b>562.5</b>	<b>£ 3.60</b>				
<b>687.5</b>	<b>£ 3.20</b>	<b>687.5</b>	<b>£ 3.90</b>				
<b>812.5</b>	<b>£ 3.40</b>	<b>812.5</b>	<b>£ 4.20</b>				
<b>937.5</b>	<b>£ 3.60</b>	<b>937.5</b>	<b>£ 4.40</b>				
<b>1,062.5</b>	<b>£ 3.80</b>	<b>1,120.8</b>	<b>£ 4.60</b>				
1,258.1	£ 4.00	<b>1,304.1</b>	<b>£ 4.80</b>	<b>1 mile = 1760 yards</b>			
1,453.7	£ 4.20	<b>1,487.4</b>	<b>£ 5.00</b>	<b>1</b>	<b>£ 4.40</b>	<b>£ 5.20</b>	<b>18.18%</b>
<b>1,649.3</b>	<b>£ 4.40</b>	<b>1,670.7</b>	<b>£ 5.20</b>				
1,844.9	£ 4.60	<b>1,854.0</b>	<b>£ 5.40</b>				
2,040.5	£ 4.80	<b>2,037.3</b>	<b>£ 5.60</b>				
2,236.1	£ 5.00	<b>2,220.6</b>	<b>£ 5.80</b>				
2,431.7	£ 5.20	<b>2,403.9</b>	<b>£ 6.00</b>				
2,627.3	£ 5.40	<b>2,587.2</b>	<b>£ 6.20</b>				
2,822.9	£ 5.60	<b>2,770.5</b>	<b>£ 6.40</b>				
3,018.5	£ 5.80	<b>2,953.8</b>	<b>£ 6.60</b>				
3,214.1	£ 6.00	<b>3,137.1</b>	<b>£ 6.80</b>	<b>2 miles = 3520 yards</b>			
<b>3,409.7</b>	<b>£ 6.20</b>	<b>3,320.4</b>	<b>£ 7.00</b>	<b>2</b>	<b>£ 6.20</b>	<b>£ 7.20</b>	<b>16.13%</b>
3,605.3	£ 6.40	<b>3,503.7</b>	<b>£ 7.20</b>				
3,800.9	£ 6.60	<b>3,687.0</b>	<b>£ 7.40</b>				
3,996.5	£ 6.80	<b>3,870.3</b>	<b>£ 7.60</b>				
4,192.1	£ 7.00	<b>4,053.6</b>	<b>£ 7.80</b>				
4,387.7	£ 7.20	<b>4,236.9</b>	<b>£ 8.00</b>				
4,583.3	£ 7.40	<b>4,420.2</b>	<b>£ 8.20</b>				
4,778.9	£ 7.60	<b>4,603.5</b>	<b>£ 8.40</b>				
4,974.5	£ 7.80	<b>4,786.8</b>	<b>£ 8.60</b>	<b>3 miles = 5280 yards</b>			
<b>5,170.1</b>	<b>£ 8.00</b>	<b>4,970.1</b>	<b>£ 8.80</b>	<b>3</b>	<b>£ 8.00</b>	<b>£ 9.00</b>	<b>12.50%</b>
5,365.7	£ 8.20	<b>5,153.4</b>	<b>£ 9.00</b>				
5,561.3	£ 8.40	<b>5,336.7</b>	<b>£ 9.20</b>				
5,756.9	£ 8.60	<b>5,520.0</b>	<b>£ 9.40</b>				
5,952.5	£ 8.80	<b>5,703.3</b>	<b>£ 9.60</b>				
6,148.1	£ 9.00	<b>5,886.6</b>	<b>£ 9.80</b>				
6,343.7	£ 9.20	<b>6,069.9</b>	<b>£ 10.00</b>				
6,539.3	£ 9.40	<b>6,253.2</b>	<b>£ 10.20</b>				
6,734.9	£ 9.60	<b>6,436.5</b>	<b>£ 10.40</b>				



# TARIFF ONE COMPARISON; PROPOSED FARES against CURRENT FARES

CURRENT FARE TARIFF 1 (£1.80 per mile)		PROPOSED FARE TARIFF 1 (£1.92 per mile)		DISTANCE TRAVELLED in WHOLE MILES	CURRENT FARE at THIS DISTANCE	PROPOSED FARE at THIS DISTANCE	PERCENT INCREASE of PROPOSED FARE
Distance in Yards	Fare at This Distance	Distance in Yards	Fare at This Distance				
<b>6 930.5</b>	<b>£ 9.80</b>	6,619.8	£ 10.60	<b>4 miles = 7040 yards</b>			
7,126.1	£ 10.00	<b>6 803.1</b>	<b>£ 10.80</b>	<b>4</b>	<b>£ 9.80</b>	<b>£ 11.00</b>	<b>12.24%</b>
7,321.7	£ 10.20	<b>6,986.4</b>	<b>£ 11.00</b>				
7,517.3	£ 10.40	7,169.7	£ 11.20				
7,712.9	£ 10.60	7,353.0	£ 11.40				
7,908.5	£ 10.80	7,536.3	£ 11.60				
8,104.1	£ 11.00	7,719.6	£ 11.80				
8,299.7	£ 11.20	7,902.9	£ 12.00				
8,495.3	£ 11.40	8,086.2	£ 12.20				
<b>8 690.9</b>	<b>£ 11.60</b>	8,269.5	£ 12.40	<b>5 miles = 8800 yards</b>			
8,886.5	£ 11.80	<b>8 452.8</b>	<b>£ 12.60</b>	<b>5</b>	<b>£ 11.60</b>	<b>£ 12.80</b>	<b>10.34%</b>
9,082.1	£ 12.00	<b>8,636.1</b>	<b>£ 12.80</b>				
9,277.7	£ 12.20	8,819.4	£ 13.00				
9,473.3	£ 12.40	9,002.7	£ 13.20				
9,668.9	£ 12.60	9,186.0	£ 13.40				
9,864.5	£ 12.80	9,369.3	£ 13.60				
10,060.1	£ 13.00	9,552.6	£ 13.80				
10,255.7	£ 13.20	9,735.9	£ 14.00				
<b>10 451.3</b>	<b>£ 13.40</b>	9,919.2	£ 14.20	<b>6 miles = 10560 yards</b>			
10,646.9	£ 13.60	10,102.5	£ 14.40	<b>6</b>	<b>£ 13.40</b>	<b>£ 14.80</b>	<b>10.48%</b>
10,842.5	£ 13.80	<b>10 285.8</b>	<b>£ 14.60</b>				
11,038.1	£ 14.00	<b>10,469.1</b>	<b>£ 14.80</b>				
11,233.7	£ 14.20	10,652.4	£ 15.00				
11,429.3	£ 14.40	10,835.7	£ 15.20				
11,624.9	£ 14.60	11,019.0	£ 15.40				
11,820.5	£ 14.80	11,202.3	£ 15.60				
12,016.1	£ 15.00	11,385.6	£ 15.80				
<b>12 211.7</b>	<b>£ 15.20</b>	11,568.9	£ 16.00	<b>7 miles = 12320 yards</b>			
12,407.3	£ 15.40	11,752.2	£ 16.20	<b>7</b>	<b>£ 15.20</b>	<b>£ 16.80</b>	<b>10.52%</b>
12,602.9	£ 15.60	<b>11,935.5</b>	<b>£ 16.40</b>				
12,798.5	£ 15.80	12,118.8	£ 16.60				
12,994.1	£ 16.00	<b>12,302.1</b>	<b>£ 16.80</b>				
13,189.7	£ 16.20	12,485.4	£ 17.00				
13,385.3	£ 16.40	12,668.7	£ 17.20				
13,580.9	£ 16.60	12,852.0	£ 17.40				
13,776.5	£ 16.80	13,035.3	£ 17.60				
<b>13 972.1</b>	<b>£ 17.00</b>	13,218.6	£ 17.80	<b>8 miles = 14080 yards</b>			
14,167.7	£ 17.20	13,401.9	£ 18.00	<b>8</b>	<b>£ 17.00</b>	<b>£ 18.60</b>	<b>9.41%</b>
14,363.3	£ 17.40	13,585.2	£ 18.20				
14,558.9	£ 17.60	<b>13,768.5</b>	<b>£ 18.40</b>				
14,754.5	£ 17.80	<b>13,951.8</b>	<b>£ 18.60</b>				
14,950.1	£ 18.00	14,135.1	£ 18.80				
15,145.7	£ 18.20	14,318.4	£ 19.00				
15,341.3	£ 18.40	14,501.7	£ 19.20				

# TARIFF ONE COMPARISON; PROPOSED FARES against CURRENT FARES

CURRENT FARE TARIFF 1 (£1.80 per mile)		PROPOSED FARE TARIFF 1 (£1.92 per mile)		DISTANCE TRAVELLED in WHOLE MILES	CURRENT FARE at THIS DISTANCE	PROPOSED FARE at THIS DISTANCE	PERCENT INCREASE of PROPOSED FARE
Distance in Yards	Fare at This Distance	Distance in Yards	Fare at This Distance				
15,536.9	£ 18.60	14,685.0	£ 19.40				
<b>15,732.5</b>	<b>£ 18.80</b>	14,868.3	£ 19.60				
15,928.1	£ 19.00	15,051.6	£ 19.80	<b>9 miles = 15840 yards</b>			
16,123.7	£ 19.20	15,234.9	£ 20.00	<b>9</b>	<b>£ 18.80</b>	<b>£ 20.60</b>	<b>9.57%</b>
16,319.3	£ 19.40	<b>15,418.2</b>	<b>£ 20.20</b>				
16,514.9	£ 19.60	15,601.5	£ 20.40				
16,710.5	£ 19.80	<b>15,784.8</b>	<b>£ 20.60</b>				
16,906.1	£ 20.00	15,968.1	£ 20.80				
17,101.7	£ 20.20	16,151.4	£ 21.00				
17,297.3	£ 20.40	16,334.7	£ 21.20				
<b>17,492.9</b>	<b>£ 20.60</b>	16,518.0	£ 21.40				
17,688.5	£ 20.80	16,701.3	£ 21.60				
17,884.1	£ 21.00	16,884.6	£ 21.80	<b>10 miles = 17600 yards</b>			
		17,067.9	£ 22.00	<b>10</b>	<b>£ 20.60</b>	<b>£ 22.40</b>	<b>8.74%</b>
		<b>17,251.2</b>	<b>£ 22.20</b>				
		<b>17,434.5</b>	<b>£ 22.40</b>				
		17,617.8	£ 22.60				

# TARIFF ONE COMPARISON; PROPOSED FARES against CURRENT FARES

CURRENT FARE TARIFF 1 (£1.80 per mile)		PROPOSED FARE TARIFF 1 (£1.92 per mile)		DISTANCE TRAVELLED in WHOLE MILES	CURRENT FARE at THIS DISTANCE	PROPOSED FARE at THIS DISTANCE	PERCENT INCREASE of PROPOSED FARE
Distance in Yards	Fare at This Distance	Distance in Yards	Fare at This Distance				
				1 Mile	£ 4.40	£ 5.20	
				2 Miles	£ 6.20	£ 7.20	
				3 Miles	£ 8.00	£ 9.00	
				4 Miles	£ 9.80	£ 11.00	
				5 Miles	£ 11.60	£ 12.80	
				6 Miles	£ 13.40	£ 14.80	
				7 Miles	£ 15.20	£ 16.80	
				8 Miles	£ 17.00	£ 18.60	
				9 Miles	£ 18.80	£ 20.60	
				10 Miles	£ 20.60	£ 22.40	
PERCENTAGE INCREASE OF AGGREGATE PROPOSED FARES FROM 1 TO 10 MILES				=	£125.00	£138.40	10.72%



# TARIFF TWO COMPARISON; PROPOSED FARES against CURRENT FARES

<b>NIGHT RATE</b> <u>Sunday to Thursday</u> <u>From 23.00hrs to 04.00hrs</u> & <b>EVERY SUNDAY</b> <u>&amp; All Bank Holidays</u> <u>Except Boxing Day</u> <u>From 04.00hrs to 23.00hrs</u>		<b>NIGHT RATE</b> <u>Sunday to Thursday</u> <u>From 23.00hrs to 04.00hrs</u> & <b>EVERY SUNDAY</b> <u>&amp; All Bank Holidays</u> <u>Except Boxing Day</u> <u>From 04.00hrs to 23.00hrs</u>		<b>COMPARISON:</b>  <b>CURRENT and PROPOSED FARES</b>  at  <b>DISTANCES in WHOLE MILES</b>			
<b>CURRENT FARE</b> <b>TARIFF 2 (+13.3%)</b> <b>(£2.04 per mile)</b>		<b>PROPOSED FARE</b> <b>TARIFF 2 (+6.25%)</b> <b>(£2.04 per mile)</b>		DISTANCE TRAVELLED in WHOLE MILES	CURRENT FARE at THIS DISTANCE	PROPOSED FARE at THIS DISTANCE	PERCENT INCREASE of PROPOSED FARE
Distance in Yards	Fare at This Distance	Distance in Yards	Fare at This Distance				
<b>Flag; 0</b>	<b>£ 2.40</b>	<b>Flag; 0</b>	<b>£ 2.60</b>				
<b>195.6</b>	<b>£ 2.60</b>	<b>195.6</b>	<b>£ 2.90</b>				
<b>293.4</b>	<b>£ 2.80</b>	<b>293.4</b>	<b>£ 3.20</b>				
<b>391.2</b>	<b>£ 3.00</b>	<b>391.2</b>	<b>£ 3.50</b>				
<b>489.0</b>	<b>£ 3.20</b>	<b>489.0</b>	<b>£ 3.80</b>				
<b>586.8</b>	<b>£ 3.40</b>	<b>586.8</b>	<b>£ 4.00</b>				
<b>684.6</b>	<b>£ 3.60</b>	<b>759.3</b>	<b>£ 4.20</b>				
857.1	£ 3.80	<b>931.8</b>	<b>£ 4.40</b>				
1029.6	£ 4.00	1104.3	£ 4.60				
1202.1	£ 4.20	1276.8	£ 4.80				
1374.6	£ 4.40	1449.3	£ 5.00				
1547.1	£ 4.60	1621.8	£ 5.20	<b>1 mile = 1760 yards</b>			
<b>1719.6</b>	<b>£ 4.80</b>	<b>1794.3</b>	<b>£ 5.40</b>	<b>1</b>	<b>£ 4.80</b>	<b>£ 5.20</b>	<b>8.33%</b>
1892.1	£ 5.00	1966.8	£ 5.60				
2064.6	£ 5.20	2139.3	£ 5.80				
2237.1	£ 5.40	2311.8	£ 6.00				
2409.6	£ 5.60	2484.3	£ 6.20				
2582.1	£ 5.80	2656.8	£ 6.40				
2754.6	£ 6.00	2829.3	£ 6.60				
2927.1	£ 6.20	3001.8	£ 6.80				
3099.6	£ 6.40	3174.3	£ 7.00				
3272.1	£ 6.60	3346.8	£ 7.20	<b>2 mile = 3520 yards</b>			
<b>3444.6</b>	<b>£ 6.80</b>	<b>3519.3</b>	<b>£ 7.40</b>	<b>2</b>	<b>£ 6.80</b>	<b>£ 7.40</b>	<b>8.82%</b>
3617.1	£ 7.00	<b>3691.8</b>	<b>£ 7.60</b>				
3789.6	£ 7.20	3864.3	£ 7.80				
3962.1	£ 7.40	4036.8	£ 8.00				
4134.6	£ 7.60	4209.3	£ 8.20				
4307.1	£ 7.80	4381.8	£ 8.40				
4479.6	£ 8.00	4554.3	£ 8.60				
4652.1	£ 8.20	4726.8	£ 8.80				
4824.6	£ 8.40	4899.3	£ 9.00				
4997.1	£ 8.60	5071.3	£ 9.20	<b>3 mile = 5280 yards</b>			
<b>5169.6</b>	<b>£ 8.80</b>	<b>5244.3</b>	<b>£ 9.40</b>	<b>3</b>	<b>£ 8.80</b>	<b>£ 9.40</b>	<b>6.82%</b>
5342.1	£ 9.00	<b>5589.3</b>	<b>£ 9.60</b>				
5514.6	£ 9.20	<b>5761.8</b>	<b>£ 9.80</b>				
5687.1	£ 9.40	<b>5934.3</b>	<b>£ 10.00</b>				
5859.6	£ 9.60	6106.8	£ 10.20				

# TARIFF TWO COMPARISON; PROPOSED FARES against CURRENT FARES

CURRENT FARE TARIFF 2 (+13.3%) (£2.04 per mile)		PROPOSED FARE TARIFF 2 (+6.25%) (£2.04 per mile)		DISTANCE TRAVELLED in WHOLE MILES	CURRENT FARE at THIS DISTANCE	PROPOSED FARE at THIS DISTANCE	PERCENT INCREASE of PROPOSED FARE
Distance in Yards	Fare at This Distance	Distance in Yards	Fare at This Distance				
6032.1	£ 9.80	6106.8	£ 10.40				
6204.6	£ 10.00	6279.3	£ 10.60				
6377.1	£ 10.20	6451.8	£ 10.80				
6549.6	£ 10.40	6624.3	£ 11.00				
6722.1	£ 10.60	6796.8	£ 11.20				
<b>6894.6</b>	<b>£ 10.80</b>	6969.3	£ 11.40	4 mile = 7040 yards			
7067.1	£ 11.00	7141.8	£ 11.60	4	£ 10.80	£ 11.40	5.55%
7239.6	£ 11.20	<b>7314.3</b>	<b>£ 11.80</b>				
7412.1	£ 11.40	7486.8	£ 12.00				
7584.6	£ 11.60	7659.3	£ 12.20				
7757.1	£ 11.80	7831.8	£ 12.40				
7929.6	£ 12.00	8004.3	£ 12.60				
8102.1	£ 12.20	8176.8	£ 12.80				
8274.6	£ 12.40	8349.3	£ 13.00				
8447.1	£ 12.60	8521.8	£ 13.20				
8619.6	£ 12.80	8694.3	£ 13.40	5 mile = 8800 yards			
<b>8792.1</b>	<b>£ 13.00</b>	8866.8	£ 13.60	5	£ 13.00	£ 13.40	3.08%
8964.6	£ 13.20	<b>9039.3</b>	<b>£ 13.80</b>				
9137.1	£ 13.40	9211.8	£ 14.00				
9309.6	£ 13.60	9384.3	£ 14.20				
9482.1	£ 13.80	9556.8	£ 14.40				
9654.6	£ 14.00	9729.3	£ 14.60				
9827.1	£ 14.20	9901.8	£ 14.80				
9999.6	£ 14.40	10074.3	£ 15.00				
10172.1	£ 14.60	10246.8	£ 15.20				
10344.6	£ 14.80	10419.3	£ 15.40				
<b>10517.1</b>	<b>£ 15.00</b>	10591.8	£ 15.60	6 mile = 10560 yards			
10689.6	£ 15.20	10764.3	£ 15.80	6	£ 15.00	£ 15.40	2.67%
10862.1	£ 15.40	<b>10936.8</b>	<b>£ 16.00</b>				
11034.6	£ 15.60	11109.3	£ 16.20				
11207.1	£ 15.80	11281.8	£ 16.40				
11379.6	£ 16.00	11454.3	£ 16.60				
11552.1	£ 16.20	11626.8	£ 16.80				
11724.6	£ 16.40	11799.3	£ 17.00				
11897.1	£ 16.60	11971.8	£ 17.20				
12069.6	£ 16.80	12144.3	£ 17.40				
<b>12242.1</b>	<b>£ 17.00</b>	12316.8	£ 17.60	7 mile = 12320 yards			
12414.6	£ 17.20	12489.3	£ 17.80	7	£ 17.00	£ 17.60	3.53%
12587.1	£ 17.40	<b>12661.8</b>	<b>£ 18.00</b>				
12759.6	£ 17.60	12834.3	£ 18.20				
12932.1	£ 17.80	13006.8	£ 18.40				
13104.6	£ 18.00	13179.3	£ 18.60				
13277.1	£ 18.20	13351.8	£ 18.80				
13449.6	£ 18.40	13524.3	£ 19.00				
13622.1	£ 18.60	13696.8	£ 19.20				



## TARIFF TWO COMPARISON; PROPOSED FARES against CURRENT FARES

<b>CURRENT FARE TARIFF 2 (+13.3%) (£2.04 per mile)</b>		<b><i>PROPOSED FARE TARIFF 2 (+6.25%) (£2.04 per mile)</i></b>		DISTANCE TRAVELLED in WHOLE MILES	CURRENT FARE at THIS DISTANCE	PROPOSED FARE at THIS DISTANCE	PERCENT INCREASE of PROPOSED FARE
Distance in Yards	Fare at This Distance	Distance in Yards	Fare at This Distance				
13794.6	£ 18.80	13869.3	£ 19.40				
<b>13967.1</b>	<b>£ 19.00</b>	14041.8	£ 19.60				
14139.6	£ 19.20	14214.3	£ 19.80	<b>8 mile = 14080 yards</b>			
14312.1	£ 19.40	14386.8	£ 20.00	8	£ 19.00	£ 19.60	3.16%
14484.6	£ 19.60	<b>14559.3</b>	<b>£ 20.20</b>				
14657.1	£ 19.80	14731.8	£ 20.40				
14829.6	£ 20.00	14904.3	£ 20.60				
15002.1	£ 20.20	15076.8	£ 20.80				
15174.6	£ 20.40	15249.3	£ 21.00				
15347.1	£ 20.60	15421.8	£ 21.20				
15519.6	£ 20.80	15594.3	£ 21.40				
<b>15692.1</b>	<b>£ 21.00</b>	15766.8	£ 21.60	<b>9 mile = 15840 yards</b>			
15864.6	£ 21.20	15939.3	£ 21.80	9	£ 21.00	£ 21.60	2.86%
16037.1	£ 21.40	16111.8	£ 22.00				
16209.6	£ 21.60	<b>16284.3</b>	<b>£ 22.20</b>				
16382.1	£ 21.80	16456.8	£ 22.40				
16554.6	£ 22.00	16629.3	£ 22.60				
16727.1	£ 22.20	16801.8	£ 22.80				
16899.6	£ 22.40	16974.3	£ 23.00				
17072.1	£ 22.60	17146.8	£ 23.20				
17244.6	£ 22.80	17319.3	£ 23.40				
17417.1	£ 23.00	17491.8	£ 23.60	<b>10 mile = 17600 yards</b>			
<b>17589.6</b>	<b>£ 23.20</b>	17664.3	£ 23.80	10	£ 23.20	£ 23.60	1.72%
17762.1	£ 23.40	17836.8	£ 24.00				
17934.6	£ 23.60	<b>18009.3</b>	<b>£ 24.20</b>				
		18181.8	£ 24.40				
		18354.3	£ 24.60				

## TARIFF TWO COMPARISON; PROPOSED FARES against CURRENT FARES

CURRENT FARE TARIFF 2 (+13.3%) (£2.04 per mile)		PROPOSED FARE TARIFF 2 (+6.25%) (£2.04 per mile)		DISTANCE TRAVELLED in WHOLE MILES	CURRENT FARE at THIS DISTANCE	PROPOSED FARE at THIS DISTANCE	PERCENT INCREASE of PROPOSED FARE
Distance in Yards	Fare at This Distance	Distance in Yards	Fare at This Distance				
				1 Mile	£ 4.80	£ 5.20	
				2 Miles	£ 6.80	£ 7.40	
				3 Miles	£ 8.80	£ 9.40	
				4 Miles	£ 10.80	£ 11.40	
				5 Miles	£ 13.00	£ 13.40	
				6 Miles	£ 15.00	£ 15.40	
				7 Miles	£ 17.00	£ 17.60	
				8 Miles	£ 19.00	£ 19.60	
				9 Miles	£ 21.00	£ 21.60	
				10 Miles	£ 23.20	£ 23.60	
PERCENTAGE INCREASE OF AGGREGATE PROPOSED FARES FROM 1 TO 10 MILES				=	£139.40	£144.60	3.73%



# TARIFF THREE COMPARISON; PROPOSED FARES against CURRENT FARES

<b>NIGHT RATE</b> <b>Friday and Saturday</b> <b>From 23.00hrs to 07.00hrs</b> <b>AND Boxing Day</b> <b>From 00.00hrs to 24.00hrs</b> <b>AND Christmas Eve</b> <b>AND New Year's Eve</b> <b>From 19.00hrs to 24.00hrs</b>		<b>NIGHT RATE</b> <b>Friday and Saturday From</b> <b>23.00hrs to 07.00hrs AND</b> <b>Boxing Day</b> <b>From 00.00hrs to 24.00hrs</b> <b>AND Christmas Eve AND</b> <b>New Year's Eve From</b> <b>19.00hrs to 24.00hrs</b>		<b>COMPARISON:</b>  <b>CURRENT and PROPOSED FARES</b>  <b>at</b>  <b>DISTANCES in WHOLE MILES</b>			
<b>CURRENT FARE</b> <b>TARIFF 3 (+22.8%)</b> <b>(£2.21 per mile)</b>		<b>PROPOSED FARE</b> <b>TARIFF 3 (+15.1%)</b> <b>(£2.21 per mile)</b>		DISTANCE TRAVELLED in WHOLE MILES	CURRENT FARE at THIS DISTANCE	PROPOSED FARE at THIS DISTANCE	PERCENT INCREASE of PROPOSED FARE
Distance in Yards	Fare at This Distance	Distance in Yards	Fare at This Distance				
Flag: 0	£ 2.60	Flag: 0	£ 2.60				
180.5	£ 2.80	180.5	£ 2.90				
270.8	£ 3.00	270.8	£ 3.20				
361.1	£ 3.20	361.1	£ 3.50				
451.4	£ 3.40	451.4	£ 3.80				
541.7	£ 3.60	541.7	£ 4.00				
632.0	£ 3.80	701.0	£ 4.20				
791.3	£ 4.00	860.3	£ 4.40				
950.6	£ 4.20	1019.6	£ 4.60				
1109.9	£ 4.40	1178.9	£ 4.80				
1269.2	£ 4.60	1338.2	£ 5.00				
1428.5	£ 4.80	1497.5	£ 5.20	1 mile = 1760 yards			
1587.8	£ 5.00	1656.8	£ 5.40	1	£ 5.20	£ 5.40	3.85%
1747.1	£ 5.20	1816.1	£ 5.60				
1906.4	£ 5.40	1975.4	£ 5.80				
2065.7	£ 5.60	2134.7	£ 6.00				
2225.0	£ 5.80	2294.0	£ 6.20				
2384.3	£ 6.00	2453.3	£ 6.40				
2543.6	£ 6.20	2612.6	£ 6.60				
2702.9	£ 6.40	2771.9	£ 6.80				
2862.2	£ 6.60	2931.2	£ 7.00				
3021.5	£ 6.80	3090.5	£ 7.20				
3180.8	£ 7.00	3249.8	£ 7.40				
3340.1	£ 7.20	3409.1	£ 7.60	2 mile = 3520 yards			
3499.4	£ 7.40	3568.4	£ 7.80	2	£ 7.40	£ 7.60	2.70%
3658.7	£ 7.60	3727.7	£ 8.00				
3818.0	£ 7.80	3887.0	£ 8.20				
3977.3	£ 8.00	4046.3	£ 8.40				
4136.6	£ 8.20	4205.6	£ 8.60				
4295.9	£ 8.40	4364.9	£ 8.80				
4455.2	£ 8.60	4524.2	£ 9.00				
4614.5	£ 8.80	4683.5	£ 9.20				
4773.8	£ 9.00	4842.8	£ 9.40				
4933.1	£ 9.20	5002.1	£ 9.60				
5092.4	£ 9.40	5161.4	£ 9.80	3 mile = 5280 yards			
5251.7	£ 9.60	5320.7	£ 10.00	3	£ 9.60	£ 9.80	2.08%
5411.0	£ 9.80	5480.0	£ 10.20				



# TARIFF THREE COMPARISON; PROPOSED FARES against CURRENT FARES

CURRENT FARE TARIFF 3 (+22.8%) (£2.21 per mile)		PROPOSED FARE TARIFF 3 (+15.1%) (£2.21 per mile)		DISTANCE TRAVELLED in WHOLE MILES	CURRENT FARE at THIS DISTANCE	PROPOSED FARE at THIS DISTANCE	PERCENT INCREASE of PROPOSED FARE
Distance in Yards	Fare at This Distance	Distance in Yards	Fare at This Distance				
5570.3	£ 10.00	5639.3	£ 10.40				
5729.6	£ 10.20	5798.6	£ 10.60				
5888.9	£ 10.40	5957.9	£ 10.80				
6048.2	£ 10.60	6117.2	£ 11.00				
6207.5	£ 10.80	6276.5	£ 11.20				
6366.8	£ 11.00	6435.8	£ 11.40				
6526.1	£ 11.20	6595.1	£ 11.60				
6685.4	£ 11.40	6754.4	£ 11.80				
6844.7	£ 11.60	6913.7	£ 12.00				
<b>7004.0</b>	<b>£ 11.80</b>	7073.0	£ 12.20	4 mile = 7040 yards			
7163.3	£ 12.00	7232.3	£ 12.20	4	£ 11.80	£ 12.00	1.69%
7322.6	£ 12.20	<b>7391.6</b>	<b>£ 12.40</b>				
7481.9	£ 12.40	7550.9	£ 12.80				
7641.2	£ 12.60	7710.2	£ 13.00				
7800.5	£ 12.80	7869.5	£ 13.20				
7959.8	£ 13.00	8028.8	£ 13.40				
8119.1	£ 13.20	8188.1	£ 13.60				
8278.4	£ 13.40	8347.4	£ 13.80				
8437.7	£ 13.60	8506.7	£ 14.00				
8597.0	£ 13.80	8666.0	£ 14.20				
<b>8756.3</b>	<b>£ 14.00</b>	8825.3	£ 14.40	5 mile = 8800 yards			
8915.6	£ 14.20	8984.6	£ 14.60	5	£ 14.00	£ 14.20	1.43%
9074.9	£ 14.40	<b>9143.9</b>	<b>£ 14.80</b>				
9234.2	£ 14.60	9303.2	£ 15.00				
9393.5	£ 14.80	9462.5	£ 15.20				
9552.8	£ 15.00	9621.8	£ 15.40				
9712.1	£ 15.20	9781.1	£ 15.60				
9871.4	£ 15.40	9940.4	£ 15.80				
10030.7	£ 15.60	10099.7	£ 16.00				
10190.0	£ 15.80	10259.0	£ 16.20				
10349.3	£ 16.00	10418.3	£ 16.40				
<b>10508.6</b>	<b>£ 16.20</b>	10577.6	£ 16.60	6 mile = 10560 yards			
10667.9	£ 16.40	10736.9	£ 16.80	6	£ 16.20	£ 16.40	1.23%
10827.2	£ 16.60	<b>10896.2</b>	<b>£ 17.00</b>				
10986.5	£ 16.80	11055.5	£ 17.20				
11145.8	£ 17.00	11214.8	£ 17.40				
11305.1	£ 17.20	11374.1	£ 17.60				
11464.4	£ 17.40	11533.4	£ 17.80				
11623.7	£ 17.60	11692.7	£ 18.00				
11783.0	£ 17.80	11852.0	£ 18.20				
11942.3	£ 18.00	12011.3	£ 18.40				
12101.6	£ 18.20	12170.6	£ 18.60				
<b>12260.9</b>	<b>£ 18.40</b>	12329.9	£ 18.80	7 mile = 12320 yards			
12420.2	£ 18.60	12489.2	£ 19.00	7	£ 18.40	£ 18.60	1.09%
12579.5	£ 18.80	12648.5	£ 19.20				
12738.8	£ 19.00	<b>12807.8</b>	<b>£ 19.40</b>				

## TARIFF THREE COMPARISON; PROPOSED FARES against CURRENT FARES

CURRENT FARE TARIFF 3 (+22.8%) (£2.21 per mile)		PROPOSED FARE TARIFF 3 (+15.1%) (£2.21 per mile)		DISTANCE TRAVELLED in WHOLE MILES	CURRENT FARE at THIS DISTANCE	PROPOSED FARE at THIS DISTANCE	PERCENT INCREASE of PROPOSED FARE
Distance in Yards	Fare at This Distance	Distance in Yards	Fare at This Distance				
12898.1	£ 19.20	12967.1	£ 19.60				
13057.4	£ 19.40	13126.4	£ 19.80				
13216.7	£ 19.60	13285.7	£ 20.00				
13376.0	£ 19.80	13445.0	£ 20.20				
13535.3	£ 20.00	13604.3	£ 20.40				
13694.6	£ 20.20	13763.6	£ 20.60				
13853.9	£ 20.40	13922.9	£ 20.80				
14013.2	£ 20.60	14082.2	£ 21.00				
14172.5	£ 20.80	14241.5	£ 21.20	8 mile = 14080 yards			
14331.8	£ 21.00	14400.8	£ 21.40	8	£ 20.60	£ 20.80	0.97%
14491.1	£ 21.20	14560.1	£ 21.60				
14650.4	£ 21.40	14719.4	£ 21.80				
14809.7	£ 21.60	14878.7	£ 22.00				
14969.0	£ 21.80	15038.0	£ 22.20				
15128.3	£ 22.00	15197.3	£ 22.40				
15287.6	£ 22.20	15356.6	£ 22.60				
15446.9	£ 22.40	15515.9	£ 22.80				
15606.2	£ 22.60	15675.2	£ 23.00				
15765.5	£ 22.80	15834.5	£ 23.20				
15924.8	£ 23.00	15993.8	£ 23.40				
16084.1	£ 23.20	16153.1	£ 23.60	9 mile = 15840 yards			
16243.4	£ 23.40	16312.4	£ 23.80	9	£ 22.80	£ 23.20	1.75%
16402.7	£ 23.60	16471.7	£ 24.00				
16562.0	£ 23.80	16631.0	£ 24.20				
16721.3	£ 24.00	16790.3	£ 24.40				
16880.6	£ 24.20	16949.6	£ 24.60				
17039.9	£ 24.40	17108.9	£ 24.80				
17199.2	£ 24.60	17268.2	£ 25.00				
17358.5	£ 24.80	17427.5	£ 25.20				
17517.8	£ 25.00	17586.8	£ 25.40				
17677.1	£ 25.20	17746.1	£ 25.60				
17836.4	£ 25.40	17905.4	£ 25.80	10 mile = 17600 yards			
		18064.7	£ 26.00	10	£ 25.00	£ 25.40	1.60%
		18224.0	£ 26.20				
		18383.3	£ 26.40				
		18542.6	£ 26.60				



# TARIFF THREE COMPARISON; PROPOSED FARES against CURRENT FARES

CURRENT FARE TARIFF 3 (+22.8%) (£2.21 per mile)		PROPOSED FARE TARIFF 3 (+15.1%) (£2.21 per mile)		DISTANCE TRAVELLED in WHOLE MILES	CURRENT FARE at THIS DISTANCE	PROPOSED FARE at THIS DISTANCE	PERCENT INCREASE of PROPOSED FARE
Distance in Yards	Fare at This Distance	Distance in Yards	Fare at This Distance				
				1 Mile	£ 5.20	£ 5.40	
				2 Miles	£ 7.40	£ 7.60	
				3 Miles	£ 9.60	£ 9.80	
				4 Miles	£ 11.80	£ 12.00	
				5 Miles	£ 14.00	£ 14.20	
				6 Miles	£ 16.20	£ 16.40	
				7 Miles	£ 18.40	£ 18.60	
				8 Miles	£ 20.60	£ 20.80	
				9 Miles	£ 22.80	£ 23.20	
				10 Miles	£ 25.00	£ 25.40	
PERCENTAGE INCREASE OF AGGREGATE PROPOSED FARES FROM 1 TO 10 MILES				=	£151.00	£153.40	1.59%

# NO CHANGE TARIFF 4 CURRENT FARES

<b>CHRISTMAS DAY &amp; NEW YEAR'S DAY</b> <u>Christmas Day;</u> <u>From</u> <u>00.00hrs to 24.00hrs</u> <u>New Year's Day;</u> <u>From</u> <u>00.00hrs to 06.00hrs</u>		<b>CHRISTMAS DAY &amp; NEW YEAR'S DAY</b> <u>Christmas Day;</u> <u>From</u> <u>00.00hrs to 24.00hrs</u> <u>New Year's Day;</u> <u>From</u> <u>00.00hrs to 06.00hrs</u>		<b>NO CHANGE</b>  <b>TARIFF 4 CURRENT FARES</b>  <b>at</b>  <b>DISTANCES in WHOLE MILES</b>			
<b>CURRENT FARE TARIFF 4 (+51.1%)</b> <b>£2.72 per mile</b>		<b>NO CHANGE TARIFF 4</b>		<b>DISTANCE TRAVELLED</b> <b>in</b> <b>WHOLE MILES</b>	<b>CURRENT FARE</b> <b>at</b> <b>THIS DISTANCE</b>	<b>NO CHANGE FARE</b> <b>at</b> <b>THIS DISTANCE</b>	
Distance in Yards	Fare at This Distance	Distance in Yards	Fare at This Distance				
<b>Flag: 0</b>	<b>£ 3.00</b>		<b>£</b>				
<b>220.0</b>	<b>£ 3.30</b>		<b>£</b>				
<b>330.0</b>	<b>£ 3.60</b>		<b>£</b>				
<b>440.0</b>	<b>£ 3.90</b>		<b>£</b>				
<b>550.0</b>	<b>£ 4.20</b>		<b>£</b>				
<b>660.0</b>	<b>£ 4.50</b>		<b>£</b>				
<b>770.0</b>	<b>£ 4.80</b>		<b>£</b>				
964.1	£ 5.10		£				
1158.2	£ 5.40		£				
1352.3	£ 5.70		£				
1546.4	£ 6.00		£				
<b>1740.5</b>	<b>£ 6.30</b>		<b>£</b>				
1934.6	£ 6.60		£				
2128.7	£ 6.90		£				
2322.8	£ 7.20		£				
2516.9	£ 7.50		£				
2711.0	£ 7.80		£				
2905.1	£ 8.10		£				
3099.2	£ 8.40		£				
3293.3	£ 8.70		£				
<b>3487.4</b>	<b>£ 9.00</b>		<b>£</b>				
3681.5	£ 9.30		£				
3875.6	£ 9.60		£				
4069.7	£ 9.90		£				
4263.8	£ 10.20		£				
4457.9	£ 10.50		£				
4652.0	£ 10.80		£				
4846.1	£ 11.10		£				
5040.2	£ 11.40		£				
<b>5234.3</b>	<b>£ 11.70</b>		<b>£</b>				
5428.4	£ 12.00		£				
5622.5	£ 12.30		£				
5816.6	£ 12.60		£				
6010.7	£ 12.90		£				
6204.8	£ 13.20		£				



# NO CHANGE TARIFF 4 CURRENT FARES

CURRENT FARE TARIFF 4 (+51.1%) £2.72 per mile				DISTANCE TRAVELLED in WHOLE MILES	CURRENT FARE at THIS DISTANCE		
Distance in Yards	Fare at This Distance	Distance in Yards	Fare at This Distance				
6398.9	£ 13.50		£				
6593.0	£ 13.80		£				
6787.1	£ 14.10		£				
<b>6981.2</b>	<b>£ 14.40</b>		£	<b>4 mile = 7040 yards</b>			
7175.3	£ 14.70		£	4	£ 14.40		
7369.4	£ 15.00		£				
7563.5	£ 15.30		£				
7757.6	£ 15.60		£				
7951.7	£ 15.90		£				
8145.8	£ 16.20		£				
8339.9	£ 16.50		£				
8534.0	£ 16.80		£				
<b>8728.1</b>	<b>£ 17.10</b>		£	<b>5 mile = 8800 yards</b>			
8922.2	£ 17.40		£	5	£ 17.10		
9116.3	£ 17.70		£				
9310.4	£ 18.00		£				
9504.5	£ 18.30		£				
9698.6	£ 18.60		£				
9892.7	£ 18.90		£				
10086.8	£ 19.20		£				
10280.9	£ 19.50		£				
<b>10475.0</b>	<b>£ 19.80</b>		£	<b>6 mile = 10560 yards</b>			
10669.1	£ 20.10		£	6	£ 19.80		
10863.2	£ 20.40		£				
11057.3	£ 20.70		£				
11251.4	£ 21.00		£				
11445.5	£ 21.30		£				
11639.6	£ 21.60		£				
11833.7	£ 21.90		£				
12027.8	£ 22.20		£				
<b>12221.9</b>	<b>£ 22.50</b>		£	<b>7 mile = 12320 yards</b>			
12416.0	£ 22.80		£	7	£ 22.50		
12610.1	£ 23.10		£				
12804.2	£ 23.40		£				
12998.3	£ 23.70		£				
13192.4	£ 24.00		£				
13386.5	£ 24.30		£				
13580.6	£ 24.60		£				
13774.7	£ 24.90		£				
<b>13968.8</b>	<b>£ 25.20</b>		£	<b>8 mile = 14080 yards</b>			
14162.9	£ 25.50		£	8	£ 25.20		
14357.0	£ 25.80		£				
14551.1	£ 26.10		£				
14745.2	£ 26.40		£				



## TARIFF FOUR COMPARISON; PROPOSED FARE against CURRENT FARES

[illegible]

# NO CHANGE TARIFF 4 CURRENT FARES

CURRENT FARE TARIFF 4 (+51.1%) £2.72 per mile				DISTANCE TRAVELLED in WHOLE MILES	CURRENT FARE at THIS DISTANCE		
Distance in Yards	Fare at This Distance	Distance in Yards	Fare at This Distance				
				1 Mile	£ 6.30		
				2 Miles	£ 9.00		
				3 Miles	£ 11.70		
				4 Miles	£ 14.40		
				5 Miles	£ 17.10		
				6 Miles	£ 19.80		
				7 Miles	£ 22.50		
				8 Miles	£ 25.20		
				9 Miles	£ 27.90		
				10 Miles	£ 30.60		
PERCENTAGE INCREASE OF AGGREGATE PROPOSED FARES FROM 1 TO 10 MILES				=	£184.50		

# TIME CHANGES FOR CURRENT TARIFF ONE ONLY

CURRENT TARIFFS	UNIT PRICE CHARGE	TIME IN SECONDS PER UNIT	EQUIVALENT HOURLY RATE
CURRENT TARIFF ONE; <b>INCREASE</b> DAY RATE; (Monday to Saturday from 07.00hrs to 23.00hrs excluding those days & times as in Tariffs Two, Three and Four)	20 pence 30 pence	42.8 secs 64.2 secs	£16.80
TARIFF TWO; <b>NO CHANGE</b> NIGHT RATE; (Sunday to Thursday from 23.00hrs to 04.00hrs AND Every Sunday & All Bank Holidays except Boxing Day from 07.00hrs to 23.00hrs)	20 pence 30 pence	40.0 secs 60.0 secs	£18.00
TARIFF THREE; <b>NO CHANGE</b> NIGHT RATE; (Friday and Saturday from 23.00hrs to 07.00hrs AND Boxing Day from 00.01hrs to 24.00hrs AND Christmas Eve & New Year's Eve from 19.00hrs to 24.00hrs)	20 pence 30 pence	36.9 secs 55.3 secs	£19.50
TARIFF FOUR; <b>NO CHANGE</b> CHRISTMAS and NEW YEAR RATE (Christmas Day from 00.01hrs to 24.00hrs AND New Year's Day from 00.01hrs to 07.00hrs)	30 pence	45.0 secs	£24.00

## Information in Support of a Variation in the Hackney Carriage Table of Fares

1. The Hackney Carriage trade respectfully ask Birmingham City Council Licensing Committee for a variation in the Hackney Carriage Table of Fares.
2. The last increase in the Hackney Carriage Table of Fares was February 2012 and was implemented in **June 2012**.
3. It is now **10** years since the Hackney Carriage trade applied for an increase in the Table of Fares.
4. This application for a variation in the Hackney Carriage Table of Fares is for an increase in Initial Charges on **Tariffs One, Two, Three & Four** and an increase in Distance Charges on **Tariff One & Tariff Four**.
5. There is a proposal for an increase in the Initial Charge (**The Flag Drop**) for Tariff One from **£2.20** to **£3.20**, an increase of **£1.00**.
6. On Tariff One the proposed variation in Distance Charges equates to an average percentage increase in the aggregate proposed fares at one mile distances for the first ten miles of **13%**. This represents a proposed increase of **1.23%** per annum for the last 10 years since the last application for a variation in the Table of Fares in **February 2012**.
7. The proposed variation in Waiting Time Charges on Tariff One is an increase of **£1.10** pence per hour which equates to a percentage increase of **7%**. This represents a proposed increase of **0.7%** per annum for the last **10** years since the last application for a variation in the Table of Fares in **February 2012**.
8. There is a proposal to change the operational **end time** of Tariff One from **23:00hrs** to **22:00hrs**. Current **end time** for Tariff One is **23:00hrs**.
9. There is a proposal for an increase in the Initial Charge (**The Flag Drop**) for Tariff Two from **£2.40** to **£3.20**, an increase of **£0.80p**.
10. The Hackney Carriage trade are not seeking an increase in Distance Charges or Waiting Time Charges on Tariff Two.
11. There is a proposal to change the operational **start time** of Tariff Two from **23:00hrs** to **22:00hrs**. Current **start time** for Tariff Two is **23:00hrs**.
12. There is a proposal for an increase in the Initial Charge (**The Flag Drop**) for Tariff Three from **£2.60** to **£3.20**, an increase of **£0.60p**.
13. The Hackney Carriage trade are not seeking an increase in Distance Charges or Waiting Time Charges on Tariff Three.
14. There is a proposal to change the operational **start time** of Tariff Three from **23:00hrs** to **22:00hrs**. Current **start time** for Tariff Three is **23:00hrs**. On Christmas Eve and on New Years Eve we propose the start time of Tariff Three change from **19.00hrs** to **18.00hrs**. The current **start time** of Tariff Three on Christmas Eve and New Years Eve is **19.00hrs**.



**15.** There is a proposal for an increase in the Initial Charge (The Flag Drop) for Tariff Four from **£3.00** to **£4.20**, an increase of **£1.20p**.

**16.** On Tariff Four the proposed variation in Distance Charges equates to an average percentage increase in the aggregate proposed fares at one mile distances for the first ten miles of **14%**. This represents a proposed increase of **1.31%** per annum for the last 10 years since the last application for a variation in the Table of Fares in **February 2012**. The Hackney Carriage trade are not seeking an increase in **Distance Charges** or **Waiting Time Charges** on Tariff Four.

**17.** The Hackney Carriage trade is not seeking an increase in the Soilage Charge on any of the tariffs.

**18.** The existing Table of Fares mandates that night tariffs finish at **04.00hrs** on weekday mornings and at **07.00hrs** on Saturday and Sunday mornings. The Hackney Carriage trade is not seeking any changes.

**19.** The percentage changes in the Consumer Price Index [All Items] over 12 Month periods from February 2012 (the date of the last application for a variation in the Table of Fares) to February 2021 are provided by the ONS website, for example:

- February 2012 to February 2013; **+ 2.4%**
- February 2013 to February 2014; **+ 1.4%**
- February 2014 to February 2015; **+ 0.0%**
- February 2020 to February 2021; **+ 3.4%**

This information is from the Office for National Statistics website.

This represents a total percentage increase of **17.00%** in the Consumer Price Index for the **10 year** period from **February 2012** (the date of the last application for a variation in the Table of Fares) to **February 2021**

**Source;**

**<https://www.ons.gov.uk/economy/inflationandpriceindices/timeseries/ead6/mm23>**

**20.** The percentage changes in the Retail Prices Index [**All Items**] over **12 Month** periods from **February 2012** (the date of the last application for a variation in the Table of Fares) to **February 2021** are provided by the ONS website, for example:

- February 2012 to February 2013; **+ 3.0 %**
- February 2013 to February 2014; **+ 2.4 %**
- February 2014 to February 2015; **+ 1.0 %**
- February 2020 to February 2021; **+ 4.1 %**

This information is from the Office for National Statistics website.

This represents a total percentage increase of **25.8%** in the Retail Price Index for the **10 year** period from **February 2012** (the date of the last application for a variation in the Table of Fares) to **February 2021**.



Source;

<https://www.ons.gov.uk/economy/inflationandpriceindices/timeseries/czeq/mm23>

**21.** The Hackney Carriage trade is seeking an increase in Extra Charges on all of the tariffs for the carriage of domestic pets outside of suitable pet carriers, bulky items such as domestic & office furniture, domestic & commercial appliances, bicycles, boxed items with a total volume equal to or in excess of **0.5** cubic metres.

- **£5.00** is justified for carriage of pets for cleaning the vehicle afterwards.

- **£15.00** is justified for carriage of bulky items such as washing machines, televisions, Mattresses, etc. The list is not exhaustive and refers to situations where a 'man-with-a-van' or an actual removal company would be most appropriate.

**22.** Since the last application for an increase in the Table of Fares, living costs have escalated noticeably and household bills continue to increase.

**23.** Hackney Carriage proprietors can no longer continue to absorb these relentless increases in operating costs and overheads and drivers also need to balance their household budgets.

**24.** The Hackney Carriage trade therefore respectfully ask that the Licensing Committee approve the proposed increase in the Table of Fares, not only to enable Hackney Carriage proprietors to arrest their spiralling operating costs and thereby continue to maintain their vehicles to the high standards required for the travelling public's safety, but also to help all drivers in the trade to try to preserve a minimum standard of living.

**25.** The Hackney Carriage trade would like to highlight the importance of an increase in tariff for Hackneys to continue as a viable form of employment in view of the fact that Hackney numbers have now dropped to an alarming low of **627**.

# SUMMARY of PROPOSED VARIATIONS in the HACKNEY CARRIAGE TABLE of FARES

	TARIFF ONE	TARIFF TWO	TARIFF THREE	TARIFF FOUR
<b>INITIAL CHARGE - FLAG DROP;</b> Current Flag Drop: <b>PROPOSED FLAG DROP:</b> <b>C H A N G E S</b>	£2.20 £3.20 £1 INCREASE	£2.40 £3.20 80p INCREASE	£2.60 £3.20 60p INCREASE	£3.00 £4.20 £1.20 INCREASE
<b>FIRST MILE;</b> Current First Mile Charge: <b>PROPOSED FIRST MILE CHARGE:</b> <b>C H A N G E S</b> (First Mile)	£4.40 £5.40 £1 INCREASE	£4.80 £5.60 80p INCREASE	£5.20 £5.80 60p INCREASE	£6.30 £7.50 £1.20 INCREASE
<b>MILEAGE CHARGE</b> (Thereafter); Current Mileage Charge: <b>PROPOSED MILEAGE CHARGE:</b> <b>C H A N G E S</b> (per Mile)	£1.80 £1.92 12p INCREASE	£2.04 £2.04 NO CHANGE	£2.21 £2.21 NO CHANGE	£2.72 £3.00 28p INCREASE
<b>WAITING &amp; TIME CHARGES;</b> Current Time Charges per Hour: <b>PROPOSED TIME CHARGES per HOUR:</b> <b>C H A N G E S</b> (per Hour)	£15.72 £16.82 £1.10 INCREASE	£18.00 £18.00 NO CHANGE	£19.50 £19.50 NO CHANGE	£24.00 £24.00 NO CHANGE
<b>SOILAGE CHARGES;</b> Current Soilage Charges: <b>PROPOSED SOILAGE CHARGES:</b>	£40.00 £40.00 NO CHANGE	£40.00 £40.00 NO CHANGE	£40.00 £40.00 NO CHANGE	£60.00 £60.00 NO CHANGE
<b>EXTRA CHARGES;</b>	YES	YES	YES	YES

## BIRMINGHAM CITY COUNCIL HACKNEY CARRIAGE - TABLE of FARES

**It is a criminal offence TO NOT PAY THE TAXI FARE, which is covered by The Theft Act 1968, The Theft Act 1978 and The Fraud Act 2006.**

The taximeter is programmed to select the correct tariff automatically, from the tariffs as detailed below, depending on the date, day and time of day that the Hackney Carriage is being hired using real time clock tariff changes in hired mode.

<b>TARIFF ONE: STANDARD DAY RATE</b> Applicable Monday to Friday From 04.00hrs to 22.00hrs AND on Saturday - From 07.00hrs to 22.00hrs (EXCEPT for those days and times as specified in Tariffs Two, Three and Four)	<b>TARIFF TWO: WEEKDAY NIGHT RATE</b> Applicable Sunday to Thursday - From 22.00hrs to 04.00hrs the next day AND on Sunday - From 07.00hrs to 22.00hrs AND All Bank Holidays - From 00.00hrs to 22.00hrs. (EXCEPT for those days and times as specified in Tariffs Three & Four)
<b>TARIFF THREE: WEEKEND NIGHT RATE</b> Applicable Friday and Saturday - From 22.00hrs to 07.00hrs the next day AND on Boxing Day - From 00.00hrs to 24.00hrs AND on Christmas Eve - From 18.00hrs to 24.00hrs AND on New Year's Eve - From 18.00hrs to 24.00hrs	<b>TARIFF FOUR: CHRISTMAS &amp; NEW YEAR SEASON</b> Applicable on Christmas Day and New Year's Day On Christmas Day - From 00.00hrs to 24.00hrs A N D On New Year's Day - From 00.00hrs to 07.00hrs

The fare is shown on the taximeter, which records on the basis of time or distance at the following rates.

	<b>TARIFF ONE</b>	<b>TARIFF TWO</b>	<b>TARIFF THREE</b>	<b>TARIFF FOUR</b>
<b><u>INITIAL CHARGES:</u></b> A charge of For the first or part thereof	£3.20 187.5 yards	£3.20 195.6 yards	£3.20 180.5 yards	£4.20 220 yards
<b><u>MILEAGE CHARGES:</u></b> A charge of For each subsequent or part thereof until have been travelled.	20p 125.0 yards 1062.5 yards	20p 97.8 yards 684.6 yards	20p 90.3 yards 632 yards	30p 110 yards 770 yards
Thereafter: A charge of For each subsequent or part thereof Equivalent to a rate per mile of	20p 183.3 yards £1.92	20p 172.5 yards £2.04	20p 159.3 yards £2.21	30p 176.0 yards £3.00
<b><u>WAITING &amp; TIME CHARGES:</u></b> A charge of For each or part thereof Equivalent to an hourly rate of	20p 42.8 sec £16.82	20p 40.0 sec £18.00	20p 36.9 sec £19.50	30p 45.0 secs £24.00
<b><u>SOILAGE CHARGES:</u></b> An additional charge may be made in the event of <b>SOILAGE OR FOULING OF THE VEHICLE</b>	<b>£40.00</b>	<b>£40.00</b>	<b>£40.00</b>	<b>£60.00</b>

**EXTRA CHARGES:**

For every person in excess of one	20p
For every article of luggage carried outside the passenger compartment	20p
Carriage of any pets (outside of any pet carriers / containers)	£5.00
Carriage of any Bulky Items / Removals	£15.00
Any road toll or barrier charge incurred in the execution of the hiring	

## COMPLAINTS

**Any complaint of overcharging, or about this taxi or taxi driver, should be sent in writing to the Enforcement Section, Birmingham City Council, Phoenix House, Valepits Road, Garretts Green, Birmingham B33 0TD, or by telephoning 0121 303 9611, quoting the number of the taxi and the number of the driver's badge. Enquiries regarding property accidentally left in a taxi should be made at the nearest West Midlands Police Station.**

# H0000

**JUNE 2022**

# TARIFF ONE COMPARISON; PROPOSED FARES against CURRENT FARES

DAY RATE Monday to Friday 04.00hrs to 23.00hrs AND Saturday 07.00hrs to 23.00hrs		DAY RATE Monday to Friday 04.00hrs to 22.00hrs AND Saturday 07.00hrs to 22.00hrs		COMPARISON: PROPOSED and CURRENT FARES at DISTANCES in WHOLE MILES			
CURRENT FARE TARIFF 1 (£1.80 per mile)		PROPOSED FARE TARIFF 1 (£1.92 per mile)		DISTANCE TRAVELLED in WHOLE MILES	CURRENT FARE at THIS DISTANCE	PROPOSED FARE at THIS DISTANCE	PERCENT INCREASE of PROPOSED FARE
Distance in Yards	Fare at This Distance	Distance in Yards	Fare at This Distance				
<b>Flag; 0</b>	<b>£ 2.20</b>	<b>Flag; 0</b>	<b>£ 3.20</b>				
<b>187.5</b>	<b>£ 2.40</b>	<b>187.5</b>	<b>£ 3.40</b>				
<b>312.5</b>	<b>£ 2.60</b>	<b>312.5</b>	<b>£ 3.60</b>				
<b>437.5</b>	<b>£ 2.80</b>	<b>437.5</b>	<b>£ 3.80</b>				
<b>562.5</b>	<b>£ 3.00</b>	<b>562.5</b>	<b>£ 4.00</b>				
<b>687.5</b>	<b>£ 3.20</b>	<b>687.5</b>	<b>£ 4.20</b>				
<b>812.5</b>	<b>£ 3.40</b>	<b>812.5</b>	<b>£ 4.40</b>				
<b>937.5</b>	<b>£ 3.60</b>	<b>937.5</b>	<b>£ 4.60</b>				
<b>1,062.5</b>	<b>£ 3.80</b>	<b>1,062.5</b>	<b>£ 4.80</b>				
1,258.1	£ 4.00	1,245.8	£ 5.00	1 mile = 1760 yards			
1,453.7	£ 4.20	1,429.1	£ 5.20	1	£ 4.40	£ 5.40	22.73%
<b>1,649.3</b>	<b>£ 4.40</b>	<b>1,612.4</b>	<b>£ 5.40</b>				
1,844.9	£ 4.60	1,795.7	£ 5.60				
2,040.5	£ 4.80	1,979.0	£ 5.80				
2,236.1	£ 5.00	2,162.3	£ 6.00				
2,431.7	£ 5.20	2,345.6	£ 6.20				
2,627.3	£ 5.40	2,528.9	£ 6.40				
2,822.9	£ 5.60	2,712.2	£ 6.60				
3,018.5	£ 5.80	2,895.5	£ 6.80				
3,214.1	£ 6.00	3,078.8	£ 7.00	2 miles = 3520 yards			
<b>3,409.7</b>	<b>£ 6.20</b>	<b>3,262.1</b>	<b>£ 7.20</b>	2	£ 6.20	£ 7.40	19.35%
3,605.3	£ 6.40	<b>3,445.4</b>	<b>£ 7.40</b>				
3,800.9	£ 6.60	3,628.7	£ 7.60				
3,996.5	£ 6.80	3,812.0	£ 7.80				
4,192.1	£ 7.00	3,995.3	£ 8.00				
4,387.7	£ 7.20	4,178.6	£ 8.20				
4,583.3	£ 7.40	4,361.9	£ 8.40				
4,778.9	£ 7.60	4,545.2	£ 8.60				
4,974.5	£ 7.80	4,728.5	£ 8.80	3 miles = 5280 yards			
<b>5,170.1</b>	<b>£ 8.00</b>	<b>4,911.8</b>	<b>£ 9.00</b>	3	£ 8.00	£ 9.40	17.50%
5,365.7	£ 8.20	5,095.1	£ 9.20				
5,561.3	£ 8.40	<b>5,278.4</b>	<b>£ 9.40</b>				
5,756.9	£ 8.60	5,461.7	£ 9.60				
5,952.5	£ 8.80	5,645.0	£ 9.80				
6,148.1	£ 9.00	5,828.3	£ 10.00				
6,343.7	£ 9.20	6,011.6	£ 10.20				
6,539.3	£ 9.40	6,194.9	£ 10.40				
6,734.9	£ 9.60	6,378.2	£ 10.60				



# TARIFF ONE COMPARISON; PROPOSED FARES against CURRENT FARES

CURRENT FARE TARIFF 1 (£1.80 per mile)		PROPOSED FARE TARIFF 1 (£1.92 per mile)		DISTANCE TRAVELLED in WHOLE MILES	CURRENT FARE at THIS DISTANCE	PROPOSED FARE at THIS DISTANCE	PERCENT INCREASE of PROPOSED FARE
Distance in Yards	Fare at This Distance	Distance in Yards	Fare at This Distance				
<b>6 930.5</b>	<b>£ 9.80</b>	6,561.5	£ 10.80	<b>4 miles = 7040 yards</b>			
7,126.1	£ 10.00	<b>6 744.8</b>	<b>£ 11.00</b>	<b>4</b>	<b>£ 9.80</b>	<b>£ 11.20</b>	<b>14.29%</b>
7,321.7	£ 10.20	<b>6,928.1</b>	<b>£ 11.20</b>				
7,517.3	£ 10.40	7,111.4	£ 11.40				
7,712.9	£ 10.60	7,294.7	£ 11.60				
7,908.5	£ 10.80	7,478.0	£ 11.80				
8,104.1	£ 11.00	7,661.3	£ 12.00				
8,299.7	£ 11.20	7,844.6	£ 12.20				
8,495.3	£ 11.40	8,027.9	£ 12.40				
<b>8 690.9</b>	<b>£ 11.60</b>	8,211.2	£ 12.60	<b>5 miles = 8800 yards</b>			
8,886.5	£ 11.80	<b>8,394.5</b>	<b>£ 12.80</b>	<b>5</b>	<b>£ 11.60</b>	<b>£ 13.20</b>	<b>13.79%</b>
9,082.1	£ 12.00	8,577.8	£ 13.00				
9,277.7	£ 12.20	<b>8,761.1</b>	<b>£ 13.20</b>				
9,473.3	£ 12.40	8,944.4	£ 13.40				
9,668.9	£ 12.60	9,127.7	£ 13.60				
9,864.5	£ 12.80	9,311.0	£ 13.80				
10,060.1	£ 13.00	9,494.3	£ 14.00				
10,255.7	£ 13.20	9,677.6	£ 14.20				
<b>10 451.3</b>	<b>£ 13.40</b>	9,860.9	£ 14.40	<b>6 miles = 10560 yards</b>			
10,646.9	£ 13.60	10,044.2	£ 14.60	<b>6</b>	<b>£ 13.40</b>	<b>£ 15.00</b>	<b>11.94%</b>
10,842.5	£ 13.80	<b>10,277.5</b>	<b>£ 14.80</b>				
11,038.1	£ 14.00	<b>10,410.8</b>	<b>£ 15.00</b>				
11,233.7	£ 14.20	10,594.1	£ 15.20				
11,429.3	£ 14.40	10,777.4	£ 15.40				
11,624.9	£ 14.60	10,960.7	£ 15.60				
11,820.5	£ 14.80	11,144.0	£ 15.80				
12,016.1	£ 15.00	11,327.3	£ 16.00				
<b>12 211.7</b>	<b>£ 15.20</b>	11,510.6	£ 16.20	<b>7 miles = 12320 yards</b>			
12,407.3	£ 15.40	11,693.9	£ 16.40	<b>7</b>	<b>£ 15.20</b>	<b>£ 17.00</b>	<b>11.84%</b>
12,602.9	£ 15.60	<b>11,877.2</b>	<b>£ 16.60</b>				
12,798.5	£ 15.80	12,060.5	£ 16.80				
12,994.1	£ 16.00	<b>12,243.8</b>	<b>£ 17.00</b>				
13,189.7	£ 16.20	12,427.1	£ 17.20				
13,385.3	£ 16.40	12,610.4	£ 17.40				
13,580.9	£ 16.60	12,793.7	£ 17.60				
13,776.5	£ 16.80	12,977.0	£ 17.80				
<b>13 972.1</b>	<b>£ 17.00</b>	13,160.3	£ 18.00	<b>8 miles = 14080 yards</b>			
14,167.7	£ 17.20	13,343.6	£ 18.20	<b>8</b>	<b>£ 17.00</b>	<b>£ 19.00</b>	<b>11.76%</b>
14,363.3	£ 17.40	13,526.9	£ 18.40				
14,558.9	£ 17.60	<b>13,710.2</b>	<b>£ 18.60</b>				
14,754.5	£ 17.80	13,893.5	£ 18.80				
14,950.1	£ 18.00	<b>14,076.8</b>	<b>£ 19.00</b>				
15,145.7	£ 18.20	14,260.1	£ 19.20				
15,341.3	£ 18.40	14,443.4	£ 19.40				



# TARIFF ONE COMPARISON; PROPOSED FARES against CURRENT FARES

CURRENT FARE TARIFF 1 (£1.80 per mile)		PROPOSED FARE TARIFF 1 (£1.92 per mile)		DISTANCE TRAVELLED in WHOLE MILES	CURRENT FARE at THIS DISTANCE	PROPOSED FARE at THIS DISTANCE	PERCENT INCREASE of PROPOSED FARE
Distance in Yards	Fare at This Distance	Distance in Yards	Fare at This Distance				
15,536.9	£ 18.60	14,626.7	£ 19.60				
<b>15,732.5</b>	<b>£ 18.80</b>	14,810.0	£ 19.80				
15,928.1	£ 19.00	14,993.3	£ 12.00	<b>9 miles = 15840 yards</b>			
16,123.7	£ 19.20	15,176.6	£ 20.20	<b>9</b>	<b>£ 18.80</b>	<b>£ 20.80</b>	<b>10.64%</b>
16,319.3	£ 19.40	<b>15,359.9</b>	<b>£ 20.40</b>				
16,514.9	£ 19.60	15,543.2	£ 20.60				
16,710.5	£ 19.80	<b>15,726.5</b>	<b>£ 20.80</b>				
16,906.1	£ 20.00	15,909.8	£ 21.00				
17,101.7	£ 20.20	16,093.1	£ 21.20				
17,297.3	£ 20.40	16,276.4	£ 21.40				
<b>17,492.9</b>	<b>£ 20.60</b>	16,459.7	£ 21.60				
17,688.5	£ 20.80	16,643.0	£ 21.80				
17,884.1	£ 21.00	16,826.3	£ 22.00	<b>10 miles = 17600 yards</b>			
		17,009.6	£ 22.20	<b>10</b>	<b>£ 20.60</b>	<b>£ 22.80</b>	<b>10.68%</b>
		<b>17,192.9</b>	<b>£ 22.40</b>				
		17,376.2	£ 22.60				
		<b>17,559.5</b>	<b>£ 22.80</b>				
		17,742.8	£ 23.00				

# TARIFF ONE COMPARISON; PROPOSED FARES against CURRENT FARES

CURRENT FARE TARIFF 1 (£1.80 per mile)		PROPOSED FARE TARIFF 1 (£1.92 per mile)		DISTANCE TRAVELLED in WHOLE MILES	CURRENT FARE at THIS DISTANCE	PROPOSED FARE at THIS DISTANCE	PERCENT INCREASE of PROPOSED FARE
Distance in Yards	Fare at This Distance	Distance in Yards	Fare at This Distance				
				1 Mile	£ 4.40	£ 5.40	
				2 Miles	£ 6.20	£ 7.40	
				3 Miles	£ 8.00	£ 9.40	
				4 Miles	£ 9.80	£ 11.20	
				5 Miles	£ 11.60	£ 13.20	
				6 Miles	£ 13.40	£ 15.00	
				7 Miles	£ 15.20	£ 17.00	
				8 Miles	£ 17.00	£ 19.00	
				9 Miles	£ 18.80	£ 20.80	
				10 Miles	£ 20.60	£ 22.80	
PERCENTAGE INCREASE OF AGGREGATE PROPOSED FARES FROM 1 TO 10 MILES				=	£125.00	£141.20	12.96%

# TARIFF TWO COMPARISON; PROPOSED FARES against CURRENT FARES

<b>NIGHT RATE</b> <b>Sunday to Thursday From</b> <b>23.00hrs to 04.00hrs &amp;</b> <b>EVERY SUNDAY</b> <b>&amp; All Bank Holidays</b> <b>Except Boxing Day From</b> <b>04.00hrs to 23.00hrs</b>		<b>NIGHT RATE</b> <b>Sunday to Thursday</b> <b>From 22.00hrs to 04.00hrs</b> <b>&amp;</b> <b>EVERY SUNDAY</b> <b>&amp; All Bank Holidays</b> <b>Except Boxing Day</b> <b>From 04.00hrs to 22.00hrs</b>		<b>COMPARISON:</b>  <b>CURRENT and PROPOSED FARES</b>  <b>at</b>  <b>DISTANCES in WHOLE MILES</b>			
<b>CURRENT FARE</b> <b>TARIFF 2 (+13.3%)</b> <b>(£2.04 per mile)</b>		<b>PROPOSED FARE</b> <b>TARIFF 2 (+6.25%)</b> <b>(£2.04 per mile)</b>		DISTANCE TRAVELLED in WHOLE MILES	CURRENT FARE at THIS DISTANCE	PROPOSED FARE at THIS DISTANCE	PERCENT INCREASE of PROPOSED FARE
Distance in Yards	Fare at This Distance	Distance in Yards	Fare at This Distance				
<b>Flag; 0</b>	<b>£ 2.40</b>	<b>Flag; 0</b>	<b>£ 3.20</b>				
<b>195.6</b>	<b>£ 2.60</b>	<b>195.6</b>	<b>£ 3.40</b>				
<b>293.4</b>	<b>£ 2.80</b>	<b>293.4</b>	<b>£ 3.60</b>				
<b>391.2</b>	<b>£ 3.00</b>	<b>391.2</b>	<b>£ 3.80</b>				
<b>489.0</b>	<b>£ 3.20</b>	<b>489.0</b>	<b>£ 4.00</b>				
<b>586.8</b>	<b>£ 3.40</b>	<b>586.8</b>	<b>£ 4.20</b>				
<b>684.6</b>	<b>£ 3.60</b>	<b>684.6</b>	<b>£ 4.40</b>				
857.1	£ 3.80	857.1	£ 4.60				
1029.6	£ 4.00	1029.6	£ 4.80				
1202.1	£ 4.20	1202.1	£ 5.00				
1374.6	£ 4.40	1374.6	£ 5.20				
1547.1	£ 4.60	1547.1	£ 5.40				
<b>1719.6</b>	<b>£ 4.80</b>	<b>1719.6</b>	<b>£ 5.60</b>	<b>1 mile = 1760 yards</b>			
1892.1	£ 5.00	1892.1	£ 5.80	1	£ 4.80	£ 5.60	16.67%
2064.6	£ 5.20	2064.6	£ 6.00				
2237.1	£ 5.40	2237.1	£ 6.20				
2409.6	£ 5.60	2409.6	£ 6.40				
2582.1	£ 5.80	2582.1	£ 6.60				
2754.6	£ 6.00	2754.6	£ 6.80				
2927.1	£ 6.20	2927.1	£ 7.00				
3099.6	£ 6.40	3099.6	£ 7.20				
3272.1	£ 6.60	3272.1	£ 7.40				
<b>3444.6</b>	<b>£ 6.80</b>	<b>3444.6</b>	<b>£ 7.60</b>	<b>2 mile = 3520 yards</b>			
3617.1	£ 7.00	3617.1	£ 7.80	2	£ 6.80	£ 7.60	11.76%
3789.6	£ 7.20	3789.6	£ 8.00				
3962.1	£ 7.40	3962.1	£ 8.20				
4134.6	£ 7.60	4134.6	£ 8.40				
4307.1	£ 7.80	4307.1	£ 8.60				
4479.6	£ 8.00	4479.6	£ 8.80				
4652.1	£ 8.20	4652.1	£ 9.00				
4824.6	£ 8.40	4824.6	£ 9.20				
4997.1	£ 8.60	4997.1	£ 9.40				
<b>5169.6</b>	<b>£ 8.80</b>	<b>5169.6</b>	<b>£ 9.60</b>	<b>3 mile = 5280 yards</b>			
5342.1	£ 9.00	5342.1	£ 9.80	3	£ 8.80	£ 9.60	9.09%
5514.6	£ 9.20	5514.6	£ 10.00				
5687.1	£ 9.40	5687.1	£ 10.20				
5859.6	£ 9.60	5859.6	£ 10.40				



# TARIFF TWO COMPARISON; PROPOSED FARES against CURRENT FARES

CURRENT FARE TARIFF 2 (+13.3%) (£2.04 per mile)		PROPOSED FARE TARIFF 2 (+6.25%) (£2.04 per mile)		DISTANCE TRAVELLED in WHOLE MILES	CURRENT FARE at THIS DISTANCE	PROPOSED FARE at THIS DISTANCE	PERCENT INCREASE of PROPOSED FARE
Distance in Yards	Fare at This Distance	Distance in Yards	Fare at This Distance				
6032.1	£ 9.80	6032.1	£ 10.60				
6204.6	£ 10.00	6204.6	£ 10.80				
6377.1	£ 10.20	6377.1	£ 11.00				
6549.6	£ 10.40	6549.6	£ 11.20				
6722.1	£ 10.60	6722.1	£ 11.40				
<b>6894.6</b>	<b>£ 10.80</b>	6894.6	£ 11.60	4 mile = 7040 yards			
7067.1	£ 11.00	7067.1	£ 11.80	4	£ 10.80	£ 11.60	7.41%
7239.6	£ 11.20	<b>7239.6</b>	<b>£ 12.00</b>				
7412.1	£ 11.40	7412.1	£ 12.20				
7584.6	£ 11.60	7584.6	£ 12.40				
7757.1	£ 11.80	7757.1	£ 12.60				
7929.6	£ 12.00	7929.6	£ 12.80				
8102.1	£ 12.20	8102.1	£ 13.00				
8274.6	£ 12.40	8274.6	£ 13.20				
8447.1	£ 12.60	8447.1	£ 13.40				
8619.6	£ 12.80	8619.6	£ 13.60	5 mile = 8800 yards			
<b>8792.1</b>	<b>£ 13.00</b>	8792.1	£ 13.80	5	£ 13.00	£ 13.80	6.15%
8964.6	£ 13.20	<b>8964.6</b>	<b>£ 14.00</b>				
9137.1	£ 13.40	9137.1	£ 14.20				
9309.6	£ 13.60	9309.6	£ 14.40				
9482.1	£ 13.80	9482.1	£ 14.60				
9654.6	£ 14.00	9654.6	£ 14.80				
9827.1	£ 14.20	9827.1	£ 15.00				
9999.6	£ 14.40	9999.6	£ 15.20				
10172.1	£ 14.60	10172.1	£ 15.40				
10344.6	£ 14.80	10344.6	£ 15.60				
<b>10517.1</b>	<b>£ 15.00</b>	10517.1	£ 15.80	6 mile = 10560 yards			
10689.6	£ 15.20	10689.6	£ 16.00	6	£ 15.00	£ 15.80	5.33%
10862.1	£ 15.40	<b>10862.1</b>	<b>£ 16.20</b>				
11034.6	£ 15.60	11034.6	£ 16.40				
11207.1	£ 15.80	11207.1	£ 16.60				
11379.6	£ 16.00	11379.6	£ 16.80				
11552.1	£ 16.20	11552.1	£ 17.00				
11724.6	£ 16.40	11724.6	£ 17.20				
11897.1	£ 16.60	11897.1	£ 17.40				
12069.6	£ 16.80	12069.6	£ 17.60				
<b>12242.1</b>	<b>£ 17.00</b>	12242.1	£ 17.80	7 mile = 12320 yards			
12414.6	£ 17.20	12414.6	£ 18.00	7	£ 17.00	£ 17.80	4.71%
12587.1	£ 17.40	<b>12587.1</b>	<b>£ 18.20</b>				
12759.6	£ 17.60	12759.6	£ 18.40				
12932.1	£ 17.80	12932.1	£ 18.60				
13104.6	£ 18.00	13104.6	£ 18.80				
13277.1	£ 18.20	13277.1	£ 19.00				
13449.6	£ 18.40	13449.6	£ 19.20				
13622.1	£ 18.60	13622.1	£ 19.40				

## TARIFF TWO COMPARISON; PROPOSED FARES against CURRENT FARES

[illegible]



## TARIFF TWO COMPARISON; PROPOSED FARES against CURRENT FARES

[illegible]

# TARIFF THREE COMPARISON; PROPOSED FARES against CURRENT FARES

<b><u>NIGHT RATE</u></b> <b><u>Friday and Saturday</u></b> <b><u>From 23.00hrs to 07.00hrs</u></b> <b><u>AND Boxing Day</u></b> <b><u>From 00.00hrs to 24.00hrs</u></b> <b><u>AND Christmas Eve</u></b> <b><u>AND New Year's Eve</u></b> <b><u>From 19.00hrs to 24.00hrs</u></b>		<b><u>NIGHT RATE</u></b> <b><u>Friday and Saturday From</u></b> <b><u>22.00hrs to 07.00hrs AND</u></b> <b><u>Boxing Day</u></b> <b><u>From 00.00hrs to 24.00hrs</u></b> <b><u>AND Christmas Eve AND</u></b> <b><u>New Year's Eve From</u></b> <b><u>18.00hrs to 24.00hrs</u></b>		<b>COMPARISON:</b>  <b>CURRENT and PROPOSED FARES</b>  <b>at</b>  <b>DISTANCES in WHOLE MILES</b>			
<b>CURRENT FARE</b> <b>TARIFF 3 (+22.8%)</b> <b>(£2.21 per mile)</b>		<b>PROPOSED FARE</b> <b>TARIFF 3 (+15.1%)</b> <b>(£2.21 per mile)</b>		DISTANCE TRAVELLED in WHOLE MILES	CURRENT FARE at THIS DISTANCE	PROPOSED FARE at THIS DISTANCE	PERCENT INCREASE of PROPOSED FARE
Distance in Yards	Fare at This Distance	Distance in Yards	Fare at This Distance				
Flag: 0	£ 2.60	Flag: 0	£ 3.20				
180.5	£ 2.80	180.5	£ 3.40				
270.8	£ 3.00	270.8	£ 3.60				
361.1	£ 3.20	361.1	£ 3.80				
451.4	£ 3.40	451.4	£ 4.00				
541.7	£ 3.60	541.7	£ 4.20				
632.0	£ 3.80	632.0	£ 4.40				
791.3	£ 4.00	791.3	£ 4.60				
950.6	£ 4.20	950.6	£ 4.80				
1109.9	£ 4.40	1109.9	£ 5.00				
1269.2	£ 4.60	1269.2	£ 5.20				
1428.5	£ 4.80	1428.5	£ 5.40	1 mile = 1760 yards			
1587.8	£ 5.00	1587.8	£ 5.60	1	£ 5.20	£ 5.80	11.54%
1747.1	£ 5.20	1747.1	£ 5.80				
1906.4	£ 5.40	1906.4	£ 6.00				
2065.7	£ 5.60	2065.7	£ 6.20				
2225.0	£ 5.80	2225.0	£ 6.40				
2384.3	£ 6.00	2384.3	£ 6.60				
2543.6	£ 6.20	2543.6	£ 6.80				
2702.9	£ 6.40	2702.9	£ 7.00				
2862.2	£ 6.60	2862.2	£ 7.20				
3021.5	£ 6.80	3021.5	£ 7.40				
3180.8	£ 7.00	3180.8	£ 7.60				
3340.1	£ 7.20	3340.1	£ 7.80	2 mile = 3520 yards			
3499.4	£ 7.40	3499.4	£ 8.00	2	£ 7.40	£ 8.00	8.11%
3658.7	£ 7.60	3658.7	£ 8.20				
3818.0	£ 7.80	3818.0	£ 8.40				
3977.3	£ 8.00	3977.3	£ 8.60				
4136.6	£ 8.20	4136.6	£ 8.80				
4295.9	£ 8.40	4295.9	£ 9.00				
4455.2	£ 8.60	4455.2	£ 9.20				
4614.5	£ 8.80	4614.5	£ 9.40				
4773.8	£ 9.00	4773.8	£ 9.60				
4933.1	£ 9.20	4933.1	£ 9.80				
5092.4	£ 9.40	5092.4	£ 10.00	3 mile = 5280 yards			
5251.7	£ 9.60	5251.7	£ 10.20	3	£ 9.60	£ 10.20	6.25%
5411.0	£ 9.80	5411.0	£ 10.40				



# TARIFF THREE COMPARISON; PROPOSED FARES against CURRENT FARES

CURRENT FARE TARIFF 3 (+22.8%) (£2.21 per mile)		PROPOSED FARE TARIFF 3 (+15.1%) (£2.21 per mile)		DISTANCE TRAVELLED in WHOLE MILES	CURRENT FARE at THIS DISTANCE	PROPOSED FARE at THIS DISTANCE	PERCENT INCREASE of PROPOSED FARE
Distance in Yards	Fare at This Distance	Distance in Yards	Fare at This Distance				
5570.3	£ 10.00	5570.3	£ 10.60				
5729.6	£ 10.20	5729.6	£ 10.80				
5888.9	£ 10.40	5888.9	£ 11.00				
6048.2	£ 10.60	6048.2	£ 11.20				
6207.5	£ 10.80	6207.5	£ 11.40				
6366.8	£ 11.00	6366.8	£ 11.60				
6526.1	£ 11.20	6526.1	£ 11.80				
6685.4	£ 11.40	6685.4	£ 12.00				
6844.7	£ 11.60	6844.7	£ 12.20				
<b>7004.0</b>	<b>£ 11.80</b>	7004.0	£ 12.40	<b>4 mile = 7040 yards</b>			
7163.3	£ 12.00	7163.3	£ 12.60	<b>4</b>	<b>£ 11.80</b>	<b>£ 12.40</b>	<b>5.08%</b>
7322.6	£ 12.20	<b>7322.6</b>	<b>£ 12.80</b>				
7481.9	£ 12.40	7481.9	£ 13.00				
7641.2	£ 12.60	7641.2	£ 13.20				
7800.5	£ 12.80	7800.5	£ 13.40				
7959.8	£ 13.00	7959.8	£ 13.60				
8119.1	£ 13.20	8119.1	£ 13.80				
8278.4	£ 13.40	8278.4	£ 14.00				
8437.7	£ 13.60	8437.7	£ 14.20				
8597.0	£ 13.80	8597.0	£ 14.40				
<b>8756.3</b>	<b>£ 14.00</b>	8756.3	£ 14.60	<b>5 mile = 8800 yards</b>			
8915.6	£ 14.20	8915.6	£ 14.80	<b>5</b>	<b>£ 14.00</b>	<b>£ 14.60</b>	<b>4.29%</b>
9074.9	£ 14.40	<b>9074.9</b>	<b>£ 15.00</b>				
9234.2	£ 14.60	9234.2	£ 15.20				
9393.5	£ 14.80	9393.5	£ 15.40				
9552.8	£ 15.00	9552.8	£ 15.60				
9712.1	£ 15.20	9712.1	£ 15.80				
9871.4	£ 15.40	9871.4	£ 16.00				
10030.7	£ 15.60	10030.7	£ 16.20				
10190.0	£ 15.80	10190.0	£ 16.40				
10349.3	£ 16.00	10349.3	£ 16.60				
<b>10508.6</b>	<b>£ 16.20</b>	10508.6	£ 16.80	<b>6 mile = 10560 yards</b>			
10667.9	£ 16.40	10667.9	£ 17.00	<b>6</b>	<b>£ 16.20</b>	<b>£ 16.80</b>	<b>3.70%</b>
10827.2	£ 16.60	<b>10827.2</b>	<b>£ 17.20</b>				
10986.5	£ 16.80	10986.5	£ 17.40				
11145.8	£ 17.00	11145.8	£ 17.60				
11305.1	£ 17.20	11305.1	£ 17.80				
11464.4	£ 17.40	11464.4	£ 18.00				
11623.7	£ 17.60	11623.7	£ 18.20				
11783.0	£ 17.80	11783.0	£ 18.40				
11942.3	£ 18.00	11942.3	£ 18.60				
12101.6	£ 18.20	12101.6	£ 18.80				
<b>12260.9</b>	<b>£ 18.40</b>	12260.9	£ 19.00	<b>7 mile = 12320 yards</b>			
12420.2	£ 18.60	12420.2	£ 19.20	<b>7</b>	<b>£ 18.40</b>	<b>£ 19.00</b>	<b>3.26%</b>
12579.5	£ 18.80	12579.5	£ 19.40				
12738.8	£ 19.00	<b>12738.8</b>	<b>£ 19.60</b>				

## TARIFF THREE COMPARISON; PROPOSED FARES against CURRENT FARES

[illegible]



# TARIFF THREE COMPARISON; PROPOSED FARES against CURRENT FARES

CURRENT FARE TARIFF 3 (+22.8%) (£2.21 per mile)		PROPOSED FARE TARIFF 3 (+15.1%) (£2.21 per mile)		DISTANCE TRAVELLED in WHOLE MILES	CURRENT FARE at THIS DISTANCE	PROPOSED FARE at THIS DISTANCE	PERCENT INCREASE of PROPOSED FARE
Distance in Yards	Fare at This Distance	Distance in Yards	Fare at This Distance				
				1 Mile	£ 5.20	£ 5.80	
				2 Miles	£ 7.40	£ 8.00	
				3 Miles	£ 9.60	£ 10.20	
				4 Miles	£ 11.80	£ 12.40	
				5 Miles	£ 14.00	£ 14.60	
				6 Miles	£ 16.20	£ 16.80	
				7 Miles	£ 18.40	£ 19.00	
				8 Miles	£ 20.60	£ 21.20	
				9 Miles	£ 22.80	£ 23.40	
				10 Miles	£ 25.00	£ 25.60	
PERCENTAGE INCREASE OF AGGREGATE PROPOSED FARES FROM 1 TO 10 MILES				=	£151.00	£157.0	3.97%



# TARIFF 4 COMPARISON; PROPOSED FARES against CURRENT FARES

CHRISTMAS DAY & NEW YEAR'S DAY <u>Christmas Day; From</u> <u>00.00hrs to 24.00hrs</u> <u>New Year's Day; From</u> <u>00.00hrs to 07.00hrs</u>		CHRISTMAS DAY & NEW YEAR'S DAY <u>Christmas Day; From</u> <u>00.00hrs to 24.00hrs</u> <u>New Year's Day; From</u> <u>00.00hrs to 07.00hrs</u>		COMPARISON  CURRENT & PROPOSED FARES  at  DISTANCES in WHOLE MILES			
CURRENT FARE TARIFF 4 (+51.1%) £2.72 per mile		PROPOSED FARE TARIFF 4 (+56.2%) £3.00 per mile		DISTANCE TRAVELLED in WHOLE MILES	CURRENT FARE at THIS DISTANCE	PROPOSED FARE at THIS DISTANCE	PERCENT INCREASE of PROPOSED FARE
Distance in Yards	Fare at This Distance	Distance in Yards	Fare at This Distance				
<b>Flag: 0</b>	<b>£ 3.00</b>	<b>Flag: 0</b>	<b>£ 4.20</b>				
<b>220.0</b>	<b>£ 3.30</b>	<b>220.0</b>	<b>£ 4.50</b>				
<b>330.0</b>	<b>£ 3.60</b>	<b>330.0</b>	<b>£ 4.80</b>				
<b>440.0</b>	<b>£ 3.90</b>	<b>440.0</b>	<b>£ 5.10</b>				
<b>550.0</b>	<b>£ 4.20</b>	<b>550.0</b>	<b>£ 5.40</b>				
<b>660.0</b>	<b>£ 4.50</b>	<b>660.0</b>	<b>£ 5.70</b>				
<b>770.0</b>	<b>£ 4.80</b>	<b>770.0</b>	<b>£ 6.00</b>				
964.1	£ 5.10	946.0	£ 6.30				
1158.2	£ 5.40	1122.0	£ 6.60				
1352.3	£ 5.70	1298.0	£ 6.90				
1546.4	£ 6.00	1474.0	£ 7.20				
<b>1740.5</b>	<b>£ 6.30</b>	<b>1650.0</b>	<b>£ 7.50</b>	<b>1 mile = 1760 yards</b>			
1934.6	£ 6.60	1826.0	£ 7.80	<b>1</b>	<b>£ 6.30</b>	<b>£ 7.50</b>	<b>19.05%</b>
2128.7	£ 6.90	2002.0	£ 8.10				
2322.8	£ 7.20	2178.0	£ 8.40				
2516.9	£ 7.50	2354.0	£ 8.70				
2711.0	£ 7.80	2530.0	£ 9.00				
2905.1	£ 8.10	2706.0	£ 9.30				
3099.2	£ 8.40	2882.0	£ 9.60				
3293.3	£ 8.70	3058.0	£ 9.90				
<b>3487.4</b>	<b>£ 9.00</b>	<b>3234.0</b>	<b>£ 10.20</b>	<b>2 mile = 3520 yards</b>			
3681.5	£ 9.30	3410.0	£ 10.50	<b>2</b>	<b>£ 9.00</b>	<b>£ 10.50</b>	<b>16.67%</b>
3875.6	£ 9.60	3586.0	£ 10.80				
4069.7	£ 9.90	3762.0	£ 11.10				
4263.8	£ 10.20	3938.0	£ 11.40				
4457.9	£ 10.50	4114.0	£ 11.70				
4652.0	£ 10.80	4290.0	£ 12.00				
4846.1	£ 11.10	4466.0	£ 12.30				
5040.2	£ 11.40	4642.0	£ 12.60				
<b>5234.3</b>	<b>£ 11.70</b>	<b>4818.0</b>	<b>£ 12.90</b>	<b>3 mile = 5280 yards</b>			
5428.4	£ 12.00	4994.0	£ 13.20	<b>3</b>	<b>£ 11.70</b>	<b>£ 13.50</b>	<b>15.38%</b>
5622.5	£ 12.30	5170.0	£ 13.50				
5816.6	£ 12.60	5346.0	£ 13.80				
6010.7	£ 12.90	5522.0	£ 14.10				
6204.8	£ 13.20	5698.0	£ 14.40				

# NO CHANGE TARIFF 4 CURRENT FARES

CURRENT FARE TARIFF 4 (+51.1%) £2.72 per mile		PROPOSED FARE TARIFF 4 (+56.2%) £3.00 per mile		DISTANCE TRAVELLED in WHOLE MILES	CURRENT FARE at THIS DISTANCE		PERCENT INCREASE of PROPOSED FARE
Distance in Yards	Fare at This Distance	Distance in Yards	Fare at This Distance				
6398.9	£ 13.50	5874.0	£ 14.70				
6593.0	£ 13.80	6050.0	£ 15.00				
6787.1	£ 14.10	6226.0	£ 15.30				
<b>6981.2</b>	<b>£ 14.40</b>	6402.0	£ 15.60	<b>4 mile = 7040 yards</b>			
7175.3	£ 14.70	6578.0	£ 15.90	<b>4</b>	<b>£ 14.40</b>	<b>£ 16.50</b>	<b>14.58%</b>
7369.4	£ 15.00	6754.0	£ 16.20				
7563.5	£ 15.30	6930.0	£ 16.50				
7757.6	£ 15.60	7106.0	£ 16.80				
7951.7	£ 15.90	7282.0	£ 17.10				
8145.8	£ 16.20	7458.0	£ 17.40				
8339.9	£ 16.50	7634.0	£ 17.70				
8534.0	£ 16.80	7810.0	£ 18.00				
<b>8728.1</b>	<b>£ 17.10</b>	7986.0	£ 18.30	<b>5 mile = 8800 yards</b>			
8922.2	£ 17.40	8162.0	£ 18.60	<b>5</b>	<b>£ 17.10</b>	<b>£ 19.50</b>	<b>14.04%</b>
9116.3	£ 17.70	8338.0	£ 18.90				
9310.4	£ 18.00	8514.0	£ 19.20				
9504.5	£ 18.30	8690.0	£ 19.50				
9698.6	£ 18.60	8866.0	£ 19.80				
9892.7	£ 18.90	9042.0	£ 20.10				
10086.8	£ 19.20	9218.0	£ 20.40				
10280.9	£ 19.50	9394.0	£ 20.70				
<b>10475.0</b>	<b>£ 19.80</b>	9570.0	£ 21.00	<b>6 mile = 10560 yards</b>			
10669.1	£ 20.10	9746.0	£ 21.30	<b>6</b>	<b>£ 19.80</b>	<b>£ 22.50</b>	<b>13.64%</b>
10863.2	£ 20.40	9922.0	£ 21.60				
11057.3	£ 20.70	10098.0	£ 21.90				
11251.4	£ 21.00	10274.0	£ 22.20				
11445.5	£ 21.30	10450.0	£ 22.50				
11639.6	£ 21.60	10626.0	£ 22.80				
11833.7	£ 21.90	10802.0	£ 23.10				
12027.8	£ 22.20	10978.0	£ 23.40				
<b>12221.9</b>	<b>£ 22.50</b>	11154.0	£ 23.70	<b>7 mile = 12320 yards</b>			
12416.0	£ 22.80	11330.0	£ 24.00	<b>7</b>	<b>£ 22.50</b>	<b>£ 25.50</b>	<b>13.33%</b>
12610.1	£ 23.10	11506.0	£ 24.30				
12804.2	£ 23.40	11682.0	£ 24.60				
12998.3	£ 23.70	11858.0	£ 24.90				
13192.4	£ 24.00	12034.0	£ 25.20				
13386.5	£ 24.30	12210.0	£ 25.50				
13580.6	£ 24.60	12386.0	£ 25.80				
13774.7	£ 24.90	12562.0	£ 26.10				
<b>13968.8</b>	<b>£ 25.20</b>	12738.0	£ 26.40	<b>8 mile = 14080 yards</b>			
14162.9	£ 25.50	12914.0	£ 26.70	<b>8</b>	<b>£ 25.20</b>	<b>£ 28.50</b>	<b>13.10%</b>
14357.0	£ 25.80	13090.0	£ 27.00				
14551.1	£ 26.10	13266.0	£ 27.30				
14745.2	£ 26.40	13442.0	£ 27.60				



# TARIFF FOUR COMPARISON; PROPOSED FARE against CURRENT FARES

CURRENT FARE TARIFF 4 (+51.1%) £2.72 per mile		PROPOSED FARE TARIFF 4 (+56.2%) £3.00 per mile		DISTANCE TRAVELLED in WHOLE MILES	CURRENT FARE at THIS DISTANCE		PERCENT INCREASE of PROPOSED FARE
Distance in Yards	Fare at This Distance	Distance in Yards	Fare at This Distance				
14939.3	£ 26.70	13618.0	£ 27.90				
15133.4	£ 27.00	13794.0	£ 28.20				
15327.5	£ 27.30	13970.0	£ 28.50				
15521.6	£ 27.60	14146.0	£ 28.80				
<b>15715.7</b>	<b>£ 27.90</b>	14322.0	£ 29.10				
15909.8	£ 28.20	14498.0	£ 29.40				
16103.9	£ 28.50	14674.0	£ 29.70	<b>9 mile = 15840 yards</b>			
16298.0	£ 28.80	14850.0	£ 30.00	9	£ 27.90	£ 31.50	12.90%
16492.1	£ 29.10	15026.0	£ 30.30				
16686.2	£ 29.40	15202.0	£ 30.60				
16880.3	£ 29.70	15378.0	£ 30.90				
17074.4	£ 30.00	15554.0	£ 31.20				
17268.5	£ 30.30	15730.0	£ 31.50				
<b>17462.6</b>	<b>£ 30.60</b>	15906.0	£ 31.80				
17656.7	£ 30.90	16082.0	£ 32.10				
17850.8	£ 31.20	16258.0	£ 32.40	<b>10 mile = 17600 yards</b>			
		16434.0	£ 32.70	10	£ 30.60	£34.50	12.75%
		16610.0	£ 33.00				
		16786.0	£ 33.30				
		16962.0	£ 33.60				
		17138.0	£ 33.90				
		17314.0	£ 34.20				
		17490.0	£ 34.50				
		17666.0	£ 34.80				

## NO CHANGE TARIFF 4 CURRENT FARES

[illegible]

# TIME CHANGES FOR CURRENT TARIFF ONE ONLY

CURRENT TARIFFS	UNIT PRICE CHARGE	TIME IN SECONDS PER UNIT	EQUIVALENT HOURLY RATE
CURRENT TARIFF ONE; <b>INCREASE</b> DAY RATE; (Monday to Saturday from 07.00hrs to 23.00hrs excluding those days & times as in Tariffs Two, Three and Four)	20 pence	42.8 secs	£16.82
TARIFF TWO; <b>NO CHANGE</b> NIGHT RATE; (Sunday to Thursday from 23.00hrs to 04.00hrs AND Every Sunday & All Bank Holidays except Boxing Day from 07.00hrs to 23.00hrs)	20 pence	40.0 secs	£18.00
TARIFF THREE; <b>NO CHANGE</b> NIGHT RATE; (Friday and Saturday from 23.00hrs to 07.00hrs AND Boxing Day from 00.01hrs to 24.00hrs AND Christmas Eve & New Year's Eve from 19.00hrs to 24.00hrs)	20 pence	36.9 secs	£19.50
TARIFF FOUR; <b>NO CHANGE</b> CHRISTMAS and NEW YEAR RATE (Christmas Day from 00.01hrs to 24.00hrs AND New Year's Day from 00.01hrs to 07.00hrs)	30 pence	45.0 secs	£24.00



# Information in Support of a Variation in the Hackney Carriage Table of Fares

1. The Hackney Carriage trade respectfully ask Birmingham City Council Licensing Committee for a variation in the Hackney Carriage Table of Fares.
2. The last increase in the Hackney Carriage Table of Fares was February 2012 and was implemented in **June 2012**.
3. It is now **10** years since the Hackney Carriage trade applied for an increase in the Table of Fares.
4. This application for a variation in the Hackney Carriage Table of Fares is for an increase in Initial Charges on **Tariffs One, Two, Three & Four** and an increase in Distance Charges on **Tariff One & Tariff Four**.
5. There is a proposal for an increase in the Initial Charge (**The Flag Drop**) for Tariff One from **£2.20** to **£3.20**, an increase of **£1.00**.
6. On Tariff One the proposed variation in Distance Charges equates to an average percentage increase in the aggregate proposed fares at one mile distances for the first ten miles of **13%**. This represents a proposed increase of **1.23%** per annum for the last 10 years since the last application for a variation in the Table of Fares in **February 2012**.
7. The proposed variation in Waiting Time Charges on Tariff One is an increase of **£1.10** pence per hour which equates to a percentage increase of **7%**. This represents a proposed increase of **0.7%** per annum for the last **10** years since the last application for a variation in the Table of Fares in **February 2012**.
8. There is a proposal to change the operational **end time** of Tariff One from **23:00hrs** to **22:00hrs**. Current **end time** for Tariff One is **23:00hrs**.
9. There is a proposal for an increase in the Initial Charge (**The Flag Drop**) for Tariff Two from **£2.40** to **£3.20**, an increase of **£0.80p**.
10. The Hackney Carriage trade are not seeking an increase in Distance Charges or Waiting Time Charges on Tariff Two.
11. There is a proposal to change the operational **start time** of Tariff Two from **23:00hrs** to **22:00hrs**. Current **start time** for Tariff Two is **23:00hrs**.
12. There is a proposal for an increase in the Initial Charge (**The Flag Drop**) for Tariff Three from **£2.60** to **£3.20**, an increase of **£0.60p**.
13. The Hackney Carriage trade are not seeking an increase in Distance Charges or Waiting Time Charges on Tariff Three.
14. There is a proposal to change the operational **start time** of Tariff Three from **23:00hrs** to **22:00hrs**. Current **start time** for Tariff Three is **23:00hrs**. ~~On Christmas Eve and on New Years Eve we propose the start time of Tariff Three change from 19:00hrs to 18:00hrs. The current start time of Tariff Three on Christmas Eve and New Years Eve is 19:00hrs.~~

**15.** There is a proposal for an increase in the Initial Charge (The Flag Drop) for Tariff Four from **£3.00** to **£4.20**, an increase of **£1.20p**.

**16.** On Tariff Four the proposed variation in Distance Charges equates to an average percentage increase in the aggregate proposed fares at one mile distances for the first ten miles of **14%**. This represents a proposed increase of **1.31%** per annum for the last 10 years since the last application for a variation in the Table of Fares in **February 2012**. The Hackney Carriage trade are not seeking an increase in **Distance Charges** or **Waiting Time Charges** on Tariff Four.

**17.** The Hackney Carriage trade is not seeking an increase in the Soilage Charge on any of the tariffs.

**18.** The existing Table of Fares mandates that night tariffs finish at **04.00hrs** on weekday mornings and at **07.00hrs** on Saturday and Sunday mornings. The Hackney Carriage trade is not seeking any changes.

**19.** The percentage changes in the Consumer Price Index [All Items] over 12 Month periods from February 2012 (the date of the last application for a variation in the Table of Fares) to February 2021 are provided by the ONS website, for example:

- February 2012 to February 2013; **+ 2.4%**
- February 2013 to February 2014; **+ 1.4%**
- February 2014 to February 2015; **+ 0.0%**
- February 2020 to February 2021; **+ 3.4%**

This information is from the Office for National Statistics website.

This represents a total percentage increase of **17.00%** in the Consumer Price Index for the **10 year** period from **February 2012** (the date of the last application for a variation in the Table of Fares) to **February 2021**

**Source;**

**<https://www.ons.gov.uk/economy/inflationandpriceindices/timeseries/ead6/mm23>**

**20.** The percentage changes in the Retail Prices Index [**All Items**] over **12 Month** periods from **February 2012** (the date of the last application for a variation in the Table of Fares) to **February 2021** are provided by the ONS website, for example:

- February 2012 to February 2013; **+ 3.0 %**
- February 2013 to February 2014; **+ 2.4 %**
- February 2014 to February 2015; **+ 1.0 %**
- February 2020 to February 2021; **+ 4.1 %**

This information is from the Office for National Statistics website.

This represents a total percentage increase of **25.8%** in the Retail Price Index for the **10 year** period from **February 2012** (the date of the last application for a variation in the Table of Fares) to **February 2021**.

Source;

<https://www.ons.gov.uk/economy/inflationandpriceindices/timeseries/czeq/mm23>

~~21. The Hackney Carriage trade is seeking an increase in Extra Charges on all of the tariffs for the carriage of domestic pets outside of suitable pet carriers, bulky items such as domestic & office furniture, domestic & commercial appliances, bicycles, boxed items with a total volume equal to or in excess of 0.5 cubic metres.~~

~~- £5.00 is justified for carriage of pets for cleaning the vehicle afterwards.~~

~~- £15.00 is justified for carriage of bulky items such as washing machines, televisions, Mattresses, etc. The list is not exhaustive and refers to situations where a 'man with a van' or an actual removal company would be most appropriate.~~

22. Since the last application for an increase in the Table of Fares, living costs have escalated noticeably and household bills continue to increase.

23. Hackney Carriage proprietors can no longer continue to absorb these relentless increases in operating costs and overheads and drivers also need to balance their household budgets.

24. The Hackney Carriage trade therefore respectfully ask that the Licensing Committee approve the proposed increase in the Table of Fares, not only to enable Hackney Carriage proprietors to arrest their spiralling operating costs and thereby continue to maintain their vehicles to the high standards required for the travelling public's safety, but also to help all drivers in the trade to try to preserve a minimum standard of living.

25. The Hackney Carriage trade would like to highlight the importance of an increase in tariff for Hackneys to continue as a viable form of employment in view of the fact that Hackney numbers have now dropped to an alarming low of 627.

# SUMMARY of PROPOSED VARIATIONS in the HACKNEY CARRIAGE TABLE of FARES

	TARIFF ONE	TARIFF TWO	TARIFF THREE	TARIFF FOUR
<b>INITIAL CHARGE - FLAG DROP;</b> Current Flag Drop: <i>PROPOSED FLAG DROP:</i> <b>CHANGES</b>	£2.20 £3.20 £1 INCREASE	£2.40 £3.20 80p INCREASE	£2.60 £3.20 60p INCREASE	£3.00 £4.20 £1.20 INCREASE
<b>FIRST MILE;</b> Current First Mile Charge: <i>PROPOSED FIRST MILE CHARGE:</i> <b>CHANGES</b> (First Mile)	£4.40 £5.40 £1 INCREASE	£4.80 £5.60 80p INCREASE	£5.20 £5.80 60p INCREASE	£6.30 £7.50 £1.20 INCREASE
<b>MILEAGE CHARGE</b> (Thereafter); Current Mileage Charge: <i>PROPOSED MILEAGE CHARGE:</i> <b>CHANGES</b> (per Mile)	£1.80 £1.92 12p INCREASE	£2.04 £2.04 NO CHANGE	£2.21 £2.21 NO CHANGE	£2.12 £3.00 28p INCREASE
<b>WAITING &amp; TIME CHARGES;</b> Current Time Charges per Hour: <i>PROPOSED TIME CHARGES per HOUR:</i> <b>CHANGES</b> (per Hour)	£15.72 £16.82 £1.10 INCREASE	£18.00 £18.00 NO CHANGE	£19.50 £19.50 NO CHANGE	£24.00 £24.00 NO CHANGE
<b>SOILAGE CHARGES;</b> Current Soilage Charges: <i>PROPOSED SO/LAGE CHARGES:</i>	£40.00 £40.00 NO CHANGE	£40.00 £40.00 NO CHANGE	£40.00 £40.00 NO CHANGE	£60.00 £60.00 NO CHANGE
<b>EXTRA CHARGES;</b>	<b>YES</b>	<b>YES</b>	<b>YES</b>	<b>YES</b>

# BIRMINGHAM CITY COUNCIL HACKNEY CARRIAGE - TABLE of FARES

**It is a criminal offence TO NOT PAY THE TAXI FARE, which is covered by The Theft Act 1968, The Theft Act 1978 and The Fraud Act 2006.**

The taximeter is programmed to select the correct tariff automatically, from the tariffs as detailed below, depending on the date, day and time of day that the Hackney Carriage is being hired using real time clock tariff changes in hired mode.

<b>TARIFF ONE: STANDARD DAY RATE</b> Applicable Monday to Friday From 04.00hrs to 22.00hrs AND on Saturday - From 07.00hrs to 22.00hrs (EXCEPT for those days and times as specified in Tariffs Two, Three and Four)	<b>TARIFF TWO: WEEKDAY NIGHT RATE</b> Applicable Sunday to Thursday - From 22.00hrs to 04.00hrs the next day AND on Sunday - From 07.00hrs to 22.00hrs AND All Bank Holidays - From 00.00hrs to 22.00hrs. (EXCEPT for those days and times as specified in Tariffs Three & Four)
<b>TARIFF THREE: WEEKEND NIGHT RATE</b> Applicable Friday and Saturday - From 22.00hrs to 07.00hrs the next day AND on Boxing Day - From 00.00hrs to 24.00hrs AND on Christmas Eve - From 18.00hrs 19.00hrs to 24.00hrs AND on New Year's Eve - From 18.00hrs 19.00hrs to 24.00hrs	<b>TARIFF FOUR: CHRISTMAS &amp; NEW YEAR SEASON</b> Applicable on Christmas Day and New Year's Day On Christmas Day - From 00.00hrs to 24.00hrs A N D On New Year's Day - From 00.00hrs to 07.00hrs

The fare is shown on the taximeter, which records on the basis of time or distance at the following rates.

	<b>TARIFF ONE</b>	<b>TARIFF TWO</b>	<b>TARIFF THREE</b>	<b>TARIFF FOUR</b>
<b>INITIAL CHARGES:</b> A charge of For the first or part thereof	£3.20 187.5 yards	£3.20 195.6 yards	£3.20 180.5 yards	£4.20 220 yards
<b>MILEAGE CHARGES:</b> A charge of For each subsequent or part thereof until have been travelled.	20p 125.0 yards 1062.5 yards	20p 97.8 yards 684.6 yards	20p 90.3 yards 632 yards	30p 110 yards 770 yards
<b>Thereafter:</b> A charge of For each subsequent or part thereof Equivalent to a rate per mile of	20p 183.3 yards £1.92	20p 172.5 yards £2.04	20p 159.3 yards £2.21	30p 176.0 yards £3.00
<b>WAITING &amp; TIME CHARGES:</b> A charge of For each or part thereof Equivalent to an hourly rate of	20p 42.8 sec £16.82	20p 40.0 sec £18.00	20p 36.9 sec £19.50	30p 45.0 secs £24.00
<b>SOILAGE CHARGES:</b> An additional charge may be made in the event of <b>SOILAGE OR FOULING OF THE VEHICLE</b>	£40.00	£40.00	£40.00	£60.00

<b>EXTRA CHARGES:</b>	
For every person in excess of one	20p
For every article of luggage carried outside the passenger compartment	20p
Carriage of any pets (outside of any pet carriers / containers)	£5.00
Carriage of any Bulky Items / Removals	£15.00
Any road toll or barrier charge incurred in the execution of the hiring	

## COMPLAINTS

Any complaint of overcharging, or about this taxi or taxi driver, should be sent in writing to the Enforcement Section, Birmingham City Council, Phoenix House, Valepits Road, Garretts Green, Birmingham B33 0TD, or by telephoning 0121 303 9611, quoting the number of the taxi and the number of the driver's badge. Enquiries regarding property accidentally left in a taxi should be made at the nearest West Midlands Police Station.

# H00000

JUNE 2022



# TARIFF ONE COMPARISON; PROPOSED FARES against CURRENT FARES

DAY RATE Monda' (. to Frida)'. 04.00hrs to 23.00hrs AND SaturdaJ'. 07.00hrs to 23.00hrs		DAY RATE Monda' (. to Friday 04.00hrs to 22.00hrs AND Saturday 07.00hrs to 22.00hrs		COMPARISON:PROPOSED and CURRENT FARES at DISTANCES in WHOLE MILES			
CURRENT FARE TARIFF 1 (£1.80 per mile)		PROPOSED FARE TARIFF 1 (£1.92 per mile)		DISTANCE TRAVELLED	CURRENT FARE	PROPOSED FARE	PERCENT INCREASE
Distance in Yards	Fare at This Distance	Distance in Yards	Fare at This Distance	in WHOLE MILES	at THIS DISTANCE	at THIS DISTANCE	of PROPOSED FARE
<b>Flag</b>	<b>£ 2.20</b>	<b>Flag</b>	<b>£ 3.20</b>				
187.5	£ 2.40	187.5	£ 3.40				
312.5	£ 2.60	312.5	£ 3.60				
437.5	£ 2.80	437.5	£ 3.80				
562.5	£ 3.00	562.5	£ 4.00				
687.5	£ 3.20	687.5	£ 4.20				
812.5	£ 3.40	812.5	£ 4.40				
937.5	£ 3.60	937.5	£ 4.60				
1,062.5	£ 3.80	1,062.5	£ 4.80				
1,258.1	£ 4.00	1,245.8	£ 5.00	1 mile = 1760 yards			
1,453.7	£ 4.20	1,429.1	£ 5.20	1	£ 4.40	£ 5.40	22.73%
1,649.3	£ 4.40	1,612.4	£ 5.40				
1,844.9	£ 4.60	1,795.7	£ 5.60				
2,040.5	£ 4.80	1,979.0	£ 5.80				
2,236.1	£ 5.00	2,162.3	£ 6.00				
2,431.7	£ 5.20	2,345.6	£ 6.20				
2,627.3	£ 5.40	2,528.9	£ 6.40				
2,822.9	£ 5.60	2,712.2	£ 6.60				
3,018.5	£ 5.80	2,895.5	£ 6.80				
3,214.1	£ 6.00	3,078.8	£ 7.00	2 miles = 3520 yards			
3,409.7	£ 6.20	3,262.1	£ 7.20	2	£ 6.20	£ 7.40	19.35%
3,605.3	£ 6.40	3,445.4	£ 7.40				
3,800.9	£ 6.60	3,628.7	£ 7.60				
3,996.5	£ 6.80	3,812.0	£ 7.80				
4,192.1	£ 7.00	3,995.3	£ 8.00				
4,387.7	£ 7.20	4,178.6	£ 8.20				
4,583.3	£ 7.40	4,361.9	£ 8.40				
4,778.9	£ 7.60	4,545.2	£ 8.60				
4,974.5	£ 7.80	4,728.5	£ 8.80	3 miles = 5280 yards			
5,170.1	£ 8.00	4,911.8	£ 9.00	3	£ 8.00	£ 9.40	17.50%
5,365.7	£ 8.20	5,095.1	£ 9.20				
5,561.3	£ 8.40	5,278.4	£ 9.40				
5,756.9	£ 8.60	5,461.7	£ 9.60				
5,952.5	£ 8.80	5,645.0	£ 9.80				
6,148.1	£ 9.00	5,828.3	£ 10.00				
6,343.7	£ 9.20	6,011.6	£ 10.20				
6,539.3	£ 9.40	6,194.9	£ 10.40				
6,734.9	£ 9.60	6,378.2	£ 10.60				

# TARIFF ONE COMPARISON; PROPOSED FARES against CURRENT FARES

CURRENT FARE TARIFF 1 (£1.80 per mile)		PROPOSED FARE TARIFF 1 (£1.92 per mile)		DISTANCE TRAVELLED in WHOLE MILES	CURRENT FARE at THIS DISTANCE	PROPOSED FARE at THIS DISTANCE	PERCENT INCREASE of PROPOSED FARE
Distance in Yards	Fare at This Distance	Distance in Yards	Fare at This Distance				
<b>6,930.5</b>	<b>£ 9.80</b>	6,561.5	£ 10.80	<b>4 miles = 7040 yards</b>			
7,126.1	£ 10.00	<b>6,744.8</b>	<b>£ 11.00</b>	<b>4</b>	<b>£ 9.80</b>	<b>£ 11.20</b>	<b>14.29%</b>
7,321.7	£ 10.20	<b>6,928.1</b>	<b>£ 11.20</b>				
7,517.3	£ 10.40	<b>7,111.4</b>	<b>£ 11.40</b>				
7,712.9	£ 10.60	<b>7,294.7</b>	<b>£ 11.60</b>				
7,908.5	£ 10.80	<b>7,478.0</b>	<b>£ 11.80</b>				
8,104.1	£ 11.00	<b>7,661.3</b>	<b>£ 12.00</b>				
8,299.7	£ 11.20	<b>7,844.6</b>	<b>£ 12.20</b>				
8,495.3	£ 11.40	<b>8,027.9</b>	<b>£ 12.40</b>				
<b>8,690.9</b>	<b>£ 11.60</b>	8,211.2	£ 12.60	<b>5 miles = 5280 yards</b>			
8,886.5	£ 11.80	<b>8,394.5</b>	<b>£ 12.80</b>	<b>5</b>	<b>£ 11.60</b>	<b>£ 13.20</b>	<b>13.79%</b>
9,082.1	£ 12.00	<b>8,577.8</b>	<b>£ 13.00</b>				
9,277.7	£ 12.20	<b>8,761.1</b>	<b>£ 13.20</b>				
9,473.3	£ 12.40	<b>8,944.4</b>	<b>£ 13.40</b>				
9,668.9	£ 12.60	<b>9,127.7</b>	<b>£ 13.60</b>				
9,864.5	£ 12.80	<b>9,311.0</b>	<b>£ 13.80</b>				
10,060.1	£ 13.00	<b>9,494.3</b>	<b>£ 14.00</b>				
10,255.7	£ 13.20	<b>9,677.6</b>	<b>£ 14.20</b>				
<b>10,451.3</b>	<b>£ 13.40</b>	9,860.9	£ 14.40	<b>6 miles = 10560 yards</b>			
10,646.9	£ 13.60	<b>10,044.2</b>	<b>£ 14.60</b>	<b>6</b>	<b>£ 13.40</b>	<b>£ 15.00</b>	<b>11.94%</b>
10,842.5	£ 13.80	<b>10,227.5</b>	<b>£ 14.80</b>				
11,038.1	£ 14.00	<b>10,410.8</b>	<b>£ 15.00</b>				
11,233.7	£ 14.20	<b>10,594.1</b>	<b>£ 15.20</b>				
11,429.3	£ 14.40	<b>10,777.4</b>	<b>£ 15.40</b>				
11,624.9	£ 14.60	<b>10,960.7</b>	<b>£ 15.60</b>				
11,820.5	£ 14.80	<b>11,144.0</b>	<b>£ 15.80</b>				
12,016.1	£ 15.00	<b>11,327.3</b>	<b>£ 16.00</b>				
<b>12,211.7</b>	<b>£ 15.20</b>	11,510.6	£ 16.20	<b>7 miles = 12320 yards</b>			
12,407.3	£ 15.40	<b>11,693.9</b>	<b>£ 16.40</b>	<b>7</b>	<b>£ 15.20</b>	<b>£ 17.00</b>	<b>11.84%</b>
12,602.9	£ 15.60	<b>11,877.2</b>	<b>£ 16.60</b>				
12,798.5	£ 15.80	<b>12,060.5</b>	<b>£ 16.80</b>				
12,994.1	£ 16.00	<b>12,243.8</b>	<b>£ 17.00</b>				
13,189.7	£ 16.20	<b>12,427.1</b>	<b>£ 17.20</b>				
13,385.3	£ 16.40	<b>12,610.4</b>	<b>£ 17.40</b>				
13,580.9	£ 16.60	<b>12,793.7</b>	<b>£ 17.60</b>				
13,776.5	£ 16.80	<b>12,977.0</b>	<b>£ 17.80</b>				
<b>13,972.1</b>	<b>£ 17.00</b>	<b>13,160.3</b>	<b>£ 18.00</b>	<b>8 miles = 14080 yards</b>			
14,167.7	£ 17.20	<b>13,343.6</b>	<b>£ 18.20</b>	<b>8</b>	<b>£ 17.00</b>	<b>£ 19.00</b>	<b>11.76%</b>
14,363.3	£ 17.40	<b>13,526.9</b>	<b>£ 18.40</b>				
14,558.9	£ 17.60	<b>13,710.2</b>	<b>£ 18.60</b>				
14,754.5	£ 17.80	<b>13,893.5</b>	<b>£ 18.80</b>				
14,950.1	£ 18.00	<b>14,076.8</b>	<b>£ 19.00</b>				
15,145.7	£ 18.20	<b>14,260.1</b>	<b>£ 19.20</b>				
15,341.3	£ 18.40	<b>14,443.4</b>	<b>£ 19.40</b>				



# TARIFF ONE COMPARISON; PROPOSED FARES against CURRENT FARES

CURRENT FARE TARIFF 1 (£1.80 per mile)		PROPOSED FARE TARIFF 1 (£1.92 per mile)		DISTANCE TRAVELLED in WHOLE MILES	CURRENT FARE at THIS DISTANCE	PROPOSED FARE at THIS DISTANCE	PERCENT INCREASE of PROPOSED FARE
Distance in Yards	Fare at This Distance	Distance in Yards	Fare at This Distance				
15,536.9	£ 18.60	14,626.7	£ 19.60				
15,732.5	£ 18.80	14,810.0	£ 19.80				
15,928.1	£ 19.00	14,993.3	£ 12.00	9 miles = 15840 yards			
16,123.7	£ 19.20	15,176.6	£ 20.20	9	£ 18.80	£ 20.80	10.64%
16,319.3	£ 19.40	15,359.9	£ 20.40				
16,514.9	£ 19.60	15,543.2	£ 20.60				
16,710.5	£ 19.80	15,726.5	£ 20.80				
16,906.1	£ 20.00	15,909.8	£ 21.00				
17,101.7	£ 20.20	16,093.1	£ 21.20				
17,297.3	£ 20.40	16,276.4	£ 21.40				
17,492.9	£ 20.60	16,459.7	£ 21.60				
17,688.5	£ 20.80	16,643.0	£ 21.80				
17,884.1	£ 21.00	16,826.3	£ 22.00	10 miles = 17600 yards			
		17,009.6	£ 22.20	10	£ 20.60	£ 22.80	10.68%
		17,192.9	£ 22.40				
		17,376.2	£ 22.60				
		17,559.5	£ 22.80				
		17,742.8	£ 23.00				

## TARIFF ONE COMPARISON; PROPOSED FARES against CURRENT FARES

CURRENT FARE TARIFF 1 (£1.80 per mile)		PROPOSED FARE TARIFF 1 (£1.92 per mile)		DISTANCE TRAVELLED in WHOLE MILES	CURRENT FARE at THIS DISTANCE	PROPOSED FARE at THIS DISTANCE	PERCENT INCREASE of PROPOSED FARE
Distance in Yards	Fare at This Distance	Distance in Yards	Fare at This Distance				
				1 Mile	£ 4.40	£ 5.40	
				2 Miles	£ 6.20	£ 7.40	
				3 Miles	£ 8.00	£ 9.40	
				4 Miles	£ 9.80	£ 11.20	
				5 Miles	£ 11.60	£ 13.20	
				6 Miles	£ 13.40	£ 15.00	
				7 Miles	£ 15.20	£ 17.00	
				8 Miles	£ 17.00	£ 19.00	
				9 Miles	£ 18.80	£ 20.80	
				10 Miles	£ 20.60	£ 22.80	
PERCENTAGE INCREASE OF AGGREGATE PROPOSED FARES FROM 1 TO 10 MILES				■	£125.00	£141.20	12.96%

# TARIFF TWO COMPARISON; PROPOSED FARES against C<sub>u</sub>RRENT FARES

<u>NIGHT RATE</u> <u>Sunda' to Thursda' From</u> <u>23.00hrsto 04.00hrs !</u> <u>EVERY SUNDAY</u> <u>&amp; All Bank Holida's</u> <u>Excee. t Boxing Da' From</u> <u>04.00hrs to 23.00hrs</u>		<u>NIGHT RATE</u> <u>Sunda', to Thursda' From</u> <u>From 22.00hrs to 04.00hrs</u> <u>!</u> <u>EVERY SUNDAY</u> <u>&amp; All Bank Holida's</u> <u>Excee. t Boxing Da' From</u> <u>04.00hrs to 22.00hrs</u>		COMPARISON:  CURRENT and PROPOSED FARES  At			
CURRENT FARE TARIFF 2 (+13.3%)  (£2.04 per mile)		PROPOSED FARE TARIFF2 (+6.25%)  (£2.04 permile)		DISTANCES in WHOLE MILES			
Distance in Yards	Fare at This Distance	Distance in Yards	Fare at This Distance	DISTANCE TRAVELLED in WHOLE MILES	CURRENT FARE at THIS DISTANCE	PROPOSED FARE at THIS DISTANCE	PERCENT INCREASE of PROPOSED FARE
Flaa: 0	£ 2.40	Flaa: 0	£ 3.20				
195.6	£ 2.60	195.6	£ 3.40				
293.4	£ 2.80	293.4	£ 3.60				
391.2	£ 3.00	391.2	£ 3.80				
489.0	£ 3.20	489.0	£ 4.00				
586.8	£ 3.40	586.8	£ 4.20				
684.6	£ 3.60	684.6	£ 4.40				
857.1	£ 3.80	857.1	£ 4.60				
1029.6	£ 4.00	1029.6	£ 4.80				
1202.1	£ 4.20	1202.1	£ 5.00				
1374.6	£ 4.40	1374.6	£ 5.20				
1547.1	£ 4.60	1547.1	£ 5.40				
1719.6	£ 4.80	1719.6	£ 5.60	1 mile = 1760 Yards			
1892.1	£ 5.00	1892.1	£ 5.80	1	£ 4.80	£ 5.60	16.67%
2064.6	£ 5.20	2064.6	£ 6.00				
2237.1	£ 5.40	2237.1	£ 6.20				
2409.6	£ 5.60	2409.6	£ 6.40				
2582.1	£ 5.80	2582.1	£ 6.60				
2754.6	£ 6.00	2754.6	£ 6.80				
2927.1	£ 6.20	2927.1	£ 7.00				
3099.6	£ 6.40	3099.6	£ 7.20				
3272.1	£ 6.60	3272.1	£ 7.40	2 mile = 3520 Yards			
3444.6	£ 6.80	3444.6	£ 7.60	2	£ 6.80	£ 7.60	11.76%
3617.1	£ 7.00	3617.1	£ 7.80				
3789.6	£ 7.20	3789.6	£ 8.00				
3962.1	£ 7.40	3962.1	£ 8.20				
4134.6	£ 7.60	4134.6	£ 8.40				
4307.1	£ 7.80	4307.1	£ 8.60				
4479.6	£ 8.00	4479.6	£ 8.80				
4652.1	£ 8.20	4652.1	£ 9.00				
4824.6	£ 8.40	4824.6	£ 9.20				
4997.1	£ 8.60	4997.1	£ 9.40	3 mile = 5280 Yards			
5169.6	£ 8.80	5169.6	£ 9.60	3	£ 8.80	£ 9.60	9.09%
5342.1	£ 9.00	5342.1	£ 9.80				
5514.6	£ 9.20	5514.6	£ 10.00				
5687.1	£ 9.40	5687.1	£ 10.20				
5859.6	£ 9.60	5859.6	£ 10.40				



# TARIFF TWO COMPARISON; PROPOSED FARES against GURRENT FARES

CURRENT FARE TARIFF 2(+13.3%) £2.04 -Per mile)		PROPOSED FARE TARIFF 2 (+6.25%) (£2.04 per mile)		DISTANCE- TRAVELLED in WHOLE MILES	CURRENT FARE at THIS DISTANCE	PROPOSED FARE at THIS DISTANCE	PERCENT INCREASE of PROPOSED FARE
Distance in Yards	Fare at This Distance	Distance in Yards	Fare at This Distance				
6032.1	£ 9.80	6032.1	£ 10.60				
6204.6	£ 10.00	6204.6	£ 10.80				
6377.1	£ 10.20	6377.1	£ 11.00				
6549.6	£ 10.40	6549.6	£ 11.20				
6722.1	£ 10.60	6722.1	£ 11.40				
<b>6894.6</b>	<b>£ 10.80</b>	6894.6	£ 11.60	<b>4 mile = 7040 yards</b>			
7067.1	£ 11.00	7067.1	£ 11.80	4	£ 10.80	£ 11.60	7.41%
7239.6	£ 11.20	<b>7239.6</b>	<b>£ 12.00</b>				
7412.1	£ 11.40	7412.1	£ 12.20				
7584.6	£ 11.60	7584.6	£ 12.40				
7757.1	£ 11.80	7757.1	£ 12.60				
7929.6	£ 12.00	7929.6	£ 12.80				
8102.1	£ 12.20	8102.1	£ 13.00				
8274.6	£ 12.40	8274.6	£ 13.20				
8447.1	£ 12.60	8447.1	£ 13.40				
8619.6	£ 12.80	8619.6	£ 13.60	<b>5 mile = 8800 yards</b>			
<b>8792.1</b>	<b>£ 13.00</b>	8792.1	£ 13.80	5	£ 13.00	£ 13.80	6.15%
8964.6	£ 13.20	<b>8964.6</b>	<b>£ 14.00</b>				
9137.1	£ 13.40	9137.1	£ 14.20				
9309.6	£ 13.60	9309.6	£ 14.40				
9482.1	£ 13.80	9482.1	£ 14.60				
9654.6	£ 14.00	9654.6	£ 14.80				
9827.1	£ 14.20	9827.1	£ 15.00				
9999.6	£ 14.40	9999.6	£ 15.20				
10172.1	£ 14.60	10172.1	£ 15.40				
10344.6	£ 14.80	10344.6	£ 15.60				
<b>10517.1</b>	<b>£ 15.00</b>	10517.1	£ 15.80	<b>6 mile = 10560 yards</b>			
10689.6	£ 15.20	10689.6	£ 16.00	6	£ 15.00	£ 15.80	5.33%
10862.1	£ 15.40	<b>10862.1</b>	<b>£ 16.20</b>				
11034.6	£ 15.60	11034.6	£ 16.40				
11207.1	£ 15.80	11207.1	£ 16.60				
11379.6	£ 16.00	11379.6	£ 16.80				
11552.1	£ 16.20	11552.1	£ 17.00				
11724.6	£ 16.40	11724.6	£ 17.20				
11897.1	£ 16.60	11897.1	£ 17.40				
12069.6	£ 16.80	12069.6	£ 17.60				
<b>12242.1</b>	<b>£ 17.00</b>	12242.1	£ 17.80	<b>7 mile = 12320 yards</b>			
12414.6	£ 17.20	12414.6	£ 18.00	7	£ 17.00	£ 17.80	4.71%
12587.1	£ 17.40	<b>12587.1</b>	<b>£ 18.20</b>				
12759.6	£ 17.60	12759.6	£ 18.40				
12932.1	£ 17.80	12932.1	£ 18.60				
13104.6	£ 18.00	13104.6	£ 18.80				
13277.1	£ 18.20	13277.1	£ 19.00				
13449.6	£ 18.40	13449.6	£ 19.20				
13622.1	£ 18.60	13622.1	£ 19.40				

## TARIFF TWO COMPARISON; PROPOSED FARES against CURRENT FARES

[illegible]



## TARIFF TWO COMPARISON; PROPOSED FARES against CURRENT FARES

CURRENT FARE TARIFF 2 (+13.3%) (£2.04 per mile)		PROPOSED FARE TARIFF 2 (+6.25%) (£2.04 per mile)		DISTANCE TRAVELLED in WHOLE MILES	CURRENT FARE at THIS DISTANCE	PROPOSED FARE at THIS DISTANCE	PERCENT INCREASE of PROPOSED FARE
Distance in Yards	Fare at This Distance	Distance in Yards	Fare at This Distance				
				1 Mile	£ 4.80	£ 5.60	
				2 Miles	£ 6.80	£ 7.60	
				3 Miles	£ 8.80	£ 9.60	
				4 Miles	£ 10.80	£ 11.60	
				5 Miles	£ 13.00	£ 13.80	
				6 Miles	£ 15.00	£ 15.80	
				7 Miles	£ 17.00	£ 17.80	
				8 Miles	£ 19.00	£ 19.80	
				9 Miles	£ 21.00	£ 21.80	
				10 Miles	£ 23.20	£ 24.00	
PERCENTAGE INCREASE OF AGGREGATE PROPOSED FARES FROM 1 TO 10 MILES				■	£139.40	£147.40	5.74%

# TARIFF THREE COMPARISON; PROPOSED FARES against cURRENT FARES

<b>NIGHT RATE</b> <b><u>Frida'i and Saturda'i</u></b> <b><u>From 23.00hrs to 07.00hrs</u></b> <b><u>AND Boxing Da'i</u></b> <b><u>From 00.00hrs to 24.00hrs</u></b> <b><u>AND Christmas Eve</u></b> <b><u>AND New Year's Eve</u></b> <b><u>From 19.00hrs to 24.00hrs</u></b>		<b>NIGHT RATE</b> <b><u>Frida'i and Saturda'i From</u></b> <b><u>22.00hrs to 07.00hrs AND</u></b> <b><u>Boxing Da'i</u></b> <b><u>From 00.00hrs to 24.00hrs</u></b> <b><u>AND Christmas Eve AND</u></b> <b><u>New Year's Eve From</u></b> <b><u>18.00hrs to 24.00hrs</u></b>		<b>COMPARISON:</b>  <b>CURRENT and PROPOSED FARES</b>  <b>at</b>  <b>DISTANCES in WHOLE MILES</b>			
<b>CURRENT FARE</b> <b>TARIFF 3(+22.8%)</b> <b>(£2.21 per mile)</b>		<b>PROPOSED FARE</b> <b>TARIFF 3 (+15.1%)</b> <b>(£2.21per mile)</b>		DISTANCE TRAVELLED in WHOLE MILES	CURRENT FARE at THIS DISTANCE	PROPOSED FARE at THIS DISTANCE	PERCENT INCREASE of PROPOSED FARE
Distance in Yards	Fare at This Distance	Distance in Yards	Fare at This Distance				
<b>Flag</b>	<b>£ 2.60</b>	<b>Flag</b>	<b>£ 3.20</b>				
<b>180.5</b>	<b>£ 2.80</b>	<b>180.5</b>	<b>£ 3.40</b>				
<b>270.8</b>	<b>£ 3.00</b>	<b>270.8</b>	<b>£ 3.60</b>				
<b>361.1</b>	<b>£ 3.20</b>	<b>361.1</b>	<b>£ 3.80</b>				
<b>451.4</b>	<b>£ 3.40</b>	<b>451.4</b>	<b>£ 4.00</b>				
<b>541.7</b>	<b>£ 3.60</b>	<b>541.7</b>	<b>£ 4.20</b>				
<b>632.0</b>	<b>£ 3.80</b>	<b>632.0</b>	<b>£ 4.40</b>				
791.3	£ 4.00	791.3	£ 4.60				
950.6	£ 4.20	950.6	£ 4.80				
1109.9	£ 4.40	1109.9	£ 5.00				
1269.2	£ 4.60	1269.2	£ 5.20				
1428.5	£ 4.80	1428.5	£ 5.40	<b>1 mile = 1760 yards</b>			
1587.8	£ 5.00	1587.8	£ 5.60	1	£ 5.20	£ 5.80	<b>11.54%</b>
<b>1747.1</b>	<b>£ 5.20</b>	<b>1747.1</b>	<b>£ 5.80</b>				
1906.4	£ 5.40	1906.4	£ 6.00				
2065.7	£ 5.60	2065.7	£ 6.20				
2225.0	£ 5.80	2225.0	£ 6.40				
2384.3	£ 6.00	2384.3	£ 6.60				
2543.6	£ 6.20	2543.6	£ 6.80				
2702.9	£ 6.40	2702.9	£ 7.00				
2862.2	£ 6.60	2862.2	£ 7.20				
3021.5	£ 6.80	3021.5	£ 7.40				
3180.8	£ 7.00	3180.8	£ 7.60				
3340.1	£ 7.20	3340.1	£ 7.80	<b>2 mile = 3520 yards</b>			
<b>3499.4</b>	<b>£ 7.40</b>	<b>3499.4</b>	<b>£ 8.00</b>	2	£ 7.40	£ 8.00	<b>8.11%</b>
3658.7	£ 7.60	3658.7	£ 8.20				
3818.0	£ 7.80	3818.0	£ 8.40				
3977.3	£ 8.00	3977.3	£ 8.60				
4136.6	£ 8.20	4136.6	£ 8.80				
4295.9	£ 8.40	4295.9	£ 9.00				
4455.2	£ 8.60	4455.2	£ 9.20				
4614.5	£ 8.80	4614.5	£ 9.40				
4773.8	£ 9.00	4773.8	£ 9.60				
4933.1	£ 9.20	4933.1	£ 9.80				
5092.4	£ 9.40	5092.4	£ 10.00	<b>3 mile = 5280 yards</b>			
<b>5251.7</b>	<b>£ 9.60</b>	<b>5251.7</b>	<b>£ 10.20</b>	3	£ 9.60	£ 10.20	<b>6.254/o</b>
5411.0	£ 9.80	5411.0	£ 10.40				



# TARIFF THREE COMPARISON; PROPOSED FARES against CURRENT FARES

CURRENT FARE TARIFF 3 (+22.8%) (£2.21 per mile)		PROPOSED FARE TARIFF 3 (+15.1%) (£2.21 per mile)		DISTANCE TRAVELLED in WHOLE MILES	CURRENT FARE at THIS DISTANCE	PROPOSED FARE at THIS DISTANCE	PERCENT INCREASE of PROPOSED FARE
Distance in Yards	Fare at This Distance	Distance in Yards	Fare at This Distance				
5570.3	£ 10.00	5570.3	£ 10.60				
5729.6	£ 10.20	5729.6	£ 10.80				
5888.9	£ 10.40	5888.9	£ 11.00				
6048.2	£ 10.60	6048.2	£ 11.20				
6207.5	£ 10.80	6207.5	£ 11.40				
6366.8	£ 11.00	6366.8	£ 11.60				
6526.1	£ 11.20	6526.1	£ 11.80				
6685.4	£ 11.40	6685.4	£ 12.00				
6844.7	£ 11.60	6844.7	£ 12.20				
<b>7004.0</b>	<b>£ 11.80</b>	7004.0	£ 12.40	<b>4mile = 7040 yards</b>			
7163.3	£ 12.00	7163.3	£ 12.60	<b>4</b>	£ 11.80	£ 12.40	<b>5.08%</b>
7322.6	£ 12.20	<b>7322.6</b>	<b>£ 12.80</b>				
7481.9	£ 12.40	7481.9	£ 13.00				
7641.2	£ 12.60	7641.2	£ 13.20				
7800.5	£ 12.80	7800.5	£ 13.40				
7959.8	£ 13.00	7959.8	£ 13.60				
8119.1	£ 13.20	8119.1	£ 13.80				
8278.4	£ 13.40	8278.4	£ 14.00				
8437.7	£ 13.60	8437.7	£ 14.20				
8597.0	£ 13.80	8597.0	£ 14.40				
<b>8756.3</b>	<b>£ 14.00</b>	8756.3	£ 14.60	<b>5mile = 8800 yards</b>			
8915.6	£ 14.20	8915.6	£ 14.80	<b>5</b>	£ 14.00	£ 14.60	<b>4.29%</b>
9074.9	£ 14.40	<b>9074.9</b>	<b>£ 15.00</b>				
9234.2	£ 14.60	9234.2	£ 15.20				
9393.5	£ 14.80	9393.5	£ 15.40				
9552.8	£ 15.00	9552.8	£ 15.60				
9712.1	£ 15.20	9712.1	£ 15.80				
9871.4	£ 15.40	9871.4	£ 16.00				
10030.7	£ 15.60	10030.7	£ 16.20				
10190.0	£ 15.80	10190.0	£ 16.40				
10349.3	£ 16.00	10349.3	£ 16.60				
<b>10508.6</b>	<b>£ 16.20</b>	10508.6	£ 16.80	<b>6mile = 10560 yards</b>			
10667.9	£ 16.40	10667.9	£ 17.00	<b>6</b>	£ 16.20	£ 16.80	<b>3.70%</b>
10827.2	£ 16.60	<b>10827.2</b>	<b>£ 17.20</b>				
10986.5	£ 16.80	10986.5	£ 17.40				
11145.8	£ 17.00	11145.8	£ 17.60				
11305.1	£ 17.20	11305.1	£ 17.80				
11464.4	£ 17.40	11464.4	£ 18.00				
11623.7	£ 17.60	11623.7	£ 18.20				
11783.0	£ 17.80	11783.0	£ 18.40				
11942.3	£ 18.00	11942.3	£ 18.60				
12101.6	£ 18.20	12101.6	£ 18.80				
<b>12260.9</b>	<b>£ 18.40</b>	12260.9	£ 19.00	<b>7mile = 12320 yards</b>			
12420.2	£ 18.60	12420.2	£ 19.20	<b>7</b>	£ 18.40	£ 19.00	<b>3.26%</b>
12579.5	£ 18.80	12579.5	£ 19.40				
12738.8	£ 19.00	<b>12738.8</b>	<b>£ 19.60</b>				

## TARIFF THREE COMPARISON; PROPOSED FARES against CURRENT FARES

[illegible]



# TARIFF THREE COMPARISON; PROPOSED FARES against CURRENT FARES

CURRENT FARE TARIFF 3 {+22.8%} (£2.21 per mile)		PROPOSED FARE TARIFF 3 (+15.1%) (£2.21 per mile)		DISTANCE TRAVELLED in WHOLE MILES	CURRENT FARE at THIS DISTANCE	PROPOSED FARE at THIS DISTANCE	PERCENT INCREASE of PROPOSED FARE
Distance in Yards	Fare at This Distance	Distance in Yards	Fare at This Distance				
				1 Mile	£ 5.20	£ 5.80	
				2 Miles	£ 7.40	£ 8.00	
				3 Miles	£ 9.60	£ 10.20	
				4 Miles	£ 11.80	£ 12.40	
				5 Miles	£ 14.00	£ 14.60	
				6 Miles	£ 16.20	£ 16.80	
				7 Miles	£ 18.40	£ 19.00	
				8 Miles	£ 20.60	£ 21.20	
				9 Miles	£ 22.80	£ 23.40	
				10 Miles	£ 25.00	£ 25.60	
PERCENTAGE INCREASE OF AGGREGATE PROPOSED FARES FROM 1 TO 10 MILES				=	£151.00	£157.0	3.97%

# TARIFF 4 COMPARISON; PROPOSED FARES against CURRENT FARES

CHRISTMAS DAY & NEW YEAR'S DAY Christmas Da'l); From 00.00hrs to 24.00hrs New Year's Da'l); From 00.00hrs to 07.00hrs		CHRISTMAS DAY & NEW YEAR'S DAY Christmas Da'l); From 00.00hrs to 24.00hrs New Year's Da'l); From 00.00hrs to 07.00hrs		COMPARISON CURRENT & PROPOSED FARES at DISTANCES in WHOLE MILES			
CURRENT FARE TARIFF 4 (+51.1%) £2.72 per mne		PROPOSED FARE TARIFF 4 (+56.2%) £3.00 per mile		DISTANCE TRAVELLED in WHOLE MILES	CURRENT FARE at THIS DISTANCE	PROPOSED FARE at THIS DISTANCE	PERCENT INCREASE of PROPOSED FARE
Distance in Yards	Fare at This Distance	Distance in Yards	Fare at This Distance				
<b>Flag: 0</b>	£ 3.00	<b>Flag: 0</b>	£ 4.20				
220.0	£ 3.30	220.0	£ 4.50				
330.0	£ 3.60	330.0	£ 4.80				
440.0	£ 3.90	440.0	£ 5.10				
550.0	£ 4.20	550.0	£ 5.40				
660.0	£ 4.50	660.0	£ 5.70				
770.0	£ 4.80	770.0	£ 6.00				
964.1	£ 5.10	964.0	£ 6.30				
1158.2	£ 5.40	1122.0	£ 6.60				
1352.3	£ 5.70	1298.0	£ 6.90				
1546.4	£ 6.00	1474.0	£ 7.20				
<b>1740.5</b>	£ <b>6.30</b>	<b>1650.0</b>	£ 7.50	<b>1 mile = 1760 yards</b>			
1934.6	£ 6.60	1826.0	£ 7.80	1	£ 6.30	£ 7.50	19.05%
2128.7	£ 6.90	2002.0	£ 8.10				
2322.8	£ 7.20	2178.0	£ 8.40				
2516.9	£ 7.50	2354.0	£ 8.70				
2711.0	£ 7.80	2530.0	£ 9.00				
2905.1	£ 8.10	2706.0	£ 9.30				
3099.2	£ 8.40	2882.0	£ 9.60				
3293.3	£ 8.70	3058.0	£ 9.90				
<b>3487.4</b>	£ <b>9.00</b>	<b>3234.0</b>	£ 10.20	<b>2 mile = 3520 yards</b>			
3681.5	£ 9.30	3410.0	£ 10.50	2	£ 9.00	£ 10.50	16.67%
3875.6	£ 9.60	3586.0	£ 10.80				
4069.7	£ 9.90	3762.0	£ 11.10				
4263.8	£ 10.20	3938.0	£ 11.40				
4457.9	£ 10.50	4114.0	£ 11.70				
4652.0	£ 10.80	4290.0	£ 12.00				
4846.1	£ 11.10	4466.0	£ 12.30				
5040.2	£ 11.40	4642.0	£ 12.60				
<b>5234.3</b>	£ <b>11.70</b>	<b>4818.0</b>	£ 12.90	<b>3 mile = 5280 yards</b>			
5428.4	£ 12.00	4994.0	£ 13.20	3	£ 11.70	£ 13.50	15.38%
5622.5	£ 12.30	5170.0	£ 13.50				
5816.6	£ 12.60	5346.0	£ 13.80				
6010.7	£ 12.90	5522.0	£ 14.10				
6204.8	£ 13.20	5698.0	£ 14.40				



# NO CHANGE TARIFF 4 CURRENT FARES

CURRENT FARE TARIFF 4 (+51.1%) £2;72 per mile		PROPOSED FARE TARIFF 4 (+56.2%) £3.00 per mile		DISTANCE TRAVELLED in WHOLE MILES	CURRENT FARE at THIS DISTANCE		PERCENT INCREASE of PROPOSED FARE
Distance in Yards	Fare at This Distance	Distance in Yards	Fare at This Distance				
6398.9	£ 13.50	5874.0	£ 14.70				
6593.0	£ 13.80	6050.0	£ 15.00				
6787.1	£ 14.10	6226.0	£ 15.30				
<b>6981.2</b>	<b>£ 14.40</b>	6402.0	£ 15.60	<b>4 mile = 7040 yards</b>			
7175.3	£ 14.70	6578.0	£ 15.90	<b>4</b>	£ 14.40	£ 16.50	<b>14.58%</b>
7369.4	£ 15.00	6754.0	£ 16.20				
7563.5	£ 15.30	6930.0	£ 16.50				
7757.6	£ 15.60	7106.0	£ 16.80				
7951.7	£ 15.90	7282.0	£ 17.10				
8145.8	£ 16.20	7458.0	£ 17.40				
8339.9	£ 16.50	7634.0	£ 17.70				
8534.0	£ 16.80	7810.0	£ 18.00				
<b>8728.1</b>	<b>£ 17.10</b>	7986.0	£ 18.30	<b>5 mile = 8800 yards</b>			
8922.2	£ 17.40	8162.0	£ 18.60	<b>5</b>	£ 17.10	£ 19.50	<b>14.04%</b>
9116.3	£ 17.70	8338.0	£ 18.90				
9310.4	£ 18.00	8514.0	£ 19.20				
9504.5	£ 18.30	8690.0	£ 19.50				
9698.6	£ 18.60	8866.0	£ 19.80				
9892.7	£ 18.90	9042.0	£ 20.10				
10086.8	£ 19.20	9218.0	£ 20.40				
10280.9	£ 19.50	9394.0	£ 20.70				
<b>10475.0</b>	<b>£ 19.80</b>	9570.0	£ 21.00	<b>6 mile = 10560 yards</b>			
10669.1	£ 20.10	9746.0	£ 21.30	<b>6</b>	£ 19.80	£ 22.50	<b>13.64%</b>
10863.2	£ 20.40	9922.0	£ 21.60				
11057.3	£ 20.70	10098.0	£ 21.90				
11251.4	£ 21.00	10274.0	£ 22.20				
11445.5	£ 21.30	10450.0	£ 22.50				
11639.6	£ 21.60	10626.0	£ 22.80				
11833.7	£ 21.90	10802.0	£ 23.10				
12027.8	£ 22.20	10978.0	£ 23.40				
<b>12221.9</b>	<b>£ 22.50</b>	11154.0	£ 23.70	<b>7 mile = 12320 yards</b>			
12416.0	£ 22.80	11330.0	£ 24.00	<b>7</b>	£ 22.50	£ 25.50	<b>13.33%</b>
12610.1	£ 23.10	11506.0	£ 24.30				
12804.2	£ 23.40	11682.0	£ 24.60				
12998.3	£ 23.70	11858.0	£ 24.90				
13192.4	£ 24.00	12034.0	£ 25.20				
13386.5	£ 24.30	12210.0	£ 25.50				
13580.6	£ 24.60	12386.0	£ 25.80				
13774.7	£ 24.90	12562.0	£ 26.10				
<b>13968.8</b>	<b>£ 25.20</b>	12738.0	£ 26.40	<b>8 mile = 14080-yards</b>			
14162.9	£ 25.50	12914.0	£ 26.70	<b>8</b>	£ 25.20	£ 28.50	<b>13.10%</b>
14357.0	£ 25.80	13090.0	£ 27.00				
14551.1	£ 26.10	13266.0	£ 27.30				
14745.2	£ 26.40	13442.0	£ 27.60				

# TARIFF FOUR COMPARISON; PROPOSED FARE against CURRENT FARES

CURRENT FARE TARIFF 4 (+51.1%) £2.72 per mile		PROPOSED FARE TARIFF 4 (+56.2%) £3.00 per mile		DISTANCE TRAVELLED in WHOLE MILES	CURRENT FARE at THIS DISTANCE		PERCENT INCREASE of PROPOSED FARE
Distance in Yards	Fare at This Distance	Distance in Yards	Fare at This Distance				
14939.3	£ 26.70	13618.0	£ 27.90				
15133.4	£ 27.00	13794.0	£ 28.20				
15327.5	£ 27.30	13970.0	£ 28.50				
15521.6	£ 27.60	14146.0	£ 28.80				
<b>15715.7</b>	<b>£ 27.90</b>	14322.0	£ 29.10				
15909.8	£ 28.20	14498.0	£ 29.40				
16103.9	£ 28.50	14674.0	£ 29.70	<b>9 mile = 15840 yards</b>			
16298.0	£ 28.80	14850.0	£ 30.00	9	£ 27.90	£ 31.50	12.90%
16492.1	£ 29.10	15026.0	£ 30.30				
16686.2	£ 29.40	15202.0	£ 30.60				
16880.3	£ 29.70	15378.0	£ 30.90				
17074.4	£ 30.00	15554.0	£ 31.20				
17268.5	£ 30.30	15730.0	£ 31.50				
<b>17462.6</b>	<b>£ 30.60</b>	15906.0	£ 31.80				
17656.7	£ 30.90	16082.0	£ 32.10				
17850.8	£ 31.20	16258.0	£ 32.40	<b>10 mile = 17600 yards</b>			
		16434.0	£ 32.70	10	£ 30.60	£ 34.50	12.75%
		16610.0	£ 33.00				
		16786.0	£ 33.30				
		16962.0	£ 33.60				
		17138.0	£ 33.90				
		17314.0	£ 34.20				
		17490.0	£ 34.50				
		17666.0	£ 34.80				

## NO CHANGE TARIFF 4 CURRENT FARES

[illegible]



# TIME CHANGES FOR CURRENT TARIFF ONE ONLY

<b>CURRENT TARIFFS</b>	<b>UNIT PRICE CHARGE</b>	<b>TIME IN SECONDS PER UNIT</b>	<b>EQUIVALENT HOURLY RATE</b>
<b>CURRENT TARIFF ONE; INCREASE</b> <b>DAY RATE;</b> (Monday to Saturday from 07.00hrs to 23.00hrs excluding those days & times as in Tariffs Two, Three and Four)	<b>20 pence</b>	<b>42.8 secs</b>	<b>£16.82</b>
<b>TARIFF TWO; NO CHANGE</b> <b>NIGHT RATE;</b> (Sunday to Thursday from 23.00hrs to 04.00hrs AND Every Sunday & All Bank Holidays except Boxing Day from 07.00hrs to 23.00hrs)	<b>20 pence</b>	<b>40.0 secs</b>	<b>£18.00</b>
<b>TARIFF THREE; NO CHANGE</b> <b>NIGHT RATE;</b> (Friday and Saturday from 23.00hrs to 07.00hrs AND Boxing Day from 00.01hrs to 24.00hrs AND Christmas Eve & New Year's Eve from 19.00hrs to 24.00hrs)	<b>20 pence</b>	<b>36.9 secs</b>	<b>£19.50</b>
<b>TARIFF FOUR; NO CHANGE</b> <b>CHRISTMAS and NEW YEAR RATE</b> (Christmas Day from 00.01hrs to 24.00hrs AND New Year's Day from 00.01hrs to 07.00hrs)	<b>30 pence</b>	<b>45.0 secs</b>	<b>£24.00</b>



## APPENDIX 5

# BIRMINGHAM CITY COUNCIL HACKNEY CARRIAGE - TABLE of FARES

**If you fail to pay the fare recorded on the taximeter, you may be liable under The Theft Act 1968, on conviction, to a sentence of imprisonment of up to 10 years.**

The taximeter is programmed to select the correct tariff automatically, from the tariffs as detailed below, depending on the date, day and time of day that the Hackney Carriage is being hired using real time clock tariff changes in hired mode.

<b>TARIFF ONE: STANDARD DAY RATE</b> Applicable Monday to Saturday From 07.00hrs to 23.00hrs (EXCEPT for those days and times as specified in Tariffs Two, Three and Four)	<b>TARIFF TWO: WEEKDAY NIGHT RATE</b> Applicable Sunday to Thursday - From 23.00hrs to 04.00hrs the next day AND on Sunday - From 07.00hrs to 23.00hrs AND All Bank Holidays - From 00.00hrs to 23.00hrs. (EXCEPT for those days and times as specified in Tariffs Three & Four)
<b>TARIFF THREE: WEEKEND NIGHT RATE</b> Applicable Friday and Saturday - From 23.00hrs to 07.00hrs the next day AND on Boxing Day - From 00.00hrs to 24.00hrs AND on Christmas Eve - From 19.00hrs to 24.00hrs AND on New Year's Eve - From 19.00hrs to 24.00hrs	<b>TARIFF FOUR: CHRISTMAS &amp; NEW YEAR SEASON</b> Applicable on Christmas Day and New Year's Day On Christmas Day - From 00.00hrs to 24.00hrs <p style="text-align: center;">A N D</p> On New Year's Day - From 00.00hrs to 07.00hrs

The fare is shown on the taximeter, which records on the basis of time or distance at the following rates.

	<b>TARIFF ONE</b>	<b>TARIFF TWO</b>	<b>TARIFF THREE</b>	<b>TARIFF FOUR</b>
<b>INITIAL CHARGES:</b> A charge of For the first or part thereof	£2.20 187.5 yards	£2.40 195.6 yards	£2.60 180.5 yards	£3.00 220 yards
<b>MILEAGE CHARGES:</b> A charge of For each subsequent or part thereof until have been travelled.	20p 125.0 yards 1062.5 yards	20p 97.8 yards 684.6 yards	20p 90.3 yards 632 yards	30p 110 yards 770 yards
<b>Thereafter:</b> A charge of For each subsequent or part thereof Equivalent to a rate per mile of	20p 195.6 yards £1.80	20p 172.5 yards £2.04	20p 159.3 yards £2.21	30p 194.1 yards £2.72
<b>WAITING &amp; TIME CHARGES:</b> A charge of For each or part thereof Equivalent to an hourly rate of	20p 45.8 secs £15.72	20p 40.0 secs £18.00	20p 36.9 secs £19.50	30p 45.0 secs £24.00
<b>SOILAGE CHARGES:</b> An additional charge may be made in the event of <b>SOILAGE OR FOULING OF THE VEHICLE</b>	£40.00	£40.00	£40.00	£60.00

**EXTRA CHARGES:**

For every person in excess of one

20p

For every article of luggage carried outside the passenger compartment

20p

Any road toll or barrier charge incurred in the execution of the hiring

## COMPLAINTS

Any complaint of overcharging, or about this taxi or taxi driver, should be sent in writing to The Enforcement Section, Birmingham City Council, Unit 1-3 Ashted Lock, Darthmouth Middleway, Birmingham B7 4AZ, or by telephoning 0121 303 9611, quoting the number of the taxi and the number of the driver's badge. Enquiries regarding property accidentally left in a taxi should be made at the nearest West Midlands Police Station.

# H0

JUNE 2012



## APPENDIX 6

Title of proposed EIA	Hackney Carriage Proposed Maximum Fare Tariff
Reference No	EQUA944
EA is in support of	New Policy
Review Frequency	Two Years
Date of first review	01/01/2024
Directorate	City Operations
Division	Regulation and Enforcement
Service Area	Licensing
Responsible Officer(s)	<input type="checkbox"/> Sajeela Naseer
Quality Control Officer(s)	<input type="checkbox"/> Leroy Pearce
Accountable Officer(s)	<input type="checkbox"/> Paul Lankester
Purpose of proposal	Review of Hackney Carriage Maximum Fare Tariff
Data sources	Other (please specify)
Please include any other sources of data	Private Hire and Taxi Monthly Fare table
ASSESS THE IMPACT AGAINST THE PROTECTED CHARACTERISTICS	
Protected characteristic: Age	Not Applicable
Age details:	Any proposed maximum fare tariff will impact on all users of hackney carriages and not disproportionately affect this protected characteristic.
Protected characteristic: Disability	Service Users / Stakeholders
Disability details:	People with disabilities are likely to be negatively impacted by an increase in the maximum fare tariff for hackney carriages. This is because these vehicles can accommodate wheel chairs and people with limited movement or special equipment. However a balance has to be reached when meeting trade requests for an increased fare tariff as a too low tariff will result in drivers leaving the market and hence the service not being provided. Too high a fare tariff may result in customers with disabilities not being able to use the service due to increased costs.
	On balance it is believed the proposal will ensure there is greater service availability with less hackney carriages being withdrawn from the market due to lack of economic viability. This is of greater significance than the increase in price of the tariff, even though this is a negative aspect to the proposal for disabled persons who rely on taxi services.
Protected characteristic: Sex	Service Users / Stakeholders
Gender details:	Any proposed maximum fare tariff will impact on all users of hackney carriages and not disproportionately affect this protected characteristic.
Protected characteristics: Gender Reassignment	Not Applicable
Gender reassignment details:	Any proposed maximum fare tariff will impact on all users of hackney carriages and not disproportionately affect this protected characteristic.

Protected characteristics: Marriage and Civil Partnership	Not Applicable
Marriage and civil partnership details:	Any proposed maximum fare tariff will impact on all users of hackney carriages and not disproportionately affect this protected characteristic.
Protected characteristics: Pregnancy and Maternity	Not Applicable
Pregnancy and maternity details:	Any proposed maximum fare tariff will impact on all users of hackney carriages and not disproportionately affect this protected characteristic.
Protected characteristics: Race	Not Applicable
Race details:	Any proposed maximum fare tariff will impact on all users of hackney carriages and not disproportionately affect this protected characteristic.
Protected characteristics: Religion or Beliefs	Not Applicable
Religion or beliefs details:	Any proposed maximum fare tariff will impact on all users of hackney carriages and not disproportionately affect this protected characteristic.
Protected characteristics: Sexual Orientation	Not Applicable
Sexual orientation details:	Any proposed maximum fare tariff will impact on all users of hackney carriages and not disproportionately affect this protected characteristic.
Socio-economic impacts	Any proposed maximum fare tariff will impact on all users of hackney carriages and may disproportionately affect people on lower incomes, however this is offset by a competitive market in the private hire trade which can be utilised for travel.
Please indicate any actions arising from completing this screening exercise.	It has been identified that people with disabilities may be disproportionately affected by an increase in the maximum fare tariff. We will need to consider feedback during the consultation period to establish if any amendments should be made to the fare increase proposal.
Please indicate whether a full impact assessment is recommended	NO
What data has been collected to facilitate the assessment of this policy/proposal?	CPI, RPI, England Fare Table (Private Hire and Taxi Monthly)
Consultation analysis	<p>To be conducted. 14 day statutory consultation to commence after Cabinet approval of proposed Maximum Fare Tariff</p> <p>We have had representations from the RMT, TOA and a 230 driver petition asking for an increase in the maximum fare tariff.</p>
Adverse impact on any people with protected characteristics.	It has been identified that people with disabilities may be disproportionately affected by an increase in the maximum fare tariff. We will need to consider feedback during the consultation period to establish if any amendments should be made to the fare increase proposal.



Could the policy/proposal be modified to reduce or eliminate any adverse impact?	No. Making no change to the current max fare tariff or increasing it only slightly is likely to lead to an exodus of hackney carriage drivers from the market as it is not profitable to continue. Hackney carriage numbers have already declined by about a third in the last 10 years.
How will the effect(s) of this policy/proposal on equality be monitored?	We will consider the feedback during the consultation period and monitor the number of available hackney carriages and feedback from customers.
What data is required in the future?	Number of hackney carriage vehicles licensed
Are there any adverse impacts on any particular group(s)	Yes
If yes, please explain your reasons for going ahead.	Making no change to the current max. fare tariff or increasing it only slightly is likely to lead to an exodus of hackney carriage drivers from the market as it is not profitable to continue. Hackney carriage numbers have already declined by about a third in the last 10 years. A lack of vehicles will impact on availability for all customers including the disabled.
Initial equality impact assessment of your proposal	<p>Subject to consultation results there is no need to carry out a further assessment. Please note the paragraph below that I have added to the disability impact assessment.</p> <p><i>On balance it is believed the proposal will ensure there is greater service availability with less hackney carriages being withdrawn from the market due to lack of economic viability. This is of greater significance than the increase in price of the tariff, even though this is a negative aspect to the proposal for disabled persons who rely on taxi services.</i></p>
Consulted People or Groups	
Informed People or Groups	
Summary and evidence of findings from your EIA	<p>It has been identified that people with disabilities may be disproportionately affected by an increase in the maximum fare tariff. We will need to consider feedback during the consultation period to establish if any amendments should be made to the fare increase proposal.</p> <p>Making no change to the current max. fare tariff or increasing it only slightly is likely to lead to an exodus of hackney carriage drivers from the market as it is not profitable to continue. Hackney carriage numbers have already declined by about a third in the last 10 years. A lack of vehicles will impact on availability for all customers including the disabled.</p> <p>Added by Paul Lankester- <i>On balance it is believed the proposal will ensure there is greater service availability with less hackney carriages being withdrawn from the market due to lack of economic viability. This is of greater significance than the increase in price of the tariff, even though this is a</i></p>

*negative aspect to the proposal for disabled persons who rely on taxi services.*

#### QUALITY CONTROL SECTION

Submit to the Quality Control Officer for reviewing?

Yes

Quality Control Officer comments

People with disabilities have been identified and considered as likely to be impacted by this tariff increase. Please update this EIA once any relevant consultation data has been obtained.

Decision by Quality Control Officer

Proceed for final approval

Submit draft to Accountable Officer?

Yes

Decision by Accountable Officer

Approve

Date approved / rejected by the Accountable Officer

13/07/2022

Reasons for approval or rejection

The assessment is thorough and covers all aspects. I have added the following paragraph in appropriate places for this assessment;

"On balance it is believed the proposal will ensure there is greater service availability with less hackney carriages being withdrawn from the market due to lack of economic viability. This is of greater significance than the increase in price of the tariff, even though this is a negative aspect to the proposal for disabled persons who rely on taxi services."

Please print and save a PDF copy for your records

Yes

Content Type: Item

Version: 21.0

Created at 06/07/2022 05:43 PM by ☐ Sajeela Naseer

Last modified at 13/07/2022 03:31 PM by Workflow on behalf of ☐ Paul Lankester

Close

**Reports not on the Forward Plan / Late Report / Confidential or  
Exempt Information not Notified**

## **Birmingham City Council**

**Cabinet 26 July 2022**



**Subject:** Kings Heath and Ladywood Community Centres – Boiler Replacement

**Report of:** Rob James, Strategic Director

**Report author:** Lesley Poulton, Head of Service

### **1) Key Decisions not on the Forward Plan / Urgent Decisions**

To be completed for Key Decisions not on the Forward Plan 28 days before the Cabinet meeting at which the decision is to be taken.

<i>Reasons for Urgency / why not included on the notification</i>	Boilers providing all the heating and hot water have failed at two community centres and need to be replaced as soon as possible to avoid monthly temporary boiler hire charges; to avoid inflation impacting on the cost of the work in the intervening period; and to allow the replacement boilers to be installed before winter.
<i>Date Chief Executive Agreement obtained:</i>	12.07.22
<i>Name, Date and any comments of O&amp;S Chair agreement obtained:</i>	Councillor Mohammed Idrees, Housing & Neighbourhoods – 12.07.22 Councillor Akhlaq Ahmed, Resources – 15.07.22

### **2) Key Decisions not notified on the Notification of Intention to Consider Matters in Private**

To be completed for Key Decisions not on the Forward Plan 28 days before the Cabinet meeting at which the decision is to be taken.

<i>Reasons for Urgency / why not included on the notification</i>	Boilers providing all the heating and hot water have failed at two community centres and need to be replaced as soon as possible to avoid monthly temporary boiler hire charges; to avoid inflation impacting on the cost of the work in the intervening period; and to allow the replacement boilers to be installed before winter.
<i>Name, Date and any comments of O&amp;S Chair agreement obtained:</i>	Councillor Mohammed Idrees, Housing & Neighbourhoods – 15.07.22

	Councillor Akhlaq Ahmed, Resources – 15.07.22
--	-----------------------------------------------



### 3) Late Reports

To be completed for all late reports, i.e. which cannot be despatched with the agenda papers i.e. 5 clear working days' notice before meeting.

<i>Reasons for Urgency / why late</i>	[insert reasons]
<i>Date agreement obtained (Executive e.g. Leader and/or CEX):</i>	



# Birmingham City Council

## Report to Cabinet

26 July 2022



**Subject:** Kings Heath and Ladywood Community Centres – Replacement Boilers - Full Business Case and Contract Award

**Report of:** Rob James ,Strategic Director, City Operations

**Relevant Cabinet Member:** Councillor Ian Ward, Leader  
Councillor Yvonne Mosquito, Finance and Resources

**Relevant O&S Chair(s):** Councillor Mohammed Idrees, Housing & Neighbourhoods  
Councillor Akhlaq Ahmed, Resources

**Report author:** Lesley Poulton, Neighbourhoods Division, City Operations Directorate  
[lesley.poulton@birmingham.gov.uk](mailto:lesley.poulton@birmingham.gov.uk)

Are specific wards affected?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No – All wards affected
If yes, name(s) of ward(s): Ladywood; Brandwood & Kings Heath		
Is this a key decision?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No
If relevant, add Forward Plan Reference: 010361/2022		
Is the decision eligible for call-in?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No
Does the report contain confidential or exempt information?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No
If relevant, provide exempt information paragraph number or reason if confidential : Information relating to the financial or business affairs of any particular person (including the authority holding that information – Appendix 7		

### 1 Executive Summary

- 1.1 The purpose of this report is to seek approval to the use of Corporate Capital Contingency budget resources of £593,650 to replace the boiler systems that provide heating and hot water at Ladywood Health & Community Centre (HCC) and

Kings Heath Community Centre (CC), as set out in the Full Business Case attached at Appendix 1.

- 1.2 The report details the procurement process undertaken for the new boiler systems and the recommendations for the award of contracts to enable the works to commence.

## **2 Recommendations**

That Cabinet :

- 2.1 Approves the Full Business Case (FBC) in Appendix 1 for the replacement of the boiler systems at Ladywood H&CC and Kings Heath CC at a project cost of £593,650 including fees and contingency provisions.
- 2.2 Authorises the Director of Council Management to set aside a capital sum of up to £593,650 from the Corporate Capital Contingency budget to fund the replacement boiler systems at Ladywood H&CC and Kings Heath CC.
- 2.3 Approves the award of a contract for the delivery of the replacement boiler system at Ladywood Health & Community Centre to Dodd Group (Midlands) Ltd.
- 2.4 Approves the award of a contract for the delivery of the replacement boiler system at Kings Heath Community Centre to Dodd Group (Midlands) Ltd.
- 2.5 Authorises the Interim City Solicitor and Monitoring Officer to negotiate, execute and complete all necessary documents to give effect to the above recommendations.

## **3 Background**

- 3.1 Kings Heath Community Centre is a well-used facility located on Heathfield Road, just off Kings Heath High Street. Ladywood Health and Community Centre is a large multi-storey facility built with capital investment from the NHS and is subject to a long-term legal agreement regarding respective rights and responsibilities for the property. It is also well used by a range of groups and hosts a formal tenancy of a nursery.
- 3.2 The facilities are used as corporate resources and hosted Covid 19 Lateral Flow and PCR testing stations, surge testing teams and mobile vaccination units during the pandemic. The Centres are used on an on-going basis by the Council and its partners for a range of purposes including, for example, polling stations, postal vote counts, police training, youth activity days and so on.



- 3.3 At both sites the boilers supplying hot water and heating have failed completely and they have been assessed as obsolete and beyond repair. As an emergency interim measure, in order to keep the Centres operational, temporary boilers have been installed on a monthly hire agreement but these are proving costly to run.
- 3.4 The project is to undertake a replacement of the boiler systems with high energy efficiency models.
- 3.5 The project will :
- relieve an unfunded budget pressure associated with the hire of temporary boilers;
  - improve energy efficiency and reduce carbon emissions;
  - allow the Centres to remain open to enable the local community to continue to access the social and health benefits of regular community activities;
- 3.6 Due to the urgent need for the replacement boiler systems the project has moved straight to Full Business Case, supported by an Options Appraisal.

#### **4 Options considered and Recommended Proposal**

A full options appraisal has been appended to this report (Appendix 1 A).

##### **4.1 Option 1 – Replace the boiler systems at Kings Heath and Ladywood Community Centres (recommended)**

This is the only option that will allow the Centres to keep functioning in the longer term and is a more cost-effective solution than the on-going using of temporary boilers for which the service is paying hire of c£80,000 per year, in addition to fuel charges.

##### **4.2 Option 2 – Continue with temporary boilers**

Temporary boilers are being hired as a short-term emergency measure in order that the Centres can continue to open to the public. However, the hire charges amount to an estimated £80,000 per year which is creating a budget pressure for the service. The hire costs are being met on a temporary basis by deferring expenditure in other areas of service and therefore this solution cannot be sustained indefinitely. Therefore, this option was discounted.

##### **4.3 Option 3 – Repair the existing boiler systems**

Following inspection, Acivico Ltd have advised that the boiler systems are obsolete and are beyond economic repair and that, at best, repairs would offer only a short-term solution as other parts of the system could fail at any time. This option was therefore discounted.

## 5 Consultation

- 5.1 The Ladywood and Brandwood & Kings Heath Ward Councillors have been consulted and are fully supportive of the proposal.
- 5.2 The Full Business Case (FBC) was presented to Capital Board on 07.07.22 and the proposal was supported.

## 6 Risk Management

A risk register is included in the FBC (Appendix 1). The main risks identified are :

- 6.1 Additional costs during the construction period due to increased labour and/or materials costs  
**Mitigation:** This is a fixed price contract with a contingency built in for unforeseen circumstances. Costs will be managed by Acivico Ltd within the budget provision
- 6.2 Unforeseen additional works may arise during the installation of the boiler systems, creating an additional funding requirement.  
**Mitigation:** The overall cost of the projects includes a contingency to account for any unforeseen circumstances which may occur during the construction period.
- 6.3 Work not completed on time in accordance with the agreed programme  
**Mitigation:** The contractor will work to an agreed programme of scheduled activities that will be reviewed at each progress meeting. For each scheme, slippage of activities will be highlighted at an early stage and activities rescheduled/adjusted to mitigate any delays to meet the critical path milestones.

## 7 Compliance Issues:

- 7.1 **How are the recommended decisions consistent with the City Council's priorities, plans and strategies?**  
The proposal supports the Birmingham City Council Plan 2018-2022 (as updated in 2019) by contributing to the Council's Key Priorities, specifically :
  - 7.1.1 **Priority 1 Birmingham is an entrepreneurial city to learn, work and invest in;**  
The Centres host after school and nursery provision which supports parents to access employment and training opportunities. Specific welfare, family, food and debt support are also on offer.
  - 7.1.2 **Priority 2 Birmingham is an aspirational city to grow up in;**  
The Centres also host sessions for pre-school children, older children and young people. These activities help develop younger children's social skills, enabling them to be more ready to start school; and the youth club and theatre group give

young people the chance to meet new friends and develop life skills which assists their personal development, supports their wellbeing, and enables them to take advantage of future learning and job opportunities.

**7.1.3 Priority 3 Birmingham is a fulfilling city to age well in;**

The Centres are local hubs for the community and residents of all ages but run activities specifically aimed at older people such as senior citizens' social clubs. These activities help break down social isolation, encourage residents to feel part of the community and enable them to remain physically active and mentally alert.

**7.1.4 Priority 4 Birmingham is a great clean and green city to live in;**

The Centres are part of the network of hubs across the City that serve a vital function in communities, giving people the opportunity to have fun, socialise, learn, exercise and access key support services. Community and voluntary groups do incredible work to bring people together and to support individuals in difficult circumstances. Post pandemic, this support has assumed an even greater significance and facilities such as Kings Heath CC and Ladywood H&CC are key to community recovery, providing food, welfare and debt support.

**7.1.5 Priority 6 Birmingham is a city that takes a leading role in tackling climate change;**

Replacing the boilers with more modern energy efficient models will make the buildings more energy efficient and reduce carbon emissions.

**7.1.6 The proposal also supports the Property Strategy 2018/19 – 2023/24 by putting forward a solution whereby the life of existing buildings can be extended.**

**7.1.7 Birmingham Business Charter for Social Responsibility (BBC4SR)**

The value of this contract is below the works threshold for the BBC4SR to apply. However, the Council's policy for the payment of the Real Living Wage will apply and also the recommended supplier will be encouraged to complete at least one project per contract advertised by a third sector organisation on [www.matchmyproject.org](http://www.matchmyproject.org).

**7.2 Legal Implications**

7.2.1 Under S.2 Local Government Act 2000 the Council is empowered to do anything which it considers is likely to further the social wellbeing of its area.

7.2.2 The works are made under the general powers of competence as set out under Section 1 of the Localism Act 2011, by which the Council has the power to enter into the arrangements set out in this report.

### **7.3 Financial Implications**

The report seeks approval to fund the replacement of boiler systems at Ladywood H&CC and Kings Heath CC through Corporate Capital Contingency resources of £593,650. This includes fees and contingency provision of £32,000 for each project. The annual cost of borrowing is £66,000 over 10 years. The current temporary solution is costing £80,000 per year and is not sustainable as it is being funded in the short term by deferring other works.

### **7.4 Procurement Implications (if required)**

The details of the procurement processes undertaken for both projects are set out in Appendices 5 and 6.

### **7.5 Human Resources Implications (if required)**

The project will be managed by existing Council staff.

### **7.6 Public Sector Equality Duty**

An initial equality impact assessment has been undertaken (EQUA930). The conclusion is that the maintenance of existing facilities would have no disproportionate adverse impact on individuals with protected characteristics.

## **8 Background Documents**

8.1 None

### **List of appendices accompanying this report:**

Appendix 1	Full Business Case
Appendix 1 A	Options Appraisal
Appendix 2	Consultation Matrix
Appendix 3	Environmental & Sustainability Assessment
Appendix 4	Equality Impact Assessment
Appendix 5	Ladywood H&CC Procurement Summary
Appendix 6	Kings Heath CC Procurement Summary
Appendix 7	Exempt



## APPENDIX 1

FULL BUSINESS CASE (FBC)			
<b>A. GENERAL INFORMATION</b>			
<b>A1. General</b>			
<b>Project Title</b> <i>(as per Voyager)</i>	<b>Replacement of Kings Heath and Ladywood Community Centre Boilers</b>		
<b>Voyager code</b>	Xxxx		
<b>Portfolio /Committee</b>	Leader	<b>Directorate</b>	City Operations
<b>Approved by Project Sponsor</b>	Chris Jordan 21.06.2022	<b>Approved by Finance Business Partner</b>	Carl Tomlinson 28.06.22
<b>A2. Outline Business Case approval</b> <i>(Date and approving body)</i>			
Due to the urgency of these works a Full Business Case has been prepared supported by an Options Appraisal			
<b>A3. Project Description</b>			
<p>The project is to replace failed boiler systems which are obsolete and beyond economic repair at Kings Heath Community Centre (CC) and Ladywood Health and Community Centre (H&amp;CC), in order to:</p> <ul style="list-style-type: none"> <li>- relieve an unfunded budget pressure associated with the hire of temporary boilers;</li> <li>- improve energy efficiency and reduce carbon emissions; and</li> <li>- allow the Centres to remain open to enable the local community to continue to access the social and health benefits of regular community activities.</li> </ul> <p>Kings Heath Community Centre is a well used facility located on Heathfield Road, just off Kings Heath High Street. Ladywood Health and Community Centre is a large multi-storey facility built with capital investment from the NHS and is subject to a long term legal agreement regarding respective rights and responsibilities for the property.</p> <p>At both sites the boiler systems supplying hot water and heating have failed completely. As an emergency interim measure, to keep the Centres operational, temporary boilers have been installed on a monthly hire agreement but these are proving costly to run. The proposed project is to undertake replacement of the boiler systems with high energy efficiency models.</p> <p>This business case seeks approval to replace the boiler systems at both sites funded from Corporate Capital Contingency at a project cost of £593,650 including fees and contingency provisions.</p>			
<b>A4. Scope</b>			
Full replacement of existing boilers, flues, plant, controls, and associated works at Ladywood H&CC and Kings Heath CC.			

## A5. Scope exclusions

All other existing services are outside of the full design specification provided.

## B. STRATEGIC CASE

*This sets out the case for change and the project's fit to the Council Plan objectives*

### B1. Project objectives and outcomes

*The case for change including the contribution to Council Plan objectives and outcomes*

The proposal supports the Birmingham City Council Plan 2018-2022 (as updated in 2019) by contributing to the Council's Key Priorities, specifically :

#### **Priority 1 Birmingham is an entrepreneurial city to learn, work and invest in;**

The Centres host after-school and nursery provision which supports parents to access employment and training opportunities. Specific welfare, family, food and debt support are also on offer.

#### **Priority 2 Birmingham is an aspirational city to grow up in;**

The Centres also host sessions for pre-school children, older children and young people. These activities help develop younger children's social skills, enabling them to be more ready to start school; and the youth club and theatre group give young people the chance to meet new friends and develop life skills which assists their personal development, supports their wellbeing, and enables them to take advantage of future learning and job opportunities.

#### **Priority 3 Birmingham is a fulfilling city to age well in;**

The Centres are local hubs for the community and residents of all ages but also run activities specifically aimed at older people such as senior citizens' social clubs. These activities help break down social isolation, encourage residents to feel part of the community and enable them to remain physically active and mentally alert.

#### **Priority 4 Birmingham is a great clean and green city to live in;**

The Centres are part of the network of hubs across the City that serve a vital function in communities, giving people an opportunity to have fun, socialise, learn, exercise and access key support services. Community and voluntary groups do incredible work to bring people together and to support individuals in difficult circumstances. Post pandemic, this support has assumed an even greater significance and facilities such as Kings Heath CC and Ladywood H&CC are key to community recovery, providing food, welfare and debt support.

#### **Priority 6 Birmingham is a city that takes a leading role in tackling climate change;**

Replacing the boilers systems with more modern energy efficient models will make the building more energy efficient and reduce carbon emissions.

The proposal also supports the **Property Strategy 2018/19 – 2023/24** by putting forward a solution whereby existing operational buildings can be improved and their life extended.

**Birmingham Business Charter for Social Responsibility (BBC4SR)**

The value of this contract is below the works threshold for the BBC4SR to apply. However, the Council's policy for the payment of the Real Living Wage will apply and also the recommended supplier will be encouraged to complete at least one project advertised by a third sector organisation on [www.matchmyproject.org](http://www.matchmyproject.org).

**B2. Project Deliverables**

*These are the outputs from the project eg a new building with xm2 of internal space, xm of new road, etc*

The replacement of failed boiler systems at two community facilities, with more modern energy efficient models, to provide heating and hot water.

**B3. Project Benefits**

*These are the social benefits and outcomes from the project, eg additional school places or economic benefits.*

Measure	Impact
<i>List at least one measure associated with <b>each</b> of the objectives and outcomes in B1 above</i>	<i>What the estimated impact of the project will be on the measure identified – please quantify where practicable (eg for economic and transportation benefits)</i>
Maintain BCC owned assets	Asset life extended
Modern and energy efficient heating and hot water	Reduced running costs though more efficient systems and temporary boiler hire costs avoided
Improve the carbon footprint of the building by replacing obsolete boilers with modern energy efficient models	Reduced carbon emissions
Fulfil Council responsibilities to maintain the property set out in the current legal agreement with the NHS (Ladywood only)	Reputational and relationship damage avoided

**B4. Benefits Realisation Plan**

*Set out here how you will ensure the planned benefits will be delivered*

A project implementation review will be held with the end user after 12 months + of the works being operational to learn what impact the new facility has had on the service to inform future decision making and project planning.

**B5. Stakeholders**

A stakeholder analysis is set out at G4 below. A summary of consultation responses is included in the covering Executive report.

**C. ECONOMIC CASE AND OPTIONS APPRAISAL**

*This sets out the options that have been considered to determine the best value for money in*

**achieving the Council's priorities****C1. Summary of options reviewed at Outline Business Case**

*(including reasons for the preferred option which has been developed to FBC)*

*If options have been further developed since the OBC, provide the updated Price quality matrix and recommended option with reasons.*

**Option 1 – Replace the boiler systems at Kings Heath and Ladywood Centres**  
**recommended**

This is the only option that will allow the Centres to keep functioning in the longer term and is a more cost-effective solution than the on-going using of temporary boilers for which the service is paying hire of c£80,000 per year. The project cost to replace the two boiler systems is estimated at £593,650 including fees and contingency provisions.

**Option 2 – Continue with temporary boilers**

Temporary boilers are being hired as a short-term emergency measure in order that the Centres could continue to open to the public. However, the hire charges amount to an estimated £80,000 per year which is creating a budget pressure for the service. The hire costs are being met on a temporary basis by deferring expenditure in other areas of service and therefore this solution cannot be sustained indefinitely. Therefore, this option was discounted.

**Option 3 – Repair the existing boiler systems**

Following inspection, Acivico Ltd have advised that the boiler systems are obsolete and are beyond economic repair and that, at best, repairs would offer only a short-term solution as other parts of the system could fail at any time. This option was therefore discounted.

**C2. Evaluation of key risks and issues**

*The full risks and issues register is included at the end of this FBC*

Additional costs during the construction period due to increased labour and/or materials costs

**Mitigation:** This is a fixed price contract with a contingency built in for unforeseen circumstances. Costs will be managed by Acivico Ltd within the budget provision

Unforeseen additional works may arise during the installation of the boiler systems, creating an additional funding requirement.

**Mitigation:** The overall cost of the projects includes a contingency of £34,000 to account for any unforeseen circumstances which may occur during the construction period.

Work not completed on time in accordance with the agreed programme

**Mitigation:** The contractor will work to an agreed programme of scheduled activities that will be reviewed at each progress meeting. For each scheme, slippage of activities will be highlighted at an early stage and activities rescheduled/adjusted to mitigate any delays to meet the critical path milestones.



**C3. Other impacts of the preferred option**

*Describe other significant impacts, both positive and negative*

Overall, the project delivers positive benefits to the current and potential service users as set out in section B1.

However, the work may involve temporary disruption to service provision and constrain access to the community centres, which will be discussed prior to any works commencing and managed to minimise any impact on user groups and other customers.

**D. COMMERCIAL CASE**

*This considers whether realistic and commercial arrangements for the project can be made*

**D1. Partnership, Joint venture and accountable body working**

*Describe how the project will be controlled, managed and delivered if using these arrangements*

Acivico Ltd will manage the project on behalf of the client (the City Wide Community Centre Manager)

**D2. Procurement implications and Contract Strategy:**

*What is the proposed procurement contract strategy and route? Which Framework, or OJEU? This should generally discharge the requirement to approve a Contract Strategy (with a recommendation in the report).*

The procurement strategy for the works was to undertake a direct award using Acivico Ltd's Constructing West Midlands Building Fabric Framework Agreement as detailed in the Cabinet report.

**D3. Staffing and TUPE implications:**

N/A

**E. FINANCIAL CASE**

*This sets out the cost and affordability of the project*

**E1. Financial implications and funding**

<b>Capital Expenditure:</b>	<b>Financial Year 22/23 £'m</b>	<b>Financial Year 23/24 £'m</b>	<b>Financial Year 24/25 £'m</b>	<b>Later Years £'m</b>	<b>Totals £'m</b>
Voyager capital code: XXX					
Capital costs already incurred:					
Other costs to complete project :					
Fees	0.026 0.029				<b>0.055</b>
Land Acquisition Works					
Works	0.220				

## APPENDIX 1

	0.255				0.475
Contingencies	0.017 0.017				0.034
Inflation Allowance	0.015 0.015				0.030
<b>Total Capital Expenditure</b>	<b>0.594</b>				<b>0.594</b>
<b>Capital Funding:</b>	<b>Financial Year 22/23 £'m</b>	<b>Financial Year 23/24 £'m</b>	<b>Financial Year 24/25 £'m</b>	<b>Later Years £'m</b>	<b>Totals £'m</b>
Development costs funded by: ( <i>Please itemise</i> )					
Other Costs Funded by: Prudential Borrowing	0.594				
<b>Total Capital Funding</b> Must fund all the costs	<b>0.594</b>				
<b>Revenue Consequences</b>	<b>Financial Year 22/23 £'m</b>	<b>Financial Year 23/24 £'m</b>	<b>Financial Year 24/25 £'m</b>	<b>Later Years £'m</b>	<b>Totals £'m</b>
Voyager rev. budget code:	XXXX				
Development costs (revenue)					
Operating period expenditure:					
Prudential Borrowing Charges		0.066	0.066	0.530	0.663
Income					
Savings					
<b>Total Revenue Consequences</b>					
<b>Revenue Funding:</b>					
Current Budgetary Provision					
Other revenue resources identified:					
<i>Corporate Funding assumed additional 20 year life to facility</i>					
<b>Total revenue funding</b>		0.066	0.066	0.530	0.663
<b>E2. Evaluation and comment on financial implications:</b>					

The report seeks approval to fund the replacement of boiler systems at Ladywood H&CC and Kings Heath CC through Corporate Capital Contingency resources of up to £593,650. The annual cost of borrowing is £66,000 over 10 years. The current temporary solution is costing c£80,000 per year and is not sustainable and is being funded in the short term by deferring other works.

### E3. Approach to optimism bias and provision of contingency

The project cost includes 13% of the contract value for contingencies

### E4. Taxation

*Describe any tax implications and how they will be managed, including VAT*

The Council will be able to recover the 20% VAT on payments to the contractor under the normal procedures.

As this is a construction project, the requirements of HMRC's Construction Industry Tax Scheme will be included in the contract documentation to ensure the Council's compliance

## F. PROJECT MANAGEMENT CASE

*This considers how project delivery plans are robust and realistic*

### F1. Key Project Milestones

*The summary Project Plan and milestones is attached at G1 below*

	Planned Delivery Dates
Capital Board	7 July 2022
Cabinet	26 July 2022
Start on site	TBC
Practical completion	TBC
Date Project operational	TBC
Date of Post Implementation Review	TBC

### F2. Achievability

*Describe how the project can be delivered given the organisational skills and capacity available*

Acivico Ltd and the CWM#2 framework contractors have all got extensive experience and knowledge of working on refurbishment projects similar to this proposal

### F3. Dependencies on other projects or activities

None identified

### F4. Officer support

**Project Manager:** Keith Dugmore, City-Wide Community Centre Manager

**Project Accountant:** Lisa Pendlebury

**Project Sponsor:** Chris Jordan, Assistant Director, Neighbourhoods Division

### F5. Project Management

*Describe how the project will be managed, including the responsible Project Board and who its members are*

The construction contract will be administered by Acivico Ltd and the client will be represented by the Client PM, the City Wide Community Centre Manager who will be responsible for ensuring the governance process and project methodology is adhered to.

**G. SUPPORTING INFORMATION**

*(Please adapt or replace the formats as appropriate to the project)*

**G1. PROJECT PLAN**

*Detailed Project Plan supporting the key milestones in section F1 above*

A detailed project plan based on the target timescale of 18 weeks will be agreed between the contractor and the client and will include :

- Pre-start site meeting with Acivico Ltd, City Wide Community Centre Manager, Contractor
- Risk Assessment for site users
- Communication with user groups
- Progress monitoring reports/meetings

**G2. SUMMARY OF RISKS AND ISSUES REGISTER**

*Risks should include Optimism Bias, and risks during the development to FBC*

*Grading of severity and likelihood: High – Significant – Medium - Low*

		Risk after mitigation:	
Risk or issue	mitigation	Severity	Likelihood
1. Unforeseen additional works arise in course of refurbishment causing additional funding requirement	This is a fixed price contract with a contingency built in for unforeseen circumstances. Costs will be managed by Acivico Ltd within the budget provision	Low	High
2. Work not completed on time	The contractor will work to an agreed programme of scheduled activities that will be reviewed at each progress meeting. For each scheme, slippage of activities will be highlighted at an early stage and activities rescheduled/adjusted to mitigate any delays to meet the critical path milestones.	Medium	Low
3. Unforeseen additional works may arise during the installation of the boiler systems, creating an additional funding requirement.	The overall cost of the projects includes a contingency to account for any unforeseen circumstances which may occur during the construction period.	High	Medium



**G3. EXTERNAL FUNDING AND OTHER FINANCIAL DETAILS**

*Description of external funding arrangements and conditions, and other financial details supporting the financial implications in section E1 above (if appropriate)*

N/A

**G4. STAKEHOLDER ANALYSIS**

Stakeholder	Role and significance	how stakeholder relationships will be managed
Regular user groups/tenants	Service Users/High	Liaison between contractor, Acivico and the Project Manager (as per C3)
Ward Councillors	Represent the ward and constituents/High	Project manager to manage communications
NHS Estates	Partner and Funder/Low	Project Manager to manage communications
Assistant Director Neighbourhoods	Overall responsibility of the asset/ High	Briefed through line management arrangements
Contractor	Responsible for managing and carrying out the work/High	Regular progress review on-site and broader liaison meeting with Acivico Ltd
Acivico Ltd	Responsible for awarding contract and managing relationship with contractor	Regular communications/progress update reviews

**Other Attachments**

*provide as appropriate*

- Appendix 1 A Options Appraisal

- 

- 

-



## APPENDIX 1 Attachment A

**C. ECONOMIC CASE - OPTIONS APPRAISAL**

*This sets out the options that have been considered to determine the best value for money in achieving the Council's priorities*

**C1. Options reviewed**

*A full description and review of each option is in Section G1*

**Option 1 - recommended option – replace the boiler systems at Kings Heath and Ladywood Community Centres**

This is the only option that will allow the Centres to keep functioning in the longer term and is a more cost-effective solution than the on-going using of temporary boilers for which the service is paying hire charges of c£80,000 a year. The project cost to replace the two boiler systems is estimated at £593,650 including fees and contingency provisions.

**Option 2 – continue with temporary boilers**

Temporary boilers are being hired as a short-term emergency measure in order that the Centres could continue to open to the public. However, the hire charges amount to an estimated £80,000 per year which is creating a budget pressure for the service. The hire costs are being met on a temporary basis by deferring expenditure in other areas of service and therefore this solution cannot be sustained indefinitely. Therefore, this option was discounted.

**Option Discounted – repair of existing system**

Following inspection, Acivico Ltd have advised that the boiler systems are obsolete and are beyond economic repair and that, at best, repairs would offer only a short- term solution as other parts of the system could fail at any time. This option was therefore discounted.

**C2. Summary of Options Appraisal – Price/Quality Matrix**

	Option score (out of 10)				Weight	Weighted Score	
Criteria	1	2	3		1	2	3
1. Total capital cost	0	10	10	20%	0.0	2.0	2.0
2. Upfront revenue cost	10	0	0		2.0	0.0	0.0
3. Full year revenue consequences	8	4	2	30%	2.4	1.2	0.6
4. Benefits: Council priorities	10	6	2	40%	4.0	2.4	0.8
5. Benefits: Service priorities							
6. Deliverability and risks	8	6	4	10%	0.8	0.6	0.4
7. Other impacts							
<b>Total</b>	36	26	18	<b>100%</b>	9.2	6.2	3.8

**G. SUPPORTING INFORMATION**

*(Please adapt or replace the formats as appropriate to the project)*

**G1. OBC OPTIONS APPRAISAL RECORDS (these are summarised in section C2)**

*The following sections are evidence of the different options that have been considered in arriving at the proposed solution. All options should be documented individually.*

<b>Option 1</b>	<b><u>Recommended option</u> – replace the boilers systems at Kings Heath and Ladywood Community Centres</b>
<b>Information Considered</b>	<p><i>What information was considered in evaluating the option – this must be the same for each option considered.</i></p> <ul style="list-style-type: none"> <li>• Capital cost</li> <li>• Revenue costs</li> <li>• Views of customers, local community and elected representatives</li> <li>• Likely life of option</li> <li>• Effectiveness of solution</li> </ul>
<b>Pros and Cons of Option</b>	<p><i>What were the advantages/positive aspects of this option?</i></p> <ul style="list-style-type: none"> <li>• This option will permanently resolve the problem ie provide heating and hot water at both facilities</li> <li>• Avoids on-going and escalating hire and off contract fuel costs</li> <li>• Keeps an existing asset in use for the residents of Birmingham</li> <li>• Meets the expectations of user groups, Ward Councillors and the local community</li> </ul> <p><i>What are the Disadvantages/negative aspects of this option?</i></p> <ul style="list-style-type: none"> <li>• Capital cost</li> </ul>
<b>People Consulted</b>	<p><i>Who was consulted regarding development of key elements of this option</i></p> <p>Ward Councillors Kings Heath &amp; Brandwood Ward  Ward Councillors Ladywood Ward  NHS Estate Services (Ladywood H&amp;CC)</p>
<b>Recommendation</b>	Proceed or <del>Abandon this Option</del>
<b>Principal Reason for Decision</b>	<p><i>What are the key reasons for the recommendation regarding this option</i></p> <p>This is the only option that provides a permanent solution</p>

<b>Option 2</b>	<b>Continue with temporary boilers</b>
<b>Information Considered</b>	<p><b>What information was considered in evaluating the option – this must be the same for each option considered.</b></p> <ul style="list-style-type: none"> <li>• Capital cost</li> <li>• Revenue costs</li> <li>• Views of customers, local community and elected representatives</li> <li>• Likely life of option</li> <li>• Effectiveness of solution</li> </ul>
<b>Pros and Cons of Option</b>	<p><i>What were the advantages/positive aspects of this option?</i></p> <ul style="list-style-type: none"> <li>• There is no immediate requirement for capital resources</li> </ul> <p><i>What are the Disadvantages/negative aspects of this option?</i></p> <ul style="list-style-type: none"> <li>• On-going and escalating hire and fuel costs that cannot be afforded from the service revenue budget</li> </ul>
<b>People Consulted</b>	<p><i>Who was consulted regarding development of key elements of this option?</i></p> <p>Ward Councillors Kings Heath &amp; Brandwood Ward Ward Councillors Ladywood Ward NHS Estate Services (Ladywood H&amp;CC)</p>
<b>Recommendation</b>	<del>Proceed</del> or Abandon this Option
<b>Principal Reason for Decision</b>	<p><i>What are the key reasons for the recommendation regarding this option</i></p> <p>On-going, unfunded, boiler hire charges which are not sustainable</p>

<b>Option 3</b>	<b>Repair existing boiler systems</b>
<b>Information Considered</b>	<p><b>What information was considered in evaluating the option – this must be the same for each option considered.</b></p> <ul style="list-style-type: none"> <li>• Capital cost</li> <li>• Revenue costs</li> <li>• Views of customers, local community and elected representatives</li> <li>• Likely life of option</li> <li>• Effectiveness of solution</li> </ul>
<b>Pros and Cons of Option</b>	<p><i>What were the advantages/positive aspects of this option?</i></p> <ul style="list-style-type: none"> <li>• One off revenue cost rather than on-going prudential borrowing charges</li> </ul> <p><i>What are the Disadvantages/negative aspects of this option?</i></p> <ul style="list-style-type: none"> <li>• Not feasible as boilers obsolete and beyond economic repair</li> </ul>
<b>People Consulted</b>	<p><i>Who was consulted regarding development of key elements of this option?</i></p> <p>Ward Councillors Kings Heath &amp; Brandwood Ward Ward Councillors Ladywood Ward NHS Estate Services (Ladywood H&amp;CC)</p>
<b>Recommendation</b>	<del>Proceed</del> or Abandon this Option
<b>Principal Reason for Decision</b>	<p><i>What are the key reasons for the recommendation regarding this option</i></p> <p>Not feasible</p>





# **Kings Heath and Ladywood Boiler Replacement Ward Councillors Consultation Responses**

<b>Stakeholder</b>	<b>Ward</b>	<b>Site (if report relates to multi sites)</b>	<b>Response to consultation on 08.07.22</b>
<b>Councillor Lisa Trickett</b>	<b>Brandwood &amp; Kings Heath Ward</b>	<b>Kings Heath Community Centre</b>	<b>Supportive of the proposal – 08.07.22</b>
<b>Councillor David Barker</b>	<b>Brandwood &amp; Kings Heath Ward</b>	<b>Kings Heath Community Centre</b>	<b>Supportive of the proposal – 09.07.22</b>
<b>Councillor Sir Albert Bore</b>	<b>Ladywood Ward</b>	<b>Ladywood Health &amp; Community Centre</b>	<b>Supportive of the proposal – 09.07.22</b>
<b>Councillor Kath Hartley</b>	<b>Ladywood Ward</b>	<b>Ladywood Health &amp; Community Centre</b>	<b>Supportive of the proposal – 09.07.22</b>

Note to report authors – this is a generic form and needs to be formatted to align with the proposals you have consulted on.



## APPENDIX 3

Title of proposed EIA	Community Centre Replacement Boilers
Reference No	EQUA930
EA is in support of	Amended Service
Review Frequency	Two Years
Date of first review	16/06/2024
Directorate	City Operations
Division	Neighbourhoods
Service Area	Community Centres
Responsible Officer(s)	<input type="checkbox"/> Lesley Poulton
Quality Control Officer(s)	<input type="checkbox"/> Leroy Pearce
Accountable Officer(s)	<input type="checkbox"/> Lesley Poulton
Purpose of proposal	Replacement of Boilers
Data sources	Consultation Results; relevant reports/strategies
Please include any other sources of data	Design and Feasibility Report from Acivico Ltd
ASSESS THE IMPACT AGAINST THE PROTECTED CHARACTERISTICS	
Protected characteristic: Age	Service Users / Stakeholders; Employees; Wider Community
Age details:	Replacing a temporary boiler with a permanent solution to provide heating and hot water at Kings Heath and Ladywood Community Centres will benefit all user groups including children attending pre-school and after school clubs, and older adults accessing services and activities.
Protected characteristic: Disability	Service Users / Stakeholders; Employees
Disability details:	Replacing a temporary boiler with a permanent solution to provide heating and hot water at Kings Heath and Ladywood Community Centres will benefit all user groups including those with disabilities and chronic health conditions.
Protected characteristic: Sex	Not Applicable
Gender details:	
Protected characteristics: Gender Reassignment	Not Applicable
Gender reassignment details:	
Protected characteristics: Marriage and Civil Partnership	Not Applicable
Marriage and civil partnership details:	
Protected characteristics: Pregnancy and Maternity	Not Applicable
Pregnancy and maternity details:	
Protected characteristics: Race	Not Applicable
Race details:	
Protected characteristics: Religion or Beliefs	Not Applicable
Religion or beliefs details:	
Protected characteristics: Sexual Orientation	Not Applicable
Sexual orientation details:	
Socio-economic impacts	Replacing a temporary boiler with a permanent solution to provide heating and hot water at Kings Heath and Ladywood Community Centres will benefit all user groups including those accessing welfare, food and debt support services.

Please indicate any actions arising from completing this screening exercise.

Please indicate whether a full impact assessment is recommended NO

What data has been collected to facilitate the assessment of this policy/proposal? Technical advise from Acivico Ltd on options

Consultation analysis

Ward Councillors

Leader/Cabinet Member

Feedback from service users

NHS Property Services Ltd

All are supportive of the proposal

Adverse impact on any people with protected characteristics. None identified

Could the policy/proposal be modified to reduce or eliminate any adverse impact? N/A - the poposal will benefit all user groups equally, including individuals with protected characteristics

How will the effect(s) of this policy/proposal on equality be monitored? N/A

What data is required in the future? N/A

Are there any adverse impacts on any particular group(s) No

If yes, please explain your reasons for going ahead.

Initial equality impact assessment of your proposal

The proposal will benefit all user groups equally, including individuals with protected characteristics

Consulted People or Groups

Informed People or Groups

Summary and evidence of findings from your EIA

The replacement of temporary boilers with permanent solutions to provide heating and hot water at Kings Heath and Ladywood Community Centres will benefit all user groups and will also reduce carbon emmissions as the new boilers will be modern energy efficient models.

#### QUALITY CONTORL SECTION

Submit to the Quality Control Officer for reviewing? No

Quality Control Officer comments Passed to the Accountable Officer for final approval.

Decision by Quality Control Officer Proceed for final approval

Submit draft to Accountable Officer? Yes

Decision by Accountable Officer Approve

Date approved / rejected by the Accountable Officer 27/06/2022

Reasons for approval or rejection

Please print and save a PDF copy for your records Yes

Content Type: Item

Version: 27.0

Created at 16/06/2022 01:02 PM by ☐ Lesley Poulton

Last modified at 27/06/2022 11:25 AM by Workflow on behalf of ☐ Lesley Poulton

Close



## APPENDIX 4

<b>Project Title:</b>		<b>Replacement of Kings Heath Community Centre and Ladywood Health &amp; Community Centre Boilers</b>		
<b>Department:</b> City Operations		<b>Team:</b> Neighbourhoods		<b>Person Responsible for assessment:</b> Lesley Poulton
<b>Date of assessment:</b> 17.01.22		<b>Is it a new or existing policy/strategy/decision/development proposal?</b> New capital project		
<b>Brief description of the proposal:</b> To replace the boilers and ancillary systems that provide heating and hot water at Kings Heath CC and Ladywood H&CC as the existing ones have failed completely and cannot be repaired as they are obsolete.				
<b>Potential impacts of the policy/development decision/procedure/ on:</b>	<b>Positive Impact</b>	<b>Negative Impact</b>	<b>No Specific Impact</b>	<b>What will the impact be? If the impact is negative, how can it be mitigated, what action will be taken?</b>
Natural Resources - Impact on natural resources including water, soil, air			X	No impact arising from replacing boilers in existing buildings
Energy use and CO <sub>2</sub> emissions	X			<p>The new boilers and control systems will be much more energy efficient than the failed existing ones, and the temporary oil fuelled hired boilers that are in place pending a permanent solution, will reduce energy consumption and hence CO2 emissions. All new boilers have to be A rated as part of building regs. The new boilers being installed are 97% efficient. The existing boilers on both these sites are between 60 to 65% efficient and are D/E rated</p> <p>The new controls will work to make the system more efficient. The controls panel includes a software package (similar to BEMS) which can be installed on a onsite computer and full control will be available for the end user. The system will be compensated and boilers are modulated along with the heating pumps creating less energy use for the mechanical plant. This will also mean the system will</p>

## APPENDIX 4

				benefit from using less gas consumption.
Quality of environment	X		X	The new boilers and control systems will be much more energy efficient than the failed existing ones, and the temporary oil fuelled hired boilers that are in place pending a permanent solution, will reduce energy consumption and hence CO2 emissions.
Impact on biodiversity			X	No impact arising from replacing boilers in existing buildings
Use of sustainable products and equipment			X	No impact arising from replacing boilers in existing buildings
Minimising waste	X			All waste materials are removed and transferred to the appropriate disposal site for recycling. Waste transfer notices are submitted to the project management.
Council plan priority: a city that takes a leading role in tackling climate change	X			The new boilers and control systems will be much more energy efficient than the failed existing ones, and the temporary oil fuelled hired boilers that are in place pending a permanent solution, will reduce energy consumption and hence CO2 emissions.
Overall conclusion on the environmental and sustainability impacts of the proposal'	The project will not have an adverse impact on the environment and will contribute to the reduction in energy use and hence CO2 emissions.			

## APPENDIX 5

**PROCUREMENT SUMMARY****PROCUREMENT SUMMARY FOR THE AWARD OF CONTRACT FOR THE REPLACEMENT BOILER SYSTEM AT LADYWOOD HEALTH AND COMMUNITY CENTRE**1. Background

- 1.1 As detailed in the Cabinet report, this contract is for the replacement of the boiler system at Ladywood Health and Community Centre.

2. Procurement Approach

## 2.1 Procurement Options

- Tender for a Council only contract – this option was discounted on the basis that the CWM2 Framework Agreement is the Council's preferred route for construction works of this type and no additional benefit would be realised from carrying out a tender process advertised to the open market.
- Use a collaborative framework agreement - the Council's preferred route for construction works of this type is to use the CWM2 Framework Agreement of a wholly owned company of the Council. This is recommended option to use Lot 2 (Mechanical and Electrical Repair and Maintenance).

3. CWM2 Framework Agreement

## 3.1 Award Mechanism

The protocol for the use of the CWM2 Framework Agreement is either a direct award or a further competition exercise is undertaken with the opportunity to be sent to all framework providers against the lot. It is recommended that the direct award mechanism is used for this contract to. In accordance with the CWM2 framework agreement guidance, it is permissible to use direct award where it is identified as the most appropriate route with sufficient justification as to the demonstration of value for money being delivered.

## 3.2 CWM2 states that one or more of the following conditions must be met before commencing the direct award process:

- i) The work is of such an urgent nature that there is insufficient time to carry out a mini-competition process.
- ii) The work is not emergency maintenance work which should be procured using the Maintenance Call-Off contract
- iii) The client has been formally advised of the potential procurement routes (mini-competition, direct award or maintenance) and fully understands the cost and programme impacts of each option. Then having considered the

options approval is given for the direct award approach at Project Inception stage.

3.3 This project meets criteria i and ii above. Acivico Ltd was therefore instructed by the City Wide Community Centre Manager to commence the direct award process. The rationale being due to the emergency nature of the works, the programme required installation to take place over the summer months when heating is unlikely to be required. This would have less of an impact on the day-to-day activities of the community centre and avoid additional cost for a temporary heating system. A mini-competition tender process would have added an additional 6 weeks on to the procurement process for which there was not time causing further disruption and further costs.

3.4 The direct award process uses a 50/50 quality / price ratio to identify the most economically advantageous organisation to be awarded the contract.

- Quality has been assessed using the quality scores awarded to the respective Contractors at CWM framework ITT stage.
- Cost is evaluated based on the default rates and percentages taken from the CWM framework pricing schedules.

3.5 The Lot 2 contractors are as follows:

- Dodd Group (Midlands) Ltd
- Wates Construction Ltd

3.6 Evaluation Summary

3.6.1 Quality Assessment (50% Weighting)

The quality evaluation process was undertaken using a direct award route protocol of the Constructing West Midlands Framework Agreement Set Criteria. The quality evaluation model is based upon the contractors' respective quality scores from the original CWM evaluation. The weighting for quality with sub weightings was as follows:

- 1. 20% for Service Capability, Management & Quality
- 2. 20% for Planned & Reactive Maintenance Services
- 3. 20% for Minor Works and Project Delivery
- 4. 10% for CAFM, ICT & Customer Service
- 5. 10% for Value Creation & Delivery
- 6. 10% for Sustainability & CSR
- 7. 5% for Collaboration & Innovation
- 8. 5% for People

For the purpose of this direct award, the contractor with the highest quality score from the ITT was awarded the maximum 50%. The other contractors were scored as a proportion of the maximum score.

The results are in the table below:

COMPANY	Dodd	Wates
Quality Score – as per framework evaluation (Max 50)	50.00	34.25
<b>Rank</b>	1	2

### 3.6.2 Price Assessment (50% Weighting)

The price evaluation process was undertaken by the direct award route protocol of the Constructing West Midlands Framework Agreement Set Criteria and is detailed in the table below.

Details of the confidential information related to the pricing is in Exempt Appendix 7.

COMPANY	Dodd	Wates
Price Score (Max 50)	50.00	42.93
<b>Rank</b>	1	2

### 3.6.3 Overall Assessment

COMPANY	Dodd	Wates
Quality	50.00	34.25
Price	50.00	42.93
Total	100.00	77.18
<b>Rank</b>	1	2

3.6.4 The protocol to commence the direct award to Dodd Group (Midlands) Ltd is on the basis of being ranked first.

## 3.7 Service Delivery Management

### 3.7.1 Contract Management

The contract will be managed operationally by the Project Manager from Acivico Ltd reporting to the City Wide Community Centre Manager..

### 3.7.2 Performance Management

Formal contract management measures will be included as a requirement of the contract including key performance indicators around service levels.





## APPENDIX 6

**PROCUREMENT SUMMARY****PROCUREMENT SUMMARY FOR THE AWARD OF CONTRACT FOR THE REPLACEMENT BOILER SYSTEM AT KINGS HEATH COMMUNITY CENTRE**1. Background

- 1.1 As detailed in the Cabinet report, this contract is for the replacement of the boiler system at Kings Health Community Centre.

2. Procurement Approach

## 2.1 Procurement Options

- Tender for a Council only contract – this option was discounted on the basis that the CWM2 Framework Agreement is the Council's preferred route for construction works of this type and no additional benefit would be realised from carrying out a tender process advertised to the open market.
- Use a collaborative framework agreement - the Council's preferred route for construction works of this type is to use the CWM2 Framework Agreement of a wholly owned company of the Council. This is recommended option to use Lot 2 (Mechanical and Electrical Repair and Maintenance).

3. CWM2 Framework Agreement

## 3.1 Award Mechanism

The protocol for the use of the CWM2 Framework Agreement is either a direct award or a further competition exercise is undertaken with the opportunity to be sent to all framework providers against the lot. It is recommended that the direct award mechanism is used for this contract to. In accordance with the CWM2 framework agreement guidance, it is permissible to use direct award where it is identified as the most appropriate route with sufficient justification as to the demonstration of value for money being delivered.

## 3.2 One or more of the following conditions must be met before commencing the direct award process:

- i) The work is of such an urgent nature that there is insufficient time to carry out a mini-competition process.
- ii) The work is not emergency maintenance work which should be procured using the Maintenance Call-Off contract
- iii) The client has been formally advised of the potential procurement routes (mini-competition, direct award or maintenance) and fully understands the cost and programme impacts of each option. Then having considered the

options approval is given for the direct award approach at Project Inception stage.

3.3 This project meets criteria i and ii above. Acivico Ltd was therefore instructed by the City Wide Community Centres Manager to commence the direct award process. The rationale being due to the emergency nature of the works, the programme required installation to take place over the summer months when heating is unlikely to be required. This would have less of an impact on the day-to-day activities of the community centre and avoid additional cost for a temporary heating system. A mini-competition tender process would have added an additional 6 weeks on to the procurement process for which there was not time causing further disruption and further costs.

3.4 The direct award process uses a 50/50 quality / price ratio to identify the most economically advantageous organisation to be awarded the contract.

- Quality has been assessed using the quality scores awarded to the respective Contractors at CWM framework ITT stage.
- Cost is evaluated based on the default rates and percentages taken from the CWM framework pricing schedules. .

3.5 The Lot 2 contractors are as follows:

- Dodd Group (Midlands) Ltd
- Wates Construction Ltd

3.6 Evaluation Summary

3.6.1 Quality Assessment (50% Weighting)

The quality evaluation process was undertaken using a Direct Award route protocol of the Constructing West Midlands Framework Agreement Set Criteria. The quality evaluation model is based upon the contractors' respective quality scores from the original CWM evaluation. The weighting for quality with sub weightings is as follows:

- 1. 20% for Service Capability, Management & Quality
- 2. 20% for Planned & Reactive Maintenance Services
- 3. 20% for Minor Works and Project Delivery
- 4. 10% for CAFM, ICT & Customer Service
- 5. 10% for Value Creation & Delivery
- 6. 10% for Sustainability & CSR
- 7. 5% for Collaboration & Innovation
- 8. 5% for People

For the purpose of this direct award, the contractor with the highest quality score from the ITT was awarded the maximum 50%. The other contractors were scored as a proportion of the maximum score.

The results are in the table below:

COMPANY	Dodd	Wates
Quality Score – as per framework evaluation (Max 50)	50.00	34.25
<b>Rank</b>	1	2

### 3.6.2 Price Assessment (50% Weighting)

The price evaluation process was undertaken by the Direct Award Constructing West Midlands Framework Agreement Set Criteria and is detailed in the table below. The price score was determined by building up an estimated cost-plus price for each contractor using the framework rates where available and in the absence of framework rates, the same 'indicative' prime cost values were utilised for both to ensure normalisation of the figure.

Details of the confidential information related to the pricing is in Exempt Appendix 7.

COMPANY	Dodd	Wates
Price Score (Max 50)	50.00	42.93
<b>Rank</b>	1	2

### 3.6.3 Overall Assessment

COMPANY	Dodd	Wates
Quality	50.00	34.25
Price	50.00	42.93
Total	100.00	77.18
<b>Rank</b>	1	2

3.6.4 The protocol to commence the direct award to Dodd Group (Midlands) Ltd is on the basis of being ranked first.

## 3.7 Service Delivery Management

### 3.7.1 Contract Management

The contract will be managed operationally by the Project Manager from Acivico Ltd reporting to the City Wide Community Centre Manager.

### 3.7.2 Performance Management

Formal contract management measures will be included as a requirement of the contract including key performance indicators around service levels.





# Birmingham City Council

## Report to Cabinet

26 July 2022



**Subject:** APPOINTMENTS TO OUTSIDE BODIES

**Report of:** City Solicitor

**Relevant Cabinet Member:** Cllr Ian Ward, Leader of the Council

**Relevant O & S Chair(s):** Cllr Sir Albert Bore, Chairman of Co-ordinating Overview and Scrutiny Committee

**Report author:** Errol Wilson, Committee Services

Tel: 0121 675 0955

e-mail: [errol.wilson@birmingham.gov.uk](mailto:errol.wilson@birmingham.gov.uk)

Are specific wards affected?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No – All wards affected
If yes, name(s) of ward(s):		
Is this a key decision?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
If relevant, add Forward Plan Reference:		
Is the decision eligible for call-in?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No
Does the report contain confidential or exempt information?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
If relevant, provide exempt information paragraph number or reason if confidential :		

### 1 Executive Summary

- 1.1 The report seeks the approval of the Cabinet to the appointment of representatives to serve on outside bodies detailed in the appendix to this report.

### 2 Recommendations

- 2.1 That Cabinet agrees to appoint representatives to serve on the Outside Bodies detailed in the appendix to this report.

### **3 Background**

- 3.1 At a meeting of all Councillors on 11 July 2017, the City Council approved changes to the Constitution that set out those appointments that are reserved to the full City Council to determine. All other appointments of Members and officers to outside bodies shall be within the remit of Cabinet to determine and the proportionality rules will not automatically apply.

### **4 Options considered and Recommended Proposal**

- 4.1 These appointments are a matter for the Cabinet to determine, in accordance with the City Council's current Constitution.

### **5 Consultation**

For appropriate items, the Secretaries to the Political Groups represented on the Council.

### **6 Risk Management**

- 6.1 The main risk of not making appointments might lead to the City Council not being represented at meetings of the bodies concerned. It is always important in making appointments to have regard to the City Council's equal opportunities policies.

### **7 Compliance Issues:**

- 7.1 How are the recommended decisions consistent with the City Council's priorities, plans and strategies?

7.1.1 The appointments are consistent with the legal and constitutional requirements of the City Council.

#### **7.2 Legal Implications**

7.2.1 As set out in paragraph 7.1.1 above.

#### **7.3 Financial Implications**

7.3.1 There are no additional resource implications. Where applicable, those implications arise at the time that the relevant body, or a grant to it, is established.

#### **7.4 Procurement Implications (if required)**

7.4.1 Not applicable.

#### **7.5 Human Resources Implications (if required)**

7.5.1 Not applicable.

#### **7.6 Public Sector Equality Duty**

7.6.1 As set out in paragraph 6.1 above.

## **8 Background Documents**

- 8.1 Report of the Council Business Management Committee to City Council on 11 July 2017 “Revised City Council Constitution”; along with relevant e-mails/file(s)/correspondence on such appointments.

**Attached:** Appendix to Report to Cabinet – 26 July 2022 - Appointments to Outside Bodies



**APPENDIX TO REPORT TO CABINET 26 July 2022**  
**APPOINTMENTS TO OUTSIDE BODIES****1. Summary of Decisions**

On 15 August 2017, Cabinet resolved under decision number 004096/2017 that the practice be continued of contacting each representative when their term of office is due to expire to ascertain whether they are willing to be re-appointed and that, unless indicated otherwise in the report to Cabinet, it will be understood that such representatives are not willing to be re-appointed.

**ANNUAL APPOINTMENTS**

Further to the meeting on 28 June 2022, the following amendments are proposed to the schedule of annual appointments:-

**2. Harborne Business Improvement District (BID)**

Permission for Councillor Jayne Francis to sit on Harborne BID until 31 December 2022 and for this to continue should the BID be successful at ballot until the annual appointment is reviewed in 2023/24.

Therefore it is

**RECOMMENDED:-**

To appoint Cllr Jayne Francis (Lab) from 26 July 2022 until 25 July 2023, as Representative.

**NON ANNUAL APPOINTMENT****3. Alderson Disabled Ex-Servicemen's Homes Trust**

Four Representative Trustees appointed by City Council for a term of four years. Lord Mayor (ex officio). Need not be members of the Council.

The other Representative Trustees are:- Hon Ald. John Lines (Con), Hon Ald. Anita Ward (Lab) and Hon Ald. Sue Anderson (Lib Dem).

Therefore it is

**RECOMMENDED:-**

To re-appoint Hon Ald. Mike Sharpe (Lab) from 26 July 2022 until 25 July 2026, as Representative Trustee.





# Birmingham City Council

## Report to Cabinet

Date: 26<sup>th</sup> July 2022



**Subject:** **PLANNED PROCUREMENT ACTIVITIES (AUGUST 2022 – OCTOBER 2022)**

**Report of:** **ASSISTANT DIRECTOR – PROCUREMENT**

**Relevant Cabinet Member:** **Councillor Yvonne Mosquito, Finance and Resources**

**Relevant O &S Chair(s):** **Councillor Akhlaq Ahmed, Chair of Resources O & S**

**Report author:** Steve Sandercock, Assistant Director, Procurement  
Email Address: [steve.sandercock@birmingham.gov.uk](mailto:steve.sandercock@birmingham.gov.uk)

Are specific wards affected?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No – All wards affected
If yes, name(s) of ward(s):		
Is this a key decision?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
If relevant, add Forward Plan Reference:		
Is the decision eligible for call-in?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No
Does the report contain confidential or exempt information?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No
If relevant, provide exempt information paragraph number or reason if confidential :		
3. Information relating to the financial or business affairs of any particular person (including the council)		

### 1 Executive Summary

- 1.1 This report provides details of the planned procurement activity for the period August 2022 – October 2022. Planned procurement activities reported previously are not repeated in this report.
- 1.2 The report enables Cabinet to identify whether any reports for procurement activities should be brought to this meeting for specific executive decision,

otherwise they will be dealt with under Chief Officer delegations up to the value of £10m, unless TUPE applies to current Council staff.

## **2 Recommendations**

- 2.1 Notes the planned procurement activities under chief officer delegations set out in the Constitution for the period August 2022 – October 2022 as detailed in Appendix 1.

## **3 Background**

- 3.1 At the 12<sup>th</sup> July 2022 meeting of Council changes to procurement governance were agreed which gives Chief Officers the delegated authority to approve procurement contracts up to the value of £10m over the life of the contract. Where it is likely that the award of a contract will result in staff employed by the Council transferring to the successful contract under TUPE, the contract award decision has to be made by Cabinet.
- 3.2 In line with the Procurement and Contract Rules that form part of the Council's Constitution, this report acts as the process to consult with and take soundings from Cabinet Members and the Resources Overview & Scrutiny Committee.
- 3.3 This report sets out the planned procurement activity over the next few months where the contract value is between the procurement threshold £177,897.50 (excluding VAT) and £10m (excluding VAT). This will give members visibility of all procurement activity within these thresholds and the opportunity to identify whether any procurement reports should be brought to Cabinet for approval even though they are below the £10m delegation threshold.
- 3.4 It should be noted that the procurement threshold has changed from £189,330 to £177,897.50 (excluding VAT) and applies from 1st January 2022 for a period of 2 years.
- 3.5 Individual procurements may be referred to Cabinet for an executive decision at the request of Cabinet, a Cabinet Member or the Chair of Resources Overview & Scrutiny Committee where there are sensitivities or requirements that necessitate a decision being made by Cabinet.
- 3.6 Procurements below £10m contract value that are not listed on this or subsequent monthly reports can only be delegated to Chief Officers if specific approval is sought from Cabinet. Procurements above £10m contract value will still require an individual report to Cabinet in order for the award decision to be delegated to Chief Officers if appropriate.
- 3.7 A briefing note with details for each item to be procured is listed in Appendix 2. The financial information for each item is detailed in Appendix 3 – Exempt Information.

## **4 Options considered and Recommended Proposal**

4.1 The report approved by Council Business Management Committee on 16 February 2016 set out the case for introducing this process. The options considered are:

- To refer the procurement strategy and contract award of individual procurements to Cabinet for decision.
- To continue with the existing process – this is the recommended option

## **5 Consultation / Engagement**

5.1 This report to Cabinet is copied to Cabinet Support Officers and to Resources Overview & Scrutiny Committee and therefore is the process for consulting with relevant cabinet and scrutiny members. At the point of submitting this report Cabinet Members/ Resources Overview & Scrutiny Committee Chair have not indicated that any of the planned procurement activity needs to be brought back to Cabinet for executive decision.

## **6 Risk Management**

6.1 Details of Risk Management, Community Cohesion and Equality Act requirements will be set out in the individual reports.

## **7 Compliance Issues:**

### **7.1 How are the recommended decisions consistent with the City Council's priorities, plans and strategies?**

7.1.1 Details of how the contracts listed in Appendix 1 and Appendix 2 support relevant Council policies, plans or strategies, will be set out in the individual reports.

### **7.2 Legal Implications**

7.2.1 Details of all relevant implications will be included in individual reports.

### **7.3 Financial Implications**

7.3.1 Details of how decisions will be carried out within existing finances and resources will be set out in the individual reports.

7.3.2 Any cashable savings generated as a result of the procurement exercises are detailed in Appendix 2 to the delivery of procurement related savings and be removed from Directorate where identified in addition to the existing service area savings target as set out in the MTFP in line with the principles to treatment of identified savings against third party contracts as agreed by CLT on 24th January 2022.

#### **7.4 Procurement Implications (if required)**

7.4.1 This is a procurement report and the implications are detailed in the appendices

#### **7.5 Human Resources Implications (if required)**

7.5.1 None.

#### **7.6 Public Sector Equality Duty**

7.6.1 Details of Risk Management, Community Cohesion and Equality Act requirements will be set out in the individual reports.

### **8 Background Documents**

8.1 List of Appendices accompanying this Report (if any):

- 1. Appendix 1 - Planned Procurement Activity August 2022 – October 2022
- 2. Appendix 2 – Background Briefing Paper
- 3. Appendix 3 – Exempt Information
- 4. Appendix 4 - Notification of Minor Amendments



## APPENDIX 1 – PLANNED PROCUREMENT ACTIVITIES (AUGUST 2022 – OCTOBER 2022)

Type of Report	Title of Procurement	Ref	Brief Description	Contract Duration	Directorate	Portfolio Finance and Resources Plus	Finance Officer	Contact Name	Planned CO Decision Date
Approval to Tender Strategy	New Learning Solution for BCC & BCT Learning & Development (LMS)	TBC	The aim of the procurement is for a one single, consolidated learning management system that provides a comprehensive learning offer to its employees whilst also having the ability to trade the same offer with a level of reporting to an external audience.	2 years with option to extend for 1 year	Digital and Customer Services	Digital, Culture, Heritage & Tourism	Lee Bickerton	Sharon Lewies / Fiona Burton	12/09/2022
Strategy / Award	City Housing Consultancy Support	TBC	The City Housing Transformation Programme and the review of Housing Management have identified 100 plus improvements and tasks as part of the initial review commissioned to transform City Housing and become "Best in Class".	1 year	City Housing	Housing	Andrew Healey	Bill Pickbourn / Dean Billingham	22/08/2022
Approval to Tender Strategy	Dynamic Purchasing System for the Provision of Temporary Accommodation	TBC	Work with the private sector to secure temporary accommodation solutions to support the Council's statutory duty to provide temporary accommodation to vulnerable households under the Housing Act 1996, the Homelessness Act 2002 and the Homeless Reduction Act 2017.	2 years with the option to extend for a further 2 years	City Housing	Housing	Andrew Healey	Jayne Baylis / Lucy Ford	22/08/2022
Approval to Tender Strategy	Administration and Resources for Department of Works and Pensions Initiatives	TBC	There is an unprecedented amount of demand on the Benefit Service in the number of applications for housing benefit and council tax support, applications for Local Welfare Provision (400% increase), isolation payments and crisis applications due to the impact of the cost of living fuel prices, impact from covid and DWP initiatives.	3 years with an option to extend for 1 year	Council Management	Finance and Resources	Lee Bickerton	David Kinnair / Stuart Follows	19/09/2022
Approval to Tender Strategy	Public Health NHS Health Check and Smoking Cessation Enhanced Services	TBC	NHS Health Checks (Mandated Service): Currently provided by GPs. Health check-up for adults in England aged 40 to 74, designed to spot early signs of stroke, kidney disease, heart disease, type 2 diabetes, or dementia Smoking Cessation: The current Smoking Cessation services provided on behalf of Birmingham City Council are delivered by 112 GPs and 121 pharmacies. To access the services the service user must be over the age of 12 years, work, live, study, or have a GP practice located in Birmingham.	2 years with an option to extend for a further 2 years.	Public Health	Health and Social Care	Lee Bickerton	Juliet Grainger/ Sandra Asiedu	01/11/2022
Approval to Tender Strategy	Smoking Cessation Digital App	TBC	The requirement: •a peer support network for smokers wanting to quit •pharmacological & behavioural support •face-to-face consultations through Video Calling •24/7 remote brief intervention resource that Pharmacies, GP Practices, Maternity Services can use alongside the core smoking cessation service	2 years with an option to extend for a further 2 years.	Public Health	Health and Social Care	Lee Bickerton	Juliet Grainger/ Sandra Asiedu	01/11/2022
Strategy / Award	Primrose Park Landscape Construction Works	TBC	The works consist of the creation of new neighbourhood park in Primrose Estate Regeneration Area including a play area, outdoor gym, games court, picnic area, art feature, entrance features, boundary railings and planting.	Up to 1 year	City Operations	Environment	Carl Tomlinson	Robert Churn / Charlie Short	01/11/2022
Strategy / Award	Provision of a Children's Placement Portal	TBC	Birmingham Children's Trust require a partner to build a new Placement Portal for managing child placements . A test of the market has suggested that there is currently a gap in regard to this type of system being immediately available.	1 year with option to extend by a further 1 year	Digital and Customer Services	Digital, Culture, Heritage & Tourism	Lee Bickerton	James Gregory / James Parris	22/08/2022
Strategy / Award	Construction Professional Services for the Alexander Stadium	TBC	To support the reinstatement of the Alexander Stadium site to operate as a functional community and events facility to support the legacy from the Commonwealth Games 2022, there is a requirement for construction professional services for the works.	2 years	City Operations	Leader	Guy Olivant	Dave Wagg / Charlie Short	01/11/2022
Strategy / Award	Cycle to Work Salary Sacrifice - Amendmenet	TBC	There is a requirement for the provision of bicycles in line with the Birmingham Cycle to Work salary sacrifice scheme.	4 years	Council Management	Finance and Resources	Lee Bickerton	Selina Erfani / Richard Tibbatts	22/08/2022

## **APPENDIX 2**

### **BRIEFING NOTE ON PLANNED PROCUREMENT ACTIVITIES** **CABINET – 26<sup>th</sup> July 2022**

<b>Title of Contract</b>	<b>New Learning Solution for BCC &amp; BCT Learning &amp; Development (LMS)</b>
<b>Contact Officers</b>	<b>Director / Assistant Director:</b> Cheryl Doran, AD IT & Digital Services <b>Client Officer:</b> Fiona Burton, People Strategy Manager <b>Procurement Officer:</b> Sharon Lewies – ICT Commissioning Manager
Briefly describe the service required	The aim of the procurement is for a one single, consolidated learning management system that provides a comprehensive learning offer to its employees whilst also having the ability to trade the same offer with a level of reporting to an external audience.
What is the proposed procurement route?	The route to market will be via the Council's e-procurement portal using the restricted procurement procedure, Find a Tender (Contracts Finder), deemed best and fit for purpose at point of going out to competition.
What are the existing arrangements? Is there an existing contract? If so when does that expire?	There are 2 existing contractual commitments across People Services and Adult Social Care which will end in February 2023.
Will any savings be generated?	Any cashable savings generated will contribute to the existing service area savings target. Additional to savings against budget, there is the opportunity for revenue generation via external audience (income generation).  This is a new requirement, which will include replacement of some lower value contracts.
If single /multiple contractor negotiations are proposed, what is the reason for not tendering the requirement, how do we ensure value for money and compliance with the Birmingham Business Charter for Social Responsibility (BBC4SR)?	Not applicable.
Has the In-House Preferred Test been carried out?	Yes, and the test demonstrated this is not suitable to be carried out in-house as there is not the resources within the Council to provide this service.
How will this service assist with the Council's commitments to Route to Zero?	Supporting carbon reduction by enhancement of remote learning capacity, reducing travel into Birmingham central hub. This activity supports the Council's objective to utilise ICT as part of the modern workplace programme,
Is the Council under a statutory duty to provide this service? If not, what is the justification for providing it?	This service will support both statutory and non-statutory development/role related training. The justification is efficiency of service.
What budget is the funding from for this service?	This is funded from People Services and Adult Social Care.
Proposed start date and duration of the new contract	The proposed start date is 1 <sup>st</sup> October 2022 (to cover implementation prior to existing contracts ending in February 2023) for a period of 2 years with an optional extension of 1 year.

<b>Title of Contract</b>	<b>City Housing Consultancy Support</b>
<b>Contact Officers</b>	<b>Director / Assistant Director</b> – Julie Griffin, Strategic Director – Housing <b>Programme Director / Client Officer:</b> Bill Pickbourn <b>Procurement Officer:</b> Dean Billingham, Assistant Category Manager
Briefly describe the service required	<p>The City Housing Transformation Programme and the review of Housing Management have identified 100 plus improvements and tasks as part of the initial review commissioned to transform City Housing and become “Best in Class”.</p> <p>Project teams have now been established, however, to meet the programme timescales, deliver the objectives and have the ability to respond to new requirements quickly, there is a need to have access to consultancy capacity which will often be required at short notice or to allow time for internal resources to be secured. City Housing, therefore, requires access to a mix of resources to deliver the different assignments over the next 12 months. Approval is requested to put a flexible arrangement in place, to enable resources to be drawn down as and when required in a planned and responsive manner, against approved business cases or project briefs.</p>
What is the proposed procurement route?	YPO 940 Managing Consultancy and Professional Services or ESPO Consultancy Services PCR15 compliant frameworks.
What are the existing arrangements? Is there an existing contract? If so when does that expire?	The existing contract with current consultants 40C expires in September 2022.
Will any savings be generated?	No cashable savings will be generated by this project.
If single /multiple contractor negotiations are proposed, what is the reason for not tendering the requirement, how do we ensure value for money and compliance with the Birmingham Business Charter for Social Responsibility (BBC4SR)?	Not applicable.
Has the In-House Preferred Test been carried out?	In-house test has not been carried out due to lack of suitably skilled resources to undertake this activity within the Directorate. In addition, the review needs to be taken by an independent organisation.
How will this service assist with the Council’s commitments to Route to Zero?	As this is a Consultancy Service that will be predominately carried out remotely, there is a net zero footprint for delivery of this service.
Is the Council under a statutory duty to provide this service? If not, what is the justification for providing it?	There is not a statutory duty to provide this service. However, the service is required to provide assurance that the Housing Service is designed as a best in class function.
What budget is the funding from for this service?	This is funded from HRA budget.
Proposed start date and duration of the new contract	The proposed start date is August 2022 for a period of up to 12 months.

<b>Title of Contract</b>	<b>Dynamic Purchasing System for the Provision of Temporary Accommodation</b>
<b>Contact Officers</b>	<b>Director / Assistant Director:</b> Julie Griffin, Strategic Director - Housing <b>Client Officer:</b> Jayne Baylis, Modernisation And Strategic Manager <b>Procurement Officer:</b> Lucy Ford, Sub-Category Manager
Briefly describe the service required	Work with the private sector to secure temporary accommodation solutions to support the Council's statutory duty to provide temporary accommodation to vulnerable households under the Housing Act 1996, the Homelessness Act 2002 and the Homeless Reduction Act 2017.
What is the proposed procurement route?	To establish a Dynamic Purchasing System (DPS) pilot that will be subject to the Public Contracts Regulations 2015.
What are the existing arrangements? Is there an existing contract? If so when does that expire?	This DPS, which was originally approved by Cabinet November 2020 along with the recently awarded block contracts, will ultimately replace the current PSL framework for temporary accommodation. The framework expires on the 31st July 2022. This DPS pilot will support the urgent need for additional ad hoc temporary accommodation requirements beyond the block contracts recently awarded. The DPS will also reduce the reliance upon ad-hoc expensive bed and breakfast emergency accommodation.
Will any savings be generated?	No cashable savings will be generated by this project. However, this route to market will support the reduction in bed and breakfast accommodation usage which is more expensive.
If single /multiple contractor negotiations are proposed, what is the reason for not tendering the requirement, how do we ensure value for money and compliance with the Birmingham Business Charter for Social Responsibility (BBC4SR)?	Not applicable.
Has the In-House Preferred Test been carried out?	Yes, and the test demonstrated this is not suitable to be carried out in-house as there is not the resources within the Council to provide this service.
How will this service assist with the Council's commitments to Route to Zero?	We would aim to attract properties which locate service users close to their place of work/schools.
Is the Council under a statutory duty to provide this service? If not, what is the justification for providing it?	The Council has a statutory duty to provide temporary accommodation to vulnerable households under the Housing Act 1996, the Homelessness Act 2002 and the Homeless Reduction Act 2017.
What budget is the funding from for this service?	This is funded from existing PSL and Bed & Breakfast temporary accommodation budget.
Proposed start date and duration of the new contract	The proposed start date is September 2022 for a period of two years with the option to extend for a further two years in yearly increments.

<b>Title of Contract</b>	<b>Administration and Resources for Department of Works and Pensions Initiatives</b>
<b>Contact Officers</b>	<b>Director / Assistant Director:</b> Tim Savill – Assistant Director <b>Client Officer:</b> David Kinnair – Head of Benefit Service <b>Procurement Officer:</b> Stuart Follows – Assistant Category Manager
Briefly describe the service required	There is an unprecedented amount of demand on the Benefit Service in the number of applications for housing benefit and council tax support, applications for Local Welfare Provision (400% increase), isolation payments and crisis applications due to the impact of the cost of living fuel prices, impact from covid and DWP initiatives. This is not of the Council's making and leaves the service unable to deal with the increased demand and backlog of applicants who are not receiving their housing benefit/council tax support or local welfare. The Council requires a long-term partner who have resource that is suitably skilled and experienced and available to deliver the service on the tasks required as and when needed.
What is the proposed procurement route?	A procurement process will be undertaken advertised on Find a Tender, Contracts Finder and <a href="http://www.finditinbirmingham.com">www.finditinbirmingham.com</a>
What are the existing arrangements? Is there an existing contract? If so when does that expire?	There is an existing contract in place until 30 <sup>th</sup> September 2022 with Nottingham Revenue and Benefits Ltd.
Will any savings be generated?	No cashable savings will be generated by this project. This is additional resource required to support the customer service delivery.
If single /multiple contractor negotiations are proposed, what is the reason for not tendering the requirement, how do we ensure value for money and compliance with the Birmingham Business Charter for Social Responsibility (BBC4SR)?	A contract with Nottingham Revenue and Benefits Ltd will need to be awarded by way of an SCN from 1st October 2022 until Jan 2023 . This allowing for the ongoing resource benefit support needed whilst a compliant tender process is carried out for a longer-term partner and also allowing for time required for the awarded supplier staff resource to be provided system access, training and clearance to all security measures and applications.  The contract value by way of the SCN for 4 months falls below the threshold for BBC4SR. Although payment of the Real Living Wage will be required.
Has the In-House Preferred Test been carried out?	Yes, and the test demonstrated this is not suitable to be carried out in-house for the period of this contract.
How will this service assist with the Council's commitments to Route to Zero?	Any specification will require the Council's commitments to Route to Zero to be considered, in particular to a reduction in zero emission for transport.
Is the Council under a statutory duty to provide this service? If not, what is the justification for providing it?	Failure to provide this service would result in the Council not being able to discharge its statutory duties.
What budget is the funding from for this service?	This will be funded from the Department for Work and Pensions.
Proposed start date and duration of the new contract	The proposed start date, following a compliant tender process, is January 2023 for a period of 3 years with an option to extend for 12 months.



<b>Title of Contract</b>	<b>Public Health NHS Health Check and Smoking Cessation Enhanced Services</b>
<b>Contact Officers</b>	<b>Director / Assistant Director:</b> Dr Justin Varney, Director Public Health <b>Client Officer:</b> Juliet Grainger, Service Lead (Adults) <b>Procurement Officer:</b> Sandra Asiedu, Assistant Category Manager
Briefly describe the service required	<b>NHS Health Checks (Mandated Service):</b> Currently provided by GPs. A 5 yearly health check-up for adults in England aged 40 to 74, designed to spot early signs of stroke, kidney disease, heart disease, type 2 diabetes, or dementia <b>Smoking Cessation:</b> The current Smoking Cessation services provided on behalf of Birmingham City Council are delivered by 112 GPs and 121 pharmacies. To access the services the service user must be over the age of 12 years, work, live, study, or have a GP practice located in Birmingham.
What is the proposed procurement route	To establish a Dynamic Purchasing System (DPS) for smoking cessation and NHS Health Checks.
What are the existing arrangements? Is there an existing contract? If so when does that expire?	Current contracts with GPs and Pharmacies for NHS Health Checks and Smoking Cessation expire in May 2023.
Will any savings be generated?	No cashable savings will be generated by this project however the payment structure is payment by results which is currently capped to reduce the risk of overspend.
If single /multiple contractor negotiations are proposed, what is the reason for not tendering the requirement, how do we ensure value for money and compliance with the Birmingham Business Charter for Social Responsibility (BBC4SR)?	Not applicable.
Has the In-House Preferred Test been carried out?	Yes, and the test demonstrated this is not suitable to be carried out in-house as the Council does not have the capacity, equipment and locality facilities required to deliver these services in the community or generate NHS referrals that may be required because of health screening
How will this service assist with the Council's commitments to Route to Zero?	Providing services across the city in each locality contributes to reducing the Cities carbon footprint to zero
Is the Council under a statutory duty to provide this service? If not, what is the justification for providing it?	There is a statutory duty to provide NHS Health Checks as a mandated service under the public health grant conditions.  Smoking Cessation (non-mandated): Smoking is a major risk factor for chronic diseases and premature deaths in Birmingham. National data indicates that Birmingham has higher rates of smoking related mortality at 230 deaths per 100,000 compared with West Midlands and England averages at 204 and 202 per 100,000 respectively
What budget is the funding from for this service?	This is funded from budgets: B1-AV0KZ--E00-JZZZZZ-TV5KL-JZZZ-JXXX B1-AV0KZ--E00-JZZZZZ-TV5L0-JZZZ-JXXX
Proposed start date and duration of the new contract	The proposed start date is 1st June 2023 for a period of 2 years with an option to extend for a further 2 years.

<b>Title of Contract</b>	<b>Smoking Cessation Digital App</b>
<b>Contact Officers</b>	<b>Director / Assistant Director:</b> Dr Justin Varney, Director Public Health <b>Client Officer:</b> Juliet Grainger, Service Lead (Adults) <b>Procurement Officer:</b> Sandra Asiedu, Assistant Category Manager
Briefly describe the service required	Artificial Intelligence for stop smoking services can reach individuals who cannot commit to weekly/fortnightly smoking cessation meetings due to personal and work commitments.  The requirement: <ul style="list-style-type: none"> <li>• a peer support network for smokers wanting to quit</li> <li>• pharmacological &amp; behavioural support</li> <li>• face-to-face consultations through Video Calling</li> <li>• 24/7 remote brief intervention resource that Pharmacies, GP Practices, Maternity Services can use alongside the core smoking cessation service</li> </ul>
What is the proposed procurement route?	To be advertised on Find a Tender, Contracts Finder and <a href="http://www.finditinbirmingham.com">www.finditinbirmingham.com</a>
What are the existing arrangements? Is there an existing contract? If so when does that expire?	The current App based solution (Quit with Bella) provided by Solutions4Health from 1 July 2021 will expire in May 2023.
Will any savings be generated?	No cashable savings will be generated by this project.
If single /multiple contractor negotiations are proposed, what is the reason for not tendering the requirement, how do we ensure value for money and compliance with the Birmingham Business Charter for Social Responsibility (BBC4SR)?	Not applicable.
Has the In-House Preferred Test been carried out?	Yes, and the test demonstrated this is not suitable to be carried out in-house. Up to date technology, marketing reach and reduced costs can be better achieved via the market
How will this service assist with the Council's commitments to Route to Zero?	The service is a digital app that Birmingham residents can download to any electronic device. It does not have a carbon footprint.
Is the Council under a statutory duty to provide this service? If not, what is the justification for providing it?	There is not a statutory duty to provide this service. However, the current service, Quit with Bella, allows us to provide increased patient choice/access to smoking cessation support. This is important as national data indicates that Birmingham has higher rates of smoking related mortality at 230 deaths per 100,000 compared with West Midlands and England averages at 204 and 202 per 100,000 respectively.
What budget is the funding from for this service?	This is funded from budget. B1-AV0KZ--E00-JZZZZZ-TV5L0-JZZZ-JXXX
Proposed start date and duration of the new contract	The proposed start date is 1st June 2023 for a period of 2 years with an option to extend for a further 2 years.

<b>Title of Contract</b>	<b>Primrose Park Landscape Construction Works</b>
Director / Assistant Director	<b>Director:</b> Rob James – Strategic Director of City Operations <b>Client Officer:</b> Robert Churn, Head of Landscape and Development <b>Procurement Officer:</b> Charlie Short, Sub-Category Manager
Briefly describe the service required	<p>Cabinet approved the Full Business Case for the regeneration of the Kings Norton Primrose Estate including the creation of a new neighbourhood park on 27<sup>th</sup> July 2015. This approved the delegation of the procurement strategy to the Deputy Leader and the then Cabinet Member for Commissioning, Contracting and Improvement jointly with the then Interim Strategic Director of Place. Since, the Constitution has changed with the Cabinet Member now not having the approval for a procurement activity</p> <p>The works consist of the creation of new neighbourhood park in Primrose Estate Regeneration Area including a play area, outdoor gym, games court, picnic area, art feature, entrance features, boundary railings and planting.</p>
What is the proposed procurement route?	A further competition exercise using the Council's Landscape Construction Framework Agreement will be carried out.
What are the existing arrangements? Is there an existing contract? If so when does that expire?	This is a new requirement.
Will any savings be generated?	No cashable savings will be generated by this project.
If single /multiple contractor negotiations are proposed, what is the reason for not tendering the requirement, how do we ensure value for money and compliance with the Birmingham Business Charter for Social Responsibility (BBC4SR)?	Not applicable.
Has the In-House Preferred Test been carried out?	Yes, and the test demonstrated this is not suitable to be carried out in-house.
How will this service assist with the Council's commitments to Route to Zero?	Taking a whole place approach, the creation of a new neighbourhood park with natural green space and tree planting will help to deliver the ambitions set out in the Carbon Roadmap, where the City Council is committed to a 60% carbon reduction by 2027. The proposals will help to deliver the Birmingham and Black Country Nature Improvement Area action plan targets and help meet the policy commitments in the Council's emerging City of Nature Strategy and its global Biophilic City commitments.
Is the Council under a statutory duty to provide this service? If not, what is the justification for providing it?	There is not a statutory duty for these works. However, the works support a high and safe standard green space. This is reflected in the 2010 Planning Framework documents and meets current planning policy aimed at providing adequate public open space for new residents of Kings Norton Primrose Estate.
What budget is the funding from for this service?	The development and delivery cost of this new park will be funded from capital receipts from property sales from this development, the Local Growth Fund and Housing Revenue contributions.
Proposed start date and duration of the new contract	The proposed start date is January 2023 for a duration of up to 12 months.

<b>Title of Contract</b>	<b>Provision of a Children's Placement Portal</b>
<b>Contact Officers</b>	<b>Director / Assistant Director:</b> Cheryl Doran, AD IT & Digital Services <b>Client Officer:</b> James Gregory - Head of ICT Programme <b>Procurement Officer:</b> Jamie Parris – Lead IT Commissioning Manager
Briefly describe the service required	Birmingham Children's Trust require a partner to build a new Placement Portal for managing child placements . A test of the market has suggested that there is currently a gap in regard to this type of system being immediately available. Therefore, a supplier with the expertise to build a brand-new application is required.
What is the proposed procurement route?	The proposed route to market will be via an appropriate Crown Commercial Services National Framework Agreement and Lot.
What are the existing arrangements? Is there an existing contract? If so when does that expire?	There is no contract in place at present.
Will any savings be generated?	Any savings opportunities are still to be confirmed.
If single /multiple contractor negotiations is proposed, what is the reason for not tendering the requirement, how do we ensure value for money and compliance with the Birmingham Business Charter for Social Responsibility (BBC4SR)?	Not applicable.
Has the In-House Preferred Test been carried out?	Yes – the capacity and capability does not yet exist in BCC to build this application.
How will this service assist with the Council's commitments to Route to Zero?	The proposed solution aims to digitise forms and paperwork which is currently held manually.
Is the Council under a statutory duty to provide this service? If not, what is the justification for providing it?	The placements portal is business critical and supports statutory responsibilities for children in care placements.
What budget is the funding from for this service?	The portal will be funded equally by 14 LAs. The aim is to secure DLUHC Digital funding in the first instance.
Proposed start date and duration of the new contract	The proposed start date following procurement is expected to fall within Q3 2022/23 and be for a period of 12 months with option to extend by a further 12 months until the build has been completed and deployed.

<b>Title of Contract</b>	<b>Construction Professional Services for the Alexander Stadium</b>
Director / Assistant Director	<b>Director:</b> Rob James – Strategic Director of City Operations <b>Client Officer:</b> Dave Wagg, Head of Sport and Physical Activity <b>Procurement Officer:</b> Charlie Short, Sub-Category Manager
Briefly describe the service required	To support the reinstatement of the Alexander Stadium site to operate as a functional community and events facility to support the legacy from the Commonwealth Games 2022, there is a requirement for construction professional services for the works.  The services include: <ul style="list-style-type: none"> <li>• Project Management</li> <li>• Cost control</li> <li>• Design</li> <li>• Clerk of Works</li> </ul>
What is the proposed procurement route?	A further competition exercise using the Crown Commercial Service Construction Professional Services Framework Agreement will be carried out. Depending on the fit between the service requirements and the works specifications for individual lots on the framework, this will be delivered through up to three separate processes.
What are the existing arrangements? Is there an existing contract? If so when does that expire?	This is a new requirement.
Will any savings be generated?	No cashable savings will be generated by this project.
If single /multiple contractor negotiations are proposed, what is the reason for not tendering the requirement, how do we ensure value for money and compliance with the Birmingham Business Charter for Social Responsibility (BBC4SR)?	Not applicable.
Has the In-House Preferred Test been carried out?	Yes, and the test demonstrated this is not suitable to be carried out in-house as there are not the skills or capability within the Council for this service.
How will this service assist with the Council's commitments to Route to Zero?	The specification will require the bidders to deliver the service in way that reduces or eliminates their carbon footprint.
Is the Council under a statutory duty to provide this service? If not, what is the justification for providing it?	There is not a statutory duty for this service. However, it will support the reinstatement work for one of the Council's major assets to build up the legacy from hosting the Commonwealth Games 2022.
What budget is the funding from for this service?	The service will be funded from the approved Alexander Stadium budget.
Proposed start date and duration of the new contract	The proposed start date is October 2022 for a duration of 2 years.



## **APPENDIX 4**

### Notification of Minor Amendments

This appendix notes there is an amendment to the proposed procurement route previously agreed by Cabinet in 7<sup>th</sup> June 2022. The change to the revised PPAR highlights the changes made to the original and revised PPAR items below for reference.

<b>Title of Contract</b>	<b>Cycle to Work Salary Sacrifice</b>
<b>Contact Officers</b>	<b>Director / Assistant Director:</b> Darren Hockaday, Director, HR and Organisation Development (interim) <b>Client Officer:</b> Selina Erfani, Senior Job Evaluation & Research Officer, HR and Organisation Development <b>Procurement Officer:</b> Richard Tibbatts, Head of Category - Corporate
Briefly describe the service required	There is a requirement for the provision of bicycles in line with the Birmingham Cycle to Work salary sacrifice scheme.
What is the proposed procurement route?	To carry out further competition exercises using the Eastern Shires Purchasing Organisation (ESPO) Staff benefits framework agreement (319).
What are the existing arrangements? Is there an existing contract? If so when does that expire?	There is not a current contract in place. The existing contract expired 31 <sup>st</sup> July 2021. Due to staff shortages and movements within the team it was not possible to re-procure this in time. However, the services have continued to be provided by Halfords under the contractual arrangements.
Will any savings be generated?	As the bicycles are purchased from employees' salaries, there will be no savings to the revenue budget as a result of this procurement exercise.
If single /multiple contractor negotiations are proposed, what is the reason for not tendering the requirement, how do we ensure value for money and compliance with the Birmingham Business Charter for Social Responsibility (BBC4SR)?	Not applicable.
Has the In-House Preferred Test been carried out?	Yes, and the test demonstrated this is not suitable to be carried out in-house as there is not the capacity within the Council to provide bicycles.
How will this service assist with the Council's commitments to Route to Zero?	The service will support the Birmingham Transport Plan aspiration to promote public transport and active travel.
Is the Council under a statutory duty to provide this service? If not, what is the justification for providing it?	There is not a statutory duty for these services. However, the cycle to work scheme encourages employees to develop a healthier more active lifestyle.
What budget is the funding from for this service?	This is funded from the salary sacrifice scheme budget B1 AV0KB 5DR0 DMAD E00 and deductions from employee's salaries are credited to the same budget to cover the cost.
Proposed start date and duration of the new contract	The proposed start date is 1 <sup>st</sup> August 2022 for a period of 4 years.

**REVISED AMENDMENTS BELOW HIGHLIGHTED IN YELLOW:**

<b>Title of Contract</b>	<b>Cycle to Work Salary Sacrifice</b>
<b>Contact Officers</b>	<b>Director / Assistant Director:</b> Darren Hockaday, Director, HR and Organisation Development (interim) <b>Client Officer:</b> Selina Erfani, Senior Job Evaluation & Research Officer, HR and Organisation Development <b>Procurement Officer:</b> Richard Tibbatts, Head of Category - Corporate
Briefly describe the service required	There is a requirement for the provision of bicycles in line with the Birmingham Cycle to Work salary sacrifice scheme.
What is the proposed procurement route?	There is a requirement to change the procurement route from further competition to direct award. The further competition route was explored further with the ESPO framework manager. As a result, mini competition has been deemed impractical as all the framework providers submitted zero cost bids and different specifications of bicycles. This would make a consistent evaluation difficult and risk challenge. Consequently, an options appraisal will be carried out with framework providers to determine the most appropriate provider for direct award.
What are the existing arrangements? Is there an existing contract? If so when does that expire?	There is not a current contract in place. The existing contract expired 31 <sup>st</sup> July 2021. Due to staff shortages and movements within the team it was not possible to re-procure this in time. However, the services have continued to be provided by Halfords under the contractual arrangements.
Will any savings be generated?	As the bicycles are purchased from employees' salaries, there will be no savings to the revenue budget as a result of this procurement exercise.
If single /multiple contractor negotiations are proposed, what is the reason for not tendering the requirement, how do we ensure value for money and compliance with the Birmingham Business Charter for Social Responsibility (BBC4SR)?	Not applicable.
Has the In-House Preferred Test been carried out?	Yes, and the test demonstrated this is not suitable to be carried out in-house as there is not the capacity within the Council to provide bicycles.
How will this service assist with the Council's commitments to Route to Zero?	The service will support the Birmingham Transport Plan aspiration to promote public transport and active travel.
Is the Council under a statutory duty to provide this service? If not, what is the justification for providing it?	There is not a statutory duty for these services. However, the cycle to work scheme encourages employees to develop a healthier more active lifestyle.
What budget is the funding from for this service?	This is funded from the salary sacrifice scheme budget B1 AV0KB 5DR0 DMAD E00 and deductions from employee's salaries are credited to the same budget to cover the cost.
Proposed start date and duration of the new contract	The proposed start date is 1 <sup>st</sup> September 2022 for a period of 4 years.