



BROMLEY CIVIC CENTRE, STOCKWELL CLOSE, BROMLEY BRI 3UH

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DATE: 8 September 2023

To: Members of the  
**EXECUTIVE, RESOURCES AND CONTRACTS POLICY DEVELOPMENT AND  
SCRUTINY COMMITTEE**

Councillor Simon Fawthrop (Chairman)  
Councillor Robert Evans (Vice-Chairman)  
Councillors Jeremy Adams, Mark Brock, David Cartwright QFSM, Kira Gabbert,  
Julie Ireland, Simon Jeal, Ruth McGregor, Tony Owen, Will Rowlands, Shaun Slator,  
Mark Smith, Melanie Stevens and Michael Tickner

A meeting of the Executive, Resources and Contracts Policy Development and  
Scrutiny Committee will be held Bromley Civic Centre on **MONDAY 18  
SEPTEMBER 2023 AT 7.00 PM**

TASNIM SHAWKAT

Director of Corporate Services & Governance

*Copies of the documents referred to below can be obtained from  
<http://cds.bromley.gov.uk/>*

## **PART 1 AGENDA**

**Note for Members:** Members are reminded that Officer contact details are shown on each report and Members are welcome to raise questions in advance of the meeting.

### **STANDARD ITEMS**

- 1 APOLOGIES FOR ABSENCE AND NOTIFICATION OF SUBSTITUTE MEMBERS**
- 2 DECLARATIONS OF INTEREST**
- 3 QUESTIONS FROM COUNCILLORS AND MEMBERS OF THE PUBLIC ATTENDING THE MEETING**

In accordance with the Council's Constitution, members of the public may submit one question each on matters relating to the work of the Committee. Questions must have been received in writing 10 working days before the date of the meeting - by 5pm on: Monday 4 September 2023.

Questions seeking clarification of the details of a report on the agenda may be accepted within two working days of the normal publication date of the agenda – by **5pm on Tuesday 12 September 2023.**

a **QUESTIONS FOR THE CHAIRMAN OF EXECUTIVE, RESOURCES AND CONTRACTS PDS COMMITTEE**

b **QUESTIONS FOR THE RESOURCES, COMMISSIONING AND CONTRACTS MANAGEMENT PORTFOLIO HOLDER**

4 **MINUTES OF THE EXECUTIVE, RESOURCES AND CONTRACTS PDS COMMITTEE MEETING HELD ON 3 JULY 2023 (EXCLUDING EXEMPT ITEMS)** (Pages 5 - 14)

5 **MATTERS OUTSTANDING AND WORK PROGRAMME** (Pages 15 - 22)

6 **FORWARD PLAN OF KEY DECISIONS** (Pages 23 - 36)

7 **SCRUTINY OF THE CHIEF EXECUTIVE** (Pages 37 - 50)

**HOLDING THE RESOURCES, COMMISSIONING AND CONTRACTS PORTFOLIO HOLDER TO ACCOUNT**

8 **RESOURCES, COMMISSIONING AND CONTRACTS MANAGEMENT PORTFOLIO - PRE-DECISION SCRUTINY**

Portfolio Holder decisions for pre-decision scrutiny.

a **CAPITAL PROGRAMME MONITORING - 1ST QUARTER 2022/23** (Pages 51 - 60)

**HOLDING THE EXECUTIVE TO ACCOUNT**

9 **PRE-DECISION SCRUTINY OF EXECUTIVE REPORTS**

Members of the Committee are requested to bring their copy of the agenda for the Executive meeting on 20 September 2023:

The Executive, Resources and Contracts PDS Committee will be looking at the following items on the Executive Agenda:

(5) BUDGET MONITORING 2023/24

(6) CAPITAL PROGRAMME MONITORING 2023/24

(7) OFFICE FOR LOCAL GOVERNMENT AND THE LOCAL AUTHORITY DATA EXPLORER

(8) AWARD OF CONTRACT FOR WORK AT NEW CIVIC OFFICES

(9) BIGGIN HILL NOISE ACTION PLAN UPDATE

(10) HOUSING DELIVERY UPDATE

(13) HOMES FOR UKRAINE QUARTERLY UPDATE REPORT

(14) CHURCHILL THEATRE & CENTRAL LIBRARY BUILDING, HIGH STREET, BROMLEY BR1 3UH (Please note, this item was withdrawn prior to publication of the Executive agenda)

**10 POLICY DEVELOPMENT AND OTHER ITEMS**

- a **COUNCIL MOTION- -DIGITAL INCLUSION**\_(Pages 61 - 86)
- b **CONTRACT REGISTER AND CONTRACTS DATABASE**  
(Part 1 report and appendix available online only)

**PART 2 AGENDA**

**11 LOCAL GOVERNMENT ACT 1972 AS AMENDED BY THE LOCAL GOVERNMENT (ACCESS TO INFORMATION) (VARIATION) ORDER 2006, AND THE FREEDOM OF INFORMATION ACT 2000**

The Chairman to move that the Press and public be excluded during consideration of the items of business listed below as 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.

**Items of Business**

**Schedule 12A Description**

**12 PRE-DECISION SCRUTINY OF EXEMPT RESOURCES, COMMISSIONING AND CONTRACTS PORTFOLIO HOLDER REPORTS**

**13 PRE-DECISION SCRUTINY OF EXEMPT EXECUTIVE REPORTS**

The Executive, Resources and Contracts PDS Committee will be looking at the following items on the Executive Agenda:

- (25) PART 2: AWARD OF CONTRACT FOR WORK AT NEW CIVIC OFFICES
- (26) PART 2: CHURCHILL THEATRE & CENTRAL LIBRARY BUILDING, HIGH STREET, BROMLEY BR1 3UH (Please note, this item was withdrawn prior to publication of the Executive agenda)

**14 PART 2 CONTRACT REGISTER AND CONTRACTS DATABASE (Pages 87 - 108)**

Information relating to the financial or business affairs of any particular person (including the authority holding that information)

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## **EXECUTIVE, RESOURCES AND CONTRACTS POLICY DEVELOPMENT AND SCRUTINY COMMITTEE**

Minutes of the meeting held at 7.00 pm on 3 July 2023

### **Present:**

Councillor Simon Fawthrop (Chairman)  
Councillor Robert Evans (Vice-Chairman)  
Councillors Jeremy Adams, Mark Brock, Kira Gabbert,  
Alisa Igoe, Julie Ireland, Simon Jeal, David Jefferys,  
Keith Onslow, Will Rowlands, Shaun Slator, Mark Smith  
and Melanie Stevens

### **Also Present:**

Councillor Christopher Marlow, Portfolio Holder for Resources,  
Commissioning and Contracts Management

Councillor Michael Tickner

### **13 APOLOGIES FOR ABSENCE AND NOTIFICATION OF SUBSTITUTE MEMBERS**

Apologies for absence were received from Councillors Cartwright, McGregor and Owen. Councillors Onslow, Igoe and Jefferys attended as their respective substitutes.

### **14 DECLARATIONS OF INTEREST**

Councillors Gabbert and Ireland declared that, as hosts of Ukrainian families, they were in receipt of the Ukraine Fund.

### **15 QUESTIONS FROM COUNCILLORS AND MEMBERS OF THE PUBLIC ATTENDING THE MEETING**

No questions were received.

### **16 MINUTES OF THE EXECUTIVE, RESOURCES AND CONTRACTS PDS COMMITTEE MEETING HELD ON 15 MAY 2023 (EXCLUDING EXEMPT ITEMS)**

The minutes of the Executive, Resources and Contracts PDS Committee meeting held on 15 May 2023 (excluding exempt information), were agreed and signed as a correct record.

**17 MATTERS OUTSTANDING AND WORK PROGRAMME  
Report CSD23070**

The report dealt with the Committee's business management including matters outstanding from previous meetings and the proposed work plan for the remainder of the year.

The Committee noted that the matter outstanding concerning Risk Management had now been closed. Follow up information had been provided and no further meetings had been arranged.

The Chairman reported that he had taken the decision to cancel the meeting that had been scheduled to take place on 7<sup>th</sup> August 2023.

**RESOLVED: That**

- 1. Progress on matters arising from previous meetings be noted; and**
- 2. The 2023/24 work programme be noted.**

**18 FORWARD PLAN OF KEY DECISIONS**

The Committee noted the Forward Plan of Key Decisions covering the period June 2023-September 2023.

**19 SCRUTINY OF THE PORTFOLIO HOLDER FOR RESOURCES,  
COMMISSIONING AND CONTRACTS MANAGEMENT**

The Portfolio Holder for Resources, Commissioning and Contracts Management, Councillor Christopher Marlow, attended the meeting to respond to questions from the Committee. Councillor Marlow had previously circulated a written update to the Committee outlining activity across the Portfolio. The Portfolio Holder then responded to questions, making the following comments:

- An update on Biggin Hill would be presented to the Committee in the Autumn and would be included on the next Forward Plan.
- Savings relating to temporary accommodation had been built into the budget. Borrowing from the Public Works Loan Board (PWLB) was a fairly rapid process.
- There was a need to look to diversify the relatively small business rates pool and this was a focus of the Economic Development Team, under the direction of the Portfolio Holder for Renewal, Recreation and Housing.
- Every property asset that the Council sought to sell carried a reserve price. Where the reserve price was not met the asset would not be sold. The Council was under no pressure to make rapid sales.
- The constitution of the Biggin Hill Airport Consultative Committee was currently being reviewed in its entirety and if changes were agreed

there would be three extra councillor representatives on the Committee.

The Committee thanked the Portfolio Holder for his update.

## **20 RESOURCES, COMMISSIONING AND CONTRACTS MANAGEMENT PORTFOLIO - PRE-DECISION SCRUTINY**

The Committee considered the following reports where the Resources, Contracts and Commissioning Portfolio Holder was recommended to take a decision.

### **A CONTRACT EXTENSION: MECHANICAL & ELECTRICAL REACTIVE REPAIRS AND MAINTENANCE**

The current contract for Mechanical and Electrical Reactive Repairs and Maintenance commenced in October 2021 and was due to expire on 30 September 2023. The contract had a formal extension option of up to two years and authorisation to apply an extension of up to one year was requested. The estimated value of the proposed extension was £195k. The report also set out the broader procurement strategy for Facilities Management.

In response to a question regarding the timescales for updating the asset register, the Committee noted Officers expected the work to be completed in 3 to 4 months and work was currently ahead of schedule, however, some flexibility had been built into the timetable and an allowance had been made for slippage of timescales.

**RESOLVED: That the Portfolio Holder be recommended to approve a one-year extension to the Mechanical & Electrical Reactive Repairs contract held with B&M McHugh at an estimated value of £195k (revised whole life value of £585k).**

### **B TREASURY MANAGEMENT ANNUAL PERFORMANCE REPORT Report FSD23044**

The report summarised treasury management activity during the fourth quarter of 2022/23 and included the Treasury Management Annual Report for 2022/23, which was required to be reported to Full Council. The report ensured that the Council was implementing best practice in accordance with the CIPFA Code of Practice for Treasury Management.

Investments as at 31 March 2023 totalled £344.0m and there was no outstanding external borrowing. For information and comparison, the balance of investments stood at £388.7m as at 31 December 2022 and £377.8m as at 31 March 2022.

In response to a question, the Director of Finance confirmed that a full comparison of the best available rates was undertaken, and funds could and would be moved to achieve the best rates.

In considering long-term investments, the Committee noted that risks were managed and advice from fund managers was considered. At the moment that advice was that if and when interest rates fell the capital value of some longer-term investments would improve.

In response to a question concerning Project Beckenham, the Committee noted that the loan to value (LTV) was less than 50% overall and the Council had a right to take over the asset if necessary.

The Committee noted that paragraph 3.13 of the report should have reflected that Members were expecting a report on the freedom house index and not investing only in countries that were listed as free in the index.

**RESOLVED: That the Portfolio Holder be recommended to**

- 1. Note the Treasury Management Annual Report for 2022/23**
- 2. Approve the actual prudential indicators within the report.**

**21 PRE-DECISION SCRUTINY OF EXECUTIVE REPORTS**

The Committee considered the following reports on the Part 1 agenda for the meeting of the Executive on 3 July 2023:

**(5) PROVISIONAL FINAL ACCOUNTS 2022/23  
Report FSD23041**

The report considered the 2022/23 provisional outturn at portfolio level and Council wide as well as the potential implications for the Council's financial position in 2023/24. The purpose of the report was to give a broad overview of the financial outturn.

The 2022/23 provisional outturn provided for a zero increase in general fund balances, subject to the recommendations in this report being agreed.

More detailed reports would be submitted to individual PDS Committees. Details of the carry forward requests and a summary of the Council's capital programme were also considered in the report.



In response to a question concerning earmarked reserves, the Director of Finance confirmed that there remained risks around the capital programme and until these risks had been considered it was prudent to retain the earmarked reserves. The Committee noted that, in terms of the use of reserves, the Council was in a good position and was well placed to deal with the current financial climate, but challenges would continue, and careful thought would need to be given to the future use of reserves.

With respect to whether the Council would receive any increased income from interest on balances, the Director of Finance confirmed that whilst there had been gains from interest rates, inflation had also had an impact.

The Chairman proposed the following additional recommendation to the Executive:

That Directors ensure that all future growth/cost pressures, prior to being reported to members for consideration, include all mitigation options and savings relating to their respective service areas recognising that any such additional costs are currently unfunded given the Council's budget position.

The motion was seconded by Councillor Onslow, put to the vote and CARRIED.

**RESOLVED: That Executive be recommended to**

- 1. Note the provisional revenue and capital outturns for the 2022/23 financial year and the earmarked balances on the General Fund as at 31<sup>st</sup> March 2023;**
- 2. Note the variations in 2022/23 impacting on the Council's 2023/24 financial position;**
- 3. Note the comments from Chief Officers as detailed in Appendix 2 of the report;**
- 4. Approve the requests for carry forwards totalling £644k (net) as detailed in Appendix 6, subject to the funding being allocated to the Central Contingency in 2023/24 to be drawn down on the approval of the relevant Portfolio Holder;**
- 5. Agree the changes to the central contingency sum as detailed in para. 3.5 of the report;**
- 6. Set aside a sum of £149k as a contribution to the Loneliness Strategy earmarked reserve as detailed in para. 3.8.1 of the report;**
- 7. Recommend Council set aside a sum of £2,000k as a contribution to the Building Infrastructure earmarked reserve as detailed in para. 3.8.2 of the report;**

8. **Set aside a sum of £675k as a contribution to the Capital Fund earmarked reserve as detailed in para. 3.8.3 of the report;**
9. **Set aside a sum of £400k as a contribution to the Arboricultural Backlog Fund earmarked reserve as detailed in para. 3.8.4 of the report;**
10. **Note the utilisation of the Growth Fund as detailed in para 3.9 of the report; and**
11. **Agree the redesignation of various earmarked reserves for utilisation for capital financing as detailed in para 3.6.3 of the report.**
12. **Directors ensure that all future growth/cost pressures, prior to being reported to members for consideration, include all mitigation options and savings relating to their respective service areas recognising that any such additional costs are currently unfunded given the Council's budget position.**

**(6) CAPITAL PROGRAMME OUTTURN 2022/23  
Report FSD23043**

The report set out the final outturn on capital expenditure and receipts for 2022/23. Capital expenditure in the year was £21.0m, compared to the final approved budget of £120.8m, resulting in a total net variation of Cr £99.8m. For funding purposes, £50.0m slippage was assumed in the quarter 3 capital monitoring report, so there was an overall variation of Cr £49.8m in the use of capital receipts and external and revenue contributions.

**RESOLVED: That Executive be recommended to**

1. **Note The capital outturn position for 2022/23; and**
2. **Note that the revenue outturn report elsewhere on the agenda requests the redesignation of various earmarked reserves which have been assumed in the capital programme financing.**

**(7) APPOINTMENT OF ASCOT SERVICES TO RUN THE  
FACILITIES MANAGEMENT AT CHURCHILL COURT**

The report (and the accompanying Part 2 report) provided Members with a recommendation to make a direct award via exemption to competitive tendering to Ascot Services to run the Facilities Management at Churchill Court for an interim contract of up to two years. The proposed direct award was to ensure necessary service provision was in place from the point of exchange and completion for Churchill Court, noting that a full and compliant

procurement process for the longer-term service requirements would commence and be completed as soon as reasonably possible.

In response to a question, the Head of Facilities Management confirmed that whilst no specific market testing had been completed, a comparison of costs had been undertaken. It was also noted that Direct Line had also carried out a competitive tender prior to appointing Ascot Services.

**RESOLVED: That Executive be recommended to**

- 1. Note the report.**
- 2. Approve a direct award via exemption to competitive tendering to Ascot FM for the services detailed in this report for a period of up to two years from 28 July 2023 at an upper estimate of £1.562M per annum (whole life upper estimate of £3.125M).**
- 3. Delegate authority to the Director of Housing, Planning, Property and Regeneration to conclude negotiations with Ascot Services to determine the scope and estimated contract value for this interim contract award and, if needed, to vary the scope of the services as the Council relocates from the Civic Centre to Churchill Court over the period of the contract term – noting the capped FM cost at paragraph 2.2 of the report.**
- 4. Delegate authority to the Assistant Director of Legal Services to finalise and engross the contract as negotiated at paragraph 2.3 of the report.**
- 5. Note that, during the term of the interim contract, a full and compliant procurement process for the Facilities Management requirement will be undertaken as soon as reasonably possible for a new contract to commence within the interim period if possible (and no later than 28 July 2025). This will be subject to formal Member decision on the procurement strategy in due course.**

**(8) IT MANAGED SERVICE CONTRACT AWARD**

This report accompanies a Part 2 report also being considered on this agenda which recommends that the Council awards a contract for the provision of IT Services.

Members also noted that this contract was one of a number of contracts in place relating to IT services for the Council.

The Committee requested that Members be provided with details of the KPIs for the contract following the meeting. Members also requested that details of KPIs be included in any future contract award presented to Committees along with details for previous KPIs for context.

**RESOLVED: That Executive be recommended to**

- 1. Award the IT Services Contract as detailed in the accompanying Part 2 report for a contract period of five years to begin on 16<sup>th</sup> December 2023, with the option to extend for a further five years and including the optional service as noted in Part 2 of this report.**
- 2. Delegate to the Director of Corporate Services and Governance in consultation with the Portfolio Holder for Resources, Commissioning and Contract Management, the authorisation to extend this contract for the period, and on the basis, of the recommendation at 2.1 in this report.**
- 3. Delegate authority to the Director of Corporate Services and Governance to take decisions necessary to enable the implementation of the contract with the recommended bidder and to conclude all necessary contractual documentation.**
- 4. Note that the procurement process and associated activities have been undertaken with due regard to and compliance with necessary regulation, rules and guidelines and with the participation of all required internal services and functions. A summary of the process and activities is provided in this report.**

**22 POLICY DEVELOPMENT AND OTHER ITEMS**

**A REVENUES SERVICE MONITORING REPORT  
Report FSD23036**

The report provided information regarding the performance of the Revenues Services provided by Liberata for the period 1 December 2022 to 31 March 2023. A letter from Bola Odunsi, Liberata's Regional Director (London and the Southeast), provided an update on each of the individual services and is attached at Appendix 1 with statistical data relating to the Revenues Service attached at Appendix 2.

The Chairman welcomed representatives from Liberata to the meeting, in particular welcoming Mr Bola Odunsi, Liberata's Regional Director (London and the Southeast).

In response to a question, the Benefits Manager confirmed that there had been no significant fall in the number of empty homes being charged the empty homes premium.

In response to a further question, the Benefits Manager confirmed that it was still too early to say whether there would be a beneficial impact on collection of business rates. The Committee noted that collection rates had improved as courts had resumed hearings and it was now possible for the Council to recover unpaid rates. It was noted that historically the Council had not had to

take recovery action however, due to the current climate the Local Authority was experiencing issues that it had not experienced before.

**RESOLVED: That the report be noted.**

**B BENEFITS SERVICE MONITORING REPORT  
Report FSD23037**

The report provided information regarding Liberata's performance in the provision of Exchequer Services for the period 1<sup>st</sup> April 2022 to 31<sup>st</sup> March 2023.

A letter from Bola Odunsi, Liberata's Regional Contract Director, provided an update on each individual service and was attached at Appendix 1 of the report with statistical data relating to the services shown in subsequent appendices.

**RESOLVED: That the report be noted.**

**C EXCHEQUER SERVICE - CONTRACT PERFORMANCE REPORT  
Report FSD23037**

The report provided information regarding Liberata's performance in the provision of Exchequer Services for the period 1<sup>st</sup> April 2022 to 31<sup>st</sup> March 2023.

A letter from Bola Odunsi, Liberata's Regional Contract Director, provided an update on each individual service and was attached at Appendix 1 of the report with statistical data relating to the services shown in subsequent appendices.

**RESOLVED: That the report be noted.**

**D CUSTOMER SERVICES CONTRACT MONITORING REPORT  
Report CSD23067**

The report provided information on the performance of the Customer Service Contract provided by Liberata for the period 1<sup>st</sup> November 2022 to 30<sup>th</sup> April 2023.

A letter from Bola Odunsi Regional Director (London & The Southeast) for Liberata, provides his update on each individual element and was attached at Appendix 1 of the report.

Members welcomed the improvement in the performance of the out-of-hours service. In response to a question, the Committee received assurances that resources would be deployed to ensure that targets continued to be met.

The Committee requested that information on the number of applications for Blue Badges that were rejected be provided following the meeting.

**RESOLVED: That the report be noted.**

**23 LOCAL GOVERNMENT ACT 1972 AS AMENDED BY THE LOCAL GOVERNMENT (ACCESS TO INFORMATION) (VARIATION) ORDER 2006, AND THE FREEDOM OF INFORMATION ACT 2000**

**RESOLVED that the Press and public be excluded during consideration of the items of business referred to below as 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.**

**The following summaries  
refer to matters involving exempt information**

**24 PRE-DECISION SCRUTINY OF EXEMPT EXECUTIVE REPORTS**

The Committee considered the following reports on the Part 2 agenda for the meeting of the Executive on 5 July 2023:

**20 PART 2: APPOINTMENT OF ASCOT SERVICES TO RUN THE FACILITIES MANAGEMENT AT CHURCHILL COURT**

That the Executive be recommended to consider the report and agreed the recommendations.

**21 PART 2: IT MANAGED SERVICE CONTRACT AWARD**

That the Executive be recommended to consider the report and agreed the recommendations.

The Meeting ended at 8.40 pm

Chairman

# Agenda Item 5

Report No.  
CSD23103

London Borough of Bromley

PART ONE - PUBLIC

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**Decision Maker:** EXECUTIVE, RESOURCES AND CONTRACTS POLICY  
DEVELOPMENT AND SCRUTINY COMMITTEE

**Date:** Monday 18 September 2023

**Decision Type:** Non-Urgent Non-Executive Non-Key

**Title:** MATTERS OUTSTANDING AND WORK PROGRAMME

**Contact Officer:** Philippa Gibbs, Democratic Services Officer  
Tel: 020 8461 7638 E-mail: Philippa.Gibbs@bromley.gov.uk

**Chief Officer:** Director of Corporate Services and Governance

**Ward:** All Wards

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1. Reason for decision/report and options

This report deals with the Committee's business management including:

- Monitoring progress against actions arising from previous meetings; and
- Developing the 2023/24 Forward Work Programme.

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2. **RECOMMENDATION(S)**

That PDS Committee reviews and comments on:

1. Progress on matters arising from previous meetings; and
2. The 2023/24 work programme, indicating any changes or particular issues that it wishes to scrutinise for the year ahead.

### Impact on Vulnerable Adults and Children

1. Summary of Impact: None
- 

### Transformation Policy

1. Policy Status: Not Applicable:
  2. Making Bromley Even Better Priority (delete as appropriate): Not Applicable:
- 

### Financial

1. Cost of proposal: Not Applicable:
  2. Ongoing costs: Not Applicable:
  3. Budget head/performance centre: Democratic Services
  4. Total current budget for this head: £366k
  5. Source of funding: Revenue Budget
- 

### Personnel

1. Number of staff (current and additional): 6
  2. If from existing staff resources, number of staff hours:
- 

### Legal

1. Legal Requirement: None:
  2. Call-in: Not Applicable: Non-Executive reports are not subject to call-in
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### Procurement

1. Summary of Procurement Implications: Not Applicable
- 

### Property

1. Summary of Property Implications: Not Applicable
- 

### Carbon Reduction and Social Value

1. Summary of Carbon Reduction/Sustainability Implications: Not Applicable
- 

### Customer Impact

1. Estimated number of users or customers (current and projected): This report is intended primarily for the benefit of Committee Members.
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### Ward Councillor Views

1. Have Ward Councillors been asked for comments? Not Applicable
2. Summary of Ward Councillors comments: Not Applicable



### 3. COMMENTARY

#### Matters Outstanding from Previous Meetings

- 3.1. **Appendix 1** provides a progress update on requests made by the Committee at previous meetings. This list is checked after each meeting so that any outstanding issues can be addressed at an early stage and timely progress made.

#### Work Programme

- 3.2 Each PDS Committee determines its own work programme, balancing the roles of (i) pre-decision scrutiny and holding the Executive to account, (ii) policy development and review and (iii) external scrutiny. ERC PDS Committee has the additional role of providing a lead on scrutiny issues and co-ordinating PDS work.
- 3.3 PDS Committees need to prioritise their key issues. The work programme also needs to allow room for items that arise through the year, including Member requests, call-ins and referrals from other Committees. Committees need to ensure that their workloads are realistic and balanced, allowing sufficient time for important issues to be properly scrutinised. Members also need to consider the most appropriate means to pursue each issue – the current overview and scrutiny arrangements offer a variety of approaches, whether through a report to a meeting, a time-limited working group review, a presentation, a select committee style meeting focused on a single key issue, or another method.
- 3.4 **Appendix 2** sets out the ERC PDS Committee Work Programme for 2023/24, including: the provisional report title (or activity); the lead division; and Committee’s role. Committee is invited to comment on the proposed schedule and suggest any changes it considers appropriate. Other reports will be added to the 2023/24 Work Programme as items arise. In addition, there may also be references from other committees, the Resources, Contracts and Commissioning Portfolio Holder, or the Executive.

#### Sub-Committees and Working Groups

- 3.5 The Policy Development and Scrutiny Toolkit suggests that each Committee should aim to carry out no more than two or three full scale reviews each year, and it offers guidance and techniques for prioritising reviews. At a time of pressure on Member and officer resources it is important that any additional work is carefully targeted at priority issues where improvements can be achieved. In recent years, this Committee has examined a number of issues through its Working Groups - part of the Committee’s workload may include follow-up work on some of these reviews.

<b>Non-Applicable Headings:</b>	Impact on Vulnerable Adults and Children, Transformation/Policy Implications, Financial Implications, Personnel Implications, Legal Implications, Procurement Implications, Property Implications, Carbon Reduction/Social Value Implications, Customer Impact, Ward Councillor Views
Background Documents: (Access via Contact Officer)	Minutes of previous meetings

**MATTERS OUTSTANDING FROM PREVIOUS MEETINGS**

<b>Minute Number/Title /Date</b>	<b>Action/PDS Request</b>	<b>Update</b>	<b>Action by</b>	<b>Expected Completion Date</b>
22d Customer Services Contract Monitoring	That information on the number of applications for Blue Badges that are rejected be provided following the meeting.		Assistant Director for Customer Services	

**EXECUTIVE, RESOURCES & CONTRACTS PDS COMMITTEE  
WORK PROGRAMME 2023/24**

Risk Registers	Audit	Information Briefing
<b>Meeting Date: 18 September 2023</b>	<b>Division</b>	<b>Committee Role</b>
Matters Arising/Work Programme/Forward Plan	Democratic Services	Standard Items
Executive Agenda	Various	Pre-decision scrutiny
Capital Programme Monitoring - 1st Quarter 2022/23	Finance	Pre-decision scrutiny (PH)
Treasury Management Q1	Finance	Pre-decision scrutiny (PH)
Scrutiny of the Chief Executive (including short written summary)	Chief Execs	PDS Committee
Contract Register and Contracts Database	Governance and Contracts	PDS Committee
Free Speech Report	Legal Services	PDS Committee
<b>Meeting Date: 17 October 2023</b>	<b>Division</b>	<b>Committee Role</b>
Matters Arising/Work Programme/Forward Plan	Democratic Services	Standard Items
Executive Agenda	Various	Pre-decision scrutiny
Insurance Fund – Annual Report 2021-22	Insurance and Risk	PDS Committee
Section 106 Agreements: Update*	Planning and Regeneration	PDS Committee
Risk Register (Red Risks)	Audit	Information Briefing
<b>Meeting Date: 27 November 2023</b>	<b>Division</b>	<b>Committee Role</b>
Matters Arising/Work Programme/Forward Plan	Democratic Services	Standard Items
Executive Agenda	Various	Pre-decision scrutiny

Treasury Management – Quarter 2 Performance 2022/23 & Mid-Year Review	Finance	Pre-decision scrutiny (PH)
Insurance Fund – Annual Report 2021/22	Finance	Pre-decision scrutiny (PH)
Capital Programme Monitoring Q2.	Finance	Pre-decision scrutiny (PH)
BT/ICT Contract Monitoring Report	IT	PDS Committee – Monitoring Report
Contracts Register and Contracts Database Update	Governance and Contracts	PDS Committee
Risk Registers	Audit	Information Briefing

<b>Meeting Date: 16 January 2024</b>	<b>Division</b>	<b>Committee Role</b>
Matters Arising/Work Programme/Forward Plan	Democratic Services	Standard Items
Executive Agenda	Various	Pre-decision scrutiny
Capital Programme Monitoring - 2nd Quarter 2022/23	Finance	Pre-decision scrutiny (PH)
Update on OPR	Property	PDS Committee
Benefits Service Monitoring Report	Revenues & Benefits	PDS Committee – Monitoring Report
Revenues Service Monitoring Report	Revenues & Benefits	PDS Committee – Monitoring Report
Exchequer Service - Contract Performance Report	Finance	PDS Committee – Monitoring Report
Customer Services - Contract Performance Report	Customer Services	PDS Committee – Monitoring Report
Scrutiny of the Resources, Commissioning & Contract Management Portfolio Holder (including short written summary)	N/A	PDS Committee
Scrutiny of the Leader (including short written summary)	N/A	PDS Committee

<b>Meeting Date: 5 February 2024</b>	<b>Division</b>	<b>Committee Role</b>
Matters Arising/Work Programme/Forward Plan	Democratic Services	Standard Items
Executive Agenda	Various	Pre-decision scrutiny
Capital Programme Monitoring Q.3	Finance	PH Pre-Decision Scrutiny
Annual Investment Strategy 2023/24 and Quarter 3 Treasury Management Performance	Finance	PH Decision/Council
Scrutiny of the Resources, Commissioning and Contract Management Executive Assistant (if	N/A	PDS Committee

<i>applicable</i> ) (including short written summary)		
Free Speech (Chairman's Request)	Corporate Services/HR	PDS Committee
Contracts Register and Contracts Database Update	Governance and Contracts	PDS Committee
Property Investment Update	Property	PDS Committee
Risk Register (Red Risks)	Audit	Information Briefing
<b>Meeting Date: 25 March 2024</b>	<b>Division</b>	<b>Committee Role</b>
Matters Arising/Work Programme/Forward Plan	Democratic Services	Standard Items
Executive Agenda	Various	Pre-decision scrutiny
Post-Completion Review of Oracle Fusion Implementation	Finance.	PDS Committee.
Scrutiny of The Leader (including short written summary)	N/A	PDS Committee
Scrutiny of the Chief Executive (including short written summary)	N/A	PDS Committee
Annual PDS Report 2022/23	Democratic Services	PDS Committee

\*Part 2 (Exempt) Report

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**LONDON BOROUGH OF BROMLEY**

**FORWARD PLAN OF KEY AND PRIVATE EXECUTIVE DECISIONS PUBLISHED ON: 22 AUGUST 2023**

**PERIOD COVERED: August 2023 - November 2023**

**DATE FOR PUBLISHING NEXT FORWARD PLAN OF KEY AND PRIVATE EXECUTIVE DECISIONS: 19 September 2023**

WHAT IS BEING DECIDED?	WHO IS THE DECISION MAKER?	WHEN WILL THE DECISION BE MADE AND WHO WILL BE CONSULTED BEFORE THE DECISION IS MADE?	HOW WILL THE CONSULTATION TAKE PLACE?	HOW CAN YOU MAKE COMMENTS ON THE DECISION BEFORE IT IS MADE?	WILL THIS ITEM BE CONSIDERED IN PUBLIC OR IN PRIVATE?	WHAT SUPPORT DOCUMENTS AND OTHER INFORMATION WILL BE AVAILABLE?
<b>COUNCIL</b>						
COUNCIL TAX LEVEL 2024/25	Council	26 February 2024  Executive, PDS Committees, business community & local residents	Meetings	Contact Officer:  Peter Turner Tel: 020 8313 4668 <a href="mailto:peter.turner@bromley.gov.uk">peter.turner@bromley.gov.uk</a>	<u>Meeting in public</u>	Report and relevant background documents
REVENUE BUDGET 2024/25	Council	26 February 2024  Executive, PDS Committees, business community and local residents	Meetings	Contact Officer:  Peter Turner Tel: 020 8313 4668 <a href="mailto:peter.turner@bromley.gov.uk">peter.turner@bromley.gov.uk</a>	<u>Meeting in public</u>	Report and relevant background documents
CAPITAL STRATEGY 2024 TO 2028	Council	26 February 2024  Executive, PDS Committees and key stakeholders	Meetings	Contact Officer:  Peter Turner Tel: 020 8313 4668 <a href="mailto:peter.turner@bromley.gov.uk">peter.turner@bromley.gov.uk</a>	<u>Meetings in public</u>	Reports and relevant background documents.

WHAT IS BEING DECIDED?	WHO IS THE DECISION MAKER?	WHEN WILL THE DECISION BE MADE AND WHO WILL BE CONSULTED BEFORE THE DECISION IS MADE?	HOW WILL THE CONSULTATION TAKE PLACE?	HOW CAN YOU MAKE COMMENTS ON THE DECISION BEFORE IT IS MADE?	WILL THIS ITEM BE CONSIDERED IN PUBLIC OR IN PRIVATE?	WHAT SUPPORT DOCUMENTS AND OTHER INFORMATION WILL BE AVAILABLE?
ANNUAL INVESTMENT STRATEGY 2024/25	Council	26 February 2024  Executive, Resources & Contracts PDS Committee	Meetings	Contact Officer:  Peter Turner Tel: 020 8313 4668 <a href="mailto:peter.turner@bromley.gov.uk">peter.turner@bromley.gov.uk</a>	<u>Meeting in public</u>	Report and relevant background documents
TREASURY MANAGEMENT STRATEGY 2024/25	Council	26 February 2024  Executive, Resources and Contracts PDS Committee	Meetings	Contact Officer:  Peter Turner Tel: 020 8313 4668 <a href="mailto:peter.turner@bromley.gov.uk">peter.turner@bromley.gov.uk</a>	<u>Meeting in public</u>	Reports and relevant background documents
<b>EXECUTIVE</b>						
AWARD OF CONTRACT FOR WORK AT NEW CIVIC OFFICES	Executive	20 September 2023  Executive, Resources and Contracts PDS Committee	Meetings	Contact Officer:  Colin Brand Tel: 0208 313 4107 <a href="mailto:colin.brand@bromley.gov.uk">colin.brand@bromley.gov.uk</a>	<u>Report is expected to be considered in the public part of the meetings with exempt material considered during confidential proceedings.</u>	Report and relevant background documents
BIGGIN HILL - NOISE ACTION PLAN (NAP)	Executive	20 September 2023  Executive, Resources and Contracts PDS Committee	Meetings	Contact Officer:  Sara Bowrey Tel: 020 8313 4013 <a href="mailto:sara.bowrey@bromley.gov.uk">sara.bowrey@bromley.gov.uk</a>	<u>Report is expected to be considered in the public part of the meetings with exempt material considered during confidential proceedings.</u>	Report and relevant background documents



WHAT IS BEING DECIDED?	WHO IS THE DECISION MAKER?	WHEN WILL THE DECISION BE MADE AND WHO WILL BE CONSULTED BEFORE THE DECISION IS MADE?	HOW WILL THE CONSULTATION TAKE PLACE?	HOW CAN YOU MAKE COMMENTS ON THE DECISION BEFORE IT IS MADE?	WILL THIS ITEM BE CONSIDERED IN PUBLIC OR IN PRIVATE?	WHAT SUPPORT DOCUMENTS AND OTHER INFORMATION WILL BE AVAILABLE?
SECOND PHASE HOUSING SCHEMES	Executive	20 September 2023  Renewal Recreation and Housing PDS Committee	Meetings	Contact Officer:  Alicia Munday Tel: 020 8313 4559 <a href="mailto:Alicia.Munday@bromley.gov.uk">Alicia.Munday@bromley.gov.uk</a>	<u>Meetings in public</u>	Report and relevant background documents
HOUSING ALLOCATION SCHEME AND CHOICE BASED LETTINGS	Executive	20 September 2023  Renewal, Recreation and Housing PDS Committee	Meetings	Contact Officer:  Lynnette Chamielec Tel: 020 8313 4009 <a href="mailto:Lynnette.Chamielec@bromley.gov.uk">Lynnette.Chamielec@bromley.gov.uk</a>	<u>Meeting in public</u>	Report and relevant background information
HOUSING MANAGEMENT CONTRACT	Executive	20 September 2023  Renewal, Recreation and Housing PDS Committee	Meetings	Contact Officer:  Michelle Bowler Tel: 020 8313 4014 <a href="mailto:Michelle.Bowler@bromley.gov.uk">Michelle.Bowler@bromley.gov.uk</a>	<u>Meeting in Public</u>	Report and relevant background information
HOMES FOR UKRAINE UPDATE	Executive	20 September 2023  Executive, Resources and Contracts PDS Committee	Meetings	Contact Officer:  Tracey Wilson Tel: 020 8313 4515 <a href="mailto:tracey.wilson@bromley.gov.uk">tracey.wilson@bromley.gov.uk</a>	<u>Meeting in public</u>	Report and relevant background documents

WHAT IS BEING DECIDED?	WHO IS THE DECISION MAKER?	WHEN WILL THE DECISION BE MADE AND WHO WILL BE CONSULTED BEFORE THE DECISION IS MADE?	HOW WILL THE CONSULTATION TAKE PLACE?	HOW CAN YOU MAKE COMMENTS ON THE DECISION BEFORE IT IS MADE?	WILL THIS ITEM BE CONSIDERED IN PUBLIC OR IN PRIVATE?	WHAT SUPPORT DOCUMENTS AND OTHER INFORMATION WILL BE AVAILABLE?
CHURCHILL THEATRE OPTIONS	Executive	20 September 2023  Executive, Resources and Contracts PDS Committee	Meetings	Contact Officer:  Amy Milton Tel: 020 8461 7172 <a href="mailto:amy.milton@bromley.gov.uk">amy.milton@bromley.gov.uk</a>	<u>Report is expected to be considered in the public part of the meetings with exempt material considered during confidential proceedings.</u>	Report and relevant background documents
SUBSTANCE MISUSE SERVICE CONTRACT AWARD	Executive	20 September 2023  Adult Care and Health PDS Committee	Meetings	Contact Officer:  Mimi Morris-Cotterill Tel: 020 8461 7779 <a href="mailto:mimi.morris-cotterill@bromley.gov.uk">mimi.morris-cotterill@bromley.gov.uk</a>	<u>Report is expected to be considered in the public part of the meetings with exempt material considered during confidential proceedings.</u>	Report and relevant background documents
CARERS PLAN	Executive	20 September 2023  Adult Care and Health PDS Committee	Meetings	Contact Officer:  Sean Rafferty  <a href="mailto:sean.rafferty@bromley.gov.uk">sean.rafferty@bromley.gov.uk</a>	<u>Meeting in public</u>	Report and relevant background documents
SECTION 256 FUNDING ALLOCATION	Executive	20 September 2023  Adult Care and Health PDS Committee	Meetings	Contact Officer:  Andrew Royle Tel: 020 8461 7601 <a href="mailto:andrew.royle@bromley.gov.uk">andrew.royle@bromley.gov.uk</a>	<u>Meeting in public</u>	Report and relevant background documents

WHAT IS BEING DECIDED?	WHO IS THE DECISION MAKER?	WHEN WILL THE DECISION BE MADE AND WHO WILL BE CONSULTED BEFORE THE DECISION IS MADE?	HOW WILL THE CONSULTATION TAKE PLACE?	HOW CAN YOU MAKE COMMENTS ON THE DECISION BEFORE IT IS MADE?	WILL THIS ITEM BE CONSIDERED IN PUBLIC OR IN PRIVATE?	WHAT SUPPORT DOCUMENTS AND OTHER INFORMATION WILL BE AVAILABLE?
FACILITIES MANAGEMENT CONTRACT - GATEWAY REPORT	Executive	20 September 2023  Executive, Resources & Contracts PDS Committee	Meetings	Contact Officer:  Sara Bowrey Tel: 020 8313 4013 <a href="mailto:sara.bowrey@bromley.gov.uk">sara.bowrey@bromley.gov.uk</a>	<u>Meeting in public</u>	Report and relevant background documents
COMMUNITY HOUSE	Executive	20 September 2023  Executive, Resources & Contracts PDS Committee	Meetings	Contact Officer:  Sara Bowrey Tel: 020 8313 4013 <a href="mailto:sara.bowrey@bromley.gov.uk">sara.bowrey@bromley.gov.uk</a>	<u>Report is expected to be considered in the public part of the meeting with exempt material considered during confidential proceedings</u>	Report and relevant background documents
AWARD OF CONTRACT: BEAM LTD	Executive	18 October 2023  Renewal, Recreation and Housing PDS Committee	Meetings	Contact Officer:  Lydia Lewinson Tel: 020 8461 7691 <a href="mailto:lydia.lewinson2@bromley.gov.uk">lydia.lewinson2@bromley.gov.uk</a>	<u>Meeting in public</u>	Report and relevant background documents
CRM REPLACEMENT CAPITAL PROJECT - WEBSITE REDESIGN UPDATE REPORT	Executive	18 October 2023  Executive, Resources and Contracts PDS Committee	Meetings	Contact Officer:  Duncan Bridgewater Tel: 0208 461 7676 <a href="mailto:Duncan.Bridgewater@bromley.gov.uk">Duncan.Bridgewater@bromley.gov.uk</a>	<u>Meeting in public</u>	Report and relevant background documents

WHAT IS BEING DECIDED?	WHO IS THE DECISION MAKER?	WHEN WILL THE DECISION BE MADE AND WHO WILL BE CONSULTED BEFORE THE DECISION IS MADE?	HOW WILL THE CONSULTATION TAKE PLACE?	HOW CAN YOU MAKE COMMENTS ON THE DECISION BEFORE IT IS MADE?	WILL THIS ITEM BE CONSIDERED IN PUBLIC OR IN PRIVATE?	WHAT SUPPORT DOCUMENTS AND OTHER INFORMATION WILL BE AVAILABLE?
ADULT SOCIAL CARE STRATEGY	Executive	18 October 2023  Adult Care and Health PDS Committee	Meetings	Contact Officer:  Sean Rafferty  <a href="mailto:sean.rafferty@bromley.gov.uk">sean.rafferty@bromley.gov.uk</a>	<u>Meeting in public</u>	Report and relevant background documents
ADOPTION OF BROMLEY TOWN CENTRE SUPPLEMENTARY PLANNING DOCUMENT	Executive	18 October 2023  Renewal Recreation and Housing PDS Committee	Meetings	Contact Officer:  Ben Johnson Tel: 020 8461 7845 <a href="mailto:ben.johnson@bromley.gov.uk">ben.johnson@bromley.gov.uk</a>	<u>Meeting in Public</u>	Reports and relevant background documents
AWARD OF BUILDING CONTRACT FOR OPR (1)	Executive	29 November 2023  Executive, Resources and Contracts PDS Committee	Meetings	Contact Officer:  Darren Essex  <a href="mailto:darren.essex@bromley.gov.uk">darren.essex@bromley.gov.uk</a>	<u>Report is expected to be considered in the public part of the meetings with exempt material considered during confidential proceedings.</u>	Report and relevant background documents
ADOPTION OF LEISURE STRATEGY	Executive	29 November 2023  Renewal, Recreation and Housing PDS Committee	Meetings	Contact Officer:  Alicia Munday Tel: 020 8313 4559 <a href="mailto:Alicia.Munday@bromley.gov.uk">Alicia.Munday@bromley.gov.uk</a>	<u>Meeting in public</u>	Report and relevant background documents

WHAT IS BEING DECIDED?	WHO IS THE DECISION MAKER?	WHEN WILL THE DECISION BE MADE AND WHO WILL BE CONSULTED BEFORE THE DECISION IS MADE?	HOW WILL THE CONSULTATION TAKE PLACE?	HOW CAN YOU MAKE COMMENTS ON THE DECISION BEFORE IT IS MADE?	WILL THIS ITEM BE CONSIDERED IN PUBLIC OR IN PRIVATE?	WHAT SUPPORT DOCUMENTS AND OTHER INFORMATION WILL BE AVAILABLE?
HOUSING IT SYSTEMS	Executive	29 November 2023  Executive, Resources and Contracts PDS Committee	Meeting	Contact Officer:  Tracey Wilson Tel: 020 8313 4515 <a href="mailto:tracey.wilson@bromley.gov.uk">tracey.wilson@bromley.gov.uk</a>	<u>Meeting in public</u>	Report and relevant background documents
OLDER PEOPLE'S BLOCK BEDS	Executive	29 November 2023  Adult Care and Health PDS Committee	Meetings	Contact Officer:  Kelly Sylvester Tel: 020 8461 7653 <a href="mailto:kelly.sylvester@bromley.gov.uk">kelly.sylvester@bromley.gov.uk</a>	<u>Meeting in Public</u>	Report and relevant background documents
SECTION 31 AGREEMENT BETWEEN LONDON BOROUGH OF BROMLEY AND OXLEAS NHS TRUST FOR THE INTEGRATED PROVISION OF MENTAL HEALTH SERVICES	Executive	29 November 2023  Adult Care and Health PDS Committee	Meetings	Contact Officer:  Kelly Sylvester Tel: 020 8461 7653 <a href="mailto:kelly.sylvester@bromley.gov.uk">kelly.sylvester@bromley.gov.uk</a>	<u>Meeting in public</u>	Reports and relevant background documents

WHAT IS BEING DECIDED?	WHO IS THE DECISION MAKER?	WHEN WILL THE DECISION BE MADE AND WHO WILL BE CONSULTED BEFORE THE DECISION IS MADE?	HOW WILL THE CONSULTATION TAKE PLACE?	HOW CAN YOU MAKE COMMENTS ON THE DECISION BEFORE IT IS MADE?	WILL THIS ITEM BE CONSIDERED IN PUBLIC OR IN PRIVATE?	WHAT SUPPORT DOCUMENTS AND OTHER INFORMATION WILL BE AVAILABLE?
LONDON BOROUGH'S LEGAL ALLIANCE FRAMEWORK AGREEMENT FOR BARRISTERS	Executive	29 November 2023  Executive, Resources and Contracts PDS Committee	Meeting	Contact Officer:  Shupriya Iqbal Tel: 020 8461 7161 <a href="mailto:shupriya.iqbal@bromley.gov.uk">shupriya.iqbal@bromley.gov.uk</a>	<u>Meeting in public</u>	Report and relevant background documents
AWARD OF CONTRACT FOR WORKS AT OAKLANDS PRIMARY SCHOOL	Executive	29 November 2023  Children, Education and Families PDS Committee	Meetings	Contact Officer:  Robert Bollen Tel: 020 8313 4697 <a href="mailto:Robert.Bollen@bromley.gov.uk">Robert.Bollen@bromley.gov.uk</a>	<u>Meeting in public</u>	Report and relevant background documents
FAMILY DRUG ALCOHOL COURT	Executive	7 February 2024  Children, Education and Families PDS Committee	Meetings	Contact Officer:  Kelly Sylvester Tel: 020 8461 7653 <a href="mailto:kelly.sylvester@bromley.gov.uk">kelly.sylvester@bromley.gov.uk</a>	<u>Report is expected to be considered in the public part of the meetings with exempt material considered during confidential proceedings.</u>	Report and relevant background documents
AWARD OF CONTRACT - CAPITAL WORKS AT RED HILL PRIMARY SCHOOL	Executive	7 February 2024  Children, Education & Families PDS Committee	Meetings	Contact Officer:  Robert Bollen Tel: 020 8313 4697 <a href="mailto:Robert.Bollen@bromley.gov.uk">Robert.Bollen@bromley.gov.uk</a>	<u>Report is expected to be considered in the public part of the meetings with exempt material considered during confidential proceedings.</u>	Report and relevant background documents

WHAT IS BEING DECIDED?	WHO IS THE DECISION MAKER?	WHEN WILL THE DECISION BE MADE AND WHO WILL BE CONSULTED BEFORE THE DECISION IS MADE?	HOW WILL THE CONSULTATION TAKE PLACE?	HOW CAN YOU MAKE COMMENTS ON THE DECISION BEFORE IT IS MADE?	WILL THIS ITEM BE CONSIDERED IN PUBLIC OR IN PRIVATE?	WHAT SUPPORT DOCUMENTS AND OTHER INFORMATION WILL BE AVAILABLE?
ASTLEY CENTRE	Executive	7 February 2024  Adult Care and Health PDS Committee	Meetings	Contact Officer:  Christian Markandu  <a href="mailto:christian.markandu@bromley.gov.uk">christian.markandu@bromley.gov.uk</a>	<u>Meeting in Public</u>	Report and relevant background documents
HOUSING ALLOCATION SCHEME AND CHOICE BASED LETTINGS POLICY	Executive	7 February 2024  Renewal, Recreation and Housing PDS Committee	Meetings	Contact Officer:  Lynnette Chamielec Tel: 020 8313 4009 <a href="mailto:Lynnette.Chamielec@bromley.gov.uk">Lynnette.Chamielec@bromley.gov.uk</a>	<u>Meeting in public</u>	report and relevant background documents
GATEWAY 2 AWARD - ADULT MENTAL HEALTH RECOVERY AND REHABILITATION SUPPORT @ HOME SERVICE	Executive	7 February 2024  Adult Care and Health PDS Committee	Meetings	Contact Officer:  Kelly Sylvester Tel: 020 8461 7653 <a href="mailto:kelly.sylvester@bromley.gov.uk">kelly.sylvester@bromley.gov.uk</a>	<u>Report is expected to be considered in the public part of the meetings with exempt material considered during confidential proceedings.</u>	Report and relevant background papers
AWARD OF BUILDING CONTRACT FOR OPR (2)	Executive	June 2024  Executive, Resources and Contracts PDS Committee	Meetings	Contact Officer:  Darren Essex  <a href="mailto:darren.essex@bromley.gov.uk">darren.essex@bromley.gov.uk</a>	<u>Report is expected to be considered in the public part of the meetings with exempt material considered during confidential proceedings.</u>	Report and relevant background documents
<b>ADULT CARE &amp; HEALTH PORTFOLIO</b>						

WHAT IS BEING DECIDED?	WHO IS THE DECISION MAKER?	WHEN WILL THE DECISION BE MADE AND WHO WILL BE CONSULTED BEFORE THE DECISION IS MADE?	HOW WILL THE CONSULTATION TAKE PLACE?	HOW CAN YOU MAKE COMMENTS ON THE DECISION BEFORE IT IS MADE?	WILL THIS ITEM BE CONSIDERED IN PUBLIC OR IN PRIVATE?	WHAT SUPPORT DOCUMENTS AND OTHER INFORMATION WILL BE AVAILABLE?
FORMAL CONTRACT EXTENSION BROMLEY HEALTHWATCH SERVICE	Portfolio Holder for Adult Care and Health	Between 1 September 2023 and 30 September 2023  Adult Care and Health PDS Committee	Meetings	Contact Officer:  Kelly Sylvester Tel: 020 8461 7653 <a href="mailto:kelly.sylvester@bromley.gov.uk">kelly.sylvester@bromley.gov.uk</a>	<u>Report is expected to be considered in the public part of the meetings with exempt material considered during confidential proceedings.</u>	Report and relevant background documents
GATEWAY REPORT-OXLEAS CONTRACT EXTENSION	Portfolio Holder for Adult Care and Health	Between 5 September 2023 and 30 November 2023  Adult Care and Health PDS Committee	Meetings	Contact Officer:  Mimi Morris-Cotterill Tel: 020 8461 7779 <a href="mailto:mimi.morris-cotterill@bromley.gov.uk">mimi.morris-cotterill@bromley.gov.uk</a>	<u>Report is expected to be considered in the public part of the meetings with exempt material considered during confidential proceedings.</u>	Report and relevant background papers
VARIATION TO THE PRIMARY AND SECONDARY INTERVENTION SERVICE	Portfolio Holder for Adult Care and Health	Between 21 November 2023 and 30 November 2023  Adult Care & Health PDS Committee	Meetings	Contact Officer:  Ola Akinlade Tel: 020 8313 4744 <a href="mailto:ola.akinlade@bromley.gov.uk">ola.akinlade@bromley.gov.uk</a>	<u>Report is expected to be considered in the public part of the meeting with exempt material considered during confidential proceedings</u>	Report and relevant background documents
<b>CHILDREN, EDUCATION &amp; FAMILIES PORTFOLIO</b>						



WHAT IS BEING DECIDED?	WHO IS THE DECISION MAKER?	WHEN WILL THE DECISION BE MADE AND WHO WILL BE CONSULTED BEFORE THE DECISION IS MADE?	HOW WILL THE CONSULTATION TAKE PLACE?	HOW CAN YOU MAKE COMMENTS ON THE DECISION BEFORE IT IS MADE?	WILL THIS ITEM BE CONSIDERED IN PUBLIC OR IN PRIVATE?	WHAT SUPPORT DOCUMENTS AND OTHER INFORMATION WILL BE AVAILABLE?
FAMILY GROUP CONFERENCE - APPROVAL TO AWARD GATEWAY REPORT	Director of Children's Services	Between 1 November 2023 and 30 November 2023  Children, Education & Families PDS Committee	Meetings	Contact Officer:  Bola Bakare Tel: 0208461 7614 <a href="mailto:bola.bakare@bromley.gov.uk">bola.bakare@bromley.gov.uk</a>	<u>Report is expected to be considered in the public part of the meetings with exempt material considered during confidential proceedings.</u>	Report and relevant background information
<b>PUBLIC PROTECTION &amp; ENFORCEMENT PORTFOLIO</b>						
<b>RENEWAL, RECREATION &amp; HOUSING PORTFOLIO</b>						
HOUSING PROGRESS UPDATE	Portfolio Holder for Renewal, Recreation and Housing	September 2023  Renewal, Recreation and Housing PDS Committee	Meetings	Contact Officer:  Lydia Lee Tel: 020 8313 4456 <a href="mailto:lydia.lee@bromley.gov.uk">lydia.lee@bromley.gov.uk</a>	<u>Meeting in public</u>	Report and relevant background documents
CROFTON ROMAN VILLA	Portfolio Holder for Renewal, Recreation and Housing	September 2023  Renewal, Recreation and Housing PDS Committee	Meetings	Contact Officer:  Lydia Lee Tel: 020 8313 4456 <a href="mailto:lydia.lee@bromley.gov.uk">lydia.lee@bromley.gov.uk</a>	<u>Meeting in public</u>	Report and relevant background documents

WHAT IS BEING DECIDED?	WHO IS THE DECISION MAKER?	WHEN WILL THE DECISION BE MADE AND WHO WILL BE CONSULTED BEFORE THE DECISION IS MADE?	HOW WILL THE CONSULTATION TAKE PLACE?	HOW CAN YOU MAKE COMMENTS ON THE DECISION BEFORE IT IS MADE?	WILL THIS ITEM BE CONSIDERED IN PUBLIC OR IN PRIVATE?	WHAT SUPPORT DOCUMENTS AND OTHER INFORMATION WILL BE AVAILABLE?
ESSENTIAL HOUSEHOLD GOODS CONTRACT EXTENSION	Director of Housing, Planning, Property and Regeneration	September 2023	Email	Contact Officer: Tracey Wilson Tel: 020 8313 4515 <a href="mailto:tracey.wilson@bromley.gov.uk">tracey.wilson@bromley.gov.uk</a>	<u>Part 1 Decision Statement</u>	Report and relevant background documents
PERFORMANCE OF THE LIBRARIES CONTRACT SIX MONTH REVIEW	Portfolio Holder for Renewal, Recreation and Housing	November 2023 Renewal, Recreation and Housing PDS Committee	Meetings	Contact Officer: Paula Young Tel: 020 8461 7281 <a href="mailto:Paula.Young@bromley.gov.uk">Paula.Young@bromley.gov.uk</a>	<u>Meeting in public</u>	Report and relevant background information
MOTTINGHAM LEARNING SHOP	Portfolio Holder for Renewal, Recreation and Housing	November 2023 Renewal, Recreation and Housing PDS Committee	Meetings	Contact Officer: Lydia Lee Tel: 020 8313 4456 <a href="mailto:lydia.lee@bromley.gov.uk">lydia.lee@bromley.gov.uk</a>	<u>Meeting in public</u>	Report and relevant background documents
REGENERATION STRATEGY UPDATE	Portfolio Holder for Renewal, Recreation and Housing	November 2023 Renewal, Recreation and Housing PDS Committee	Meetings	Contact Officer: Lydia Lee Tel: 020 8313 4456 <a href="mailto:lydia.lee@bromley.gov.uk">lydia.lee@bromley.gov.uk</a>	<u>Meeting in public</u>	Report and relevant background documents

WHAT IS BEING DECIDED?	WHO IS THE DECISION MAKER?	WHEN WILL THE DECISION BE MADE AND WHO WILL BE CONSULTED BEFORE THE DECISION IS MADE?	HOW WILL THE CONSULTATION TAKE PLACE?	HOW CAN YOU MAKE COMMENTS ON THE DECISION BEFORE IT IS MADE?	WILL THIS ITEM BE CONSIDERED IN PUBLIC OR IN PRIVATE?	WHAT SUPPORT DOCUMENTS AND OTHER INFORMATION WILL BE AVAILABLE?
CRYSTAL PALACE UPDATE	Portfolio Holder for Renewal, Recreation and Housing	November 2023  Renewal, Recreation and Housing PDS Committee	Meetings	Contact Officer:  Alicia Munday Tel: 020 8313 4559 <a href="mailto:Alicia.Munday@bromley.gov.uk">Alicia.Munday@bromley.gov.uk</a>	<u>Meeting in public</u>	Report and relevant background documents
LONE WORKER DEVICES	Director of Housing, Planning, Property and Regeneration	December 2023	Email	Contact Officer:  Tracey Wilson Tel: 020 8313 4515 <a href="mailto:tracey.wilson@bromley.gov.uk">tracey.wilson@bromley.gov.uk</a>	<u>Part 1 Decision Statement</u>	Report and relevant background documents
<b>RESOURCES, COMMISSIONING &amp; CONTRACT MANAGEMENT PORTFOLIO</b>						
CONTRACT EXTENSION - COUNTER FRAUD SERVICES	Portfolio Holder for Resources, Commissioning and Contracts Management	Before 1 September 2023  Executive, Resources and Contracts PDS Committee	Meetings	Contact Officer:  Francesca Chivers  <a href="mailto:Francesca.Chivers@bromley.gov.uk">Francesca.Chivers@bromley.gov.uk</a>	<u>Report is expected to be considered in the public part of the meetings with exempt material considered during confidential proceedings.</u>	Report and relevant background documents
<b>SUSTAINABILITY, GREEN SERVICES AND OPEN SPACES</b>						

WHAT IS BEING DECIDED?	WHO IS THE DECISION MAKER?	WHEN WILL THE DECISION BE MADE AND WHO WILL BE CONSULTED BEFORE THE DECISION IS MADE?	HOW WILL THE CONSULTATION TAKE PLACE?	HOW CAN YOU MAKE COMMENTS ON THE DECISION BEFORE IT IS MADE?	WILL THIS ITEM BE CONSIDERED IN PUBLIC OR IN PRIVATE?	WHAT SUPPORT DOCUMENTS AND OTHER INFORMATION WILL BE AVAILABLE?
KELSEY PARK BRIDGES	Director of Environment and Public Protection	Between 2 October 2023 and 31 January 2024	Email	Contact Officer: David Braybrook Tel: 020 8313 4440 <a href="mailto:david.braybrook@bromley.gov.uk">david.braybrook@bromley.gov.uk</a>	<u>Private delegated decision.</u>	Part 1 Decision Statement
<b>TRANSPORT, HIGHWAYS AND OPEN SPACES</b>						

London Borough of Bromley: 020 8464 3333 [www.bromley.gov.uk](http://www.bromley.gov.uk)

Contact Officer: Philippa Gibbs, Chief Executive's Department: 020 8461 7638, [philippa.gibbs@bromley.gov.uk](mailto:philippa.gibbs@bromley.gov.uk)

## London Borough of Bromley

### PART ONE - PUBLIC

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**Decision Maker:** EXECUTIVE, RESOURCES AND CONTRACTS POLICY  
DEVELOPMENT AND SCRUTINY COMMITTEE

**Date:** 18 September 2023

**Decision Type:** Non-Urgent Non-Executive Non-Key

**Title:** SCRUTINY OF THE CHIEF EXECUTIVE

**Contact Officer:** Ade Adetosoye CBE, Chief Executive  
Tel: 020 8313 4197 E-mail: [ade.adetosoye@bromley.gov.uk](mailto:ade.adetosoye@bromley.gov.uk)

**Chief Officer:** Ade Adetosoye CBE, Chief Executive

**Ward:** All Wards

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1. Reason for report

This report provides a written update to inform the scrutiny of the Chief Executive at Executive, Resources and Contracts PDS Committee.

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2. **RECOMMENDATION(S)**

**Members are requested to note the report.**

### **3. COMMENTARY**

#### **Introduction**

- 3.1 Since my previous scrutiny session in March 2023, I can provide the following updates:
- Updates on key organisational priorities for 2023/24.
  - Priorities for the next six months.

#### **Updates on Key Organisational Priorities for 2023/24**

##### **Financial Management**

- 3.2 The 2023/24 Council Tax Report to Executive on 8 February 2023 identified a balanced budget in 2023/24 and a budget gap of £1.7 million in 2024/25, rising to £10.1 million in 2025/26 and £29.6 million per annum by 2026/27.
- 3.3 There also remains risks in meeting the budget gap arising from budget savings, mitigation options to address cost pressures, as well as ongoing cost pressures arising from new burdens, the ongoing high inflation, and the impact of Government policy changes and other burdens such as, no recourse to public funds, automatic enrolment, various changes from the Social Work Act and Adult Social Care Reforms, extended support to care leavers to the age of 25 years old, the previous lifting of the public sector pay cap, indexation and equalisation of guaranteed minimum pensions, deprivation of liberty, national living wage, the Homelessness Reduction Act, and other examples where such burdens have not been adequately funded.
- 3.4 In response to these challenges, we continue with the One Council Transformation approach, delivering planned mitigation and Transformation savings, as well as minimising any further cost/ growth pressures by identifying options from 2024/25 to address the medium-term budget gap and ensure the Council can continue to 'live within its means'.
- 3.5 The Senior Leadership Team and I keep a close focus on the monitoring of the Council's budget at meetings of Chief Officer's Executive (COE) and budget challenges sessions. Equally, fortnightly meetings of Transformation Board continue to monitor delivery against agreed savings, alongside identifying other opportunities to generate savings and cost efficiencies.

##### **Delivery of Transforming Bromley Programme and Transforming Bromley Roadmap for 2024 – 2028**

- 3.6 The 2019 – 2023 Transforming Bromley Programme covered a whole Council approach, and this has been a helpful and inclusive approach for all staff to contribute and take responsibility for 'Transforming Bromley'.
- 3.7 Collectively the Council has delivered a balanced budget over the last four years, and the Council has met its financial obligations to ensure value for money for residents through efficient and effective use of monies.

- 3.8 In terms of future transformation, the 2023/24 Budget includes the full year effect of the Phase Two Transformation Savings combined with new changes, totalling £2.9 million in 2023/24 increasing to £4.5 million per annum from 2026/27.
- 3.9 The Council is in the process of a refresh of the Transforming Bromley Roadmap for 2024 – 2028, and a Strategic Transformation Development Board (STDB) has been meeting on a fortnightly basis to help identify key issues in the following six areas over the next four years to help inform the direction of the Programme going forward:
1. Integrated Commissioning Board/ Health.
  2. Economic Development.
  3. Assisted Technology/ Adult Social Care.
  4. Environment.
  5. Workforce of the future – fit to succeed.
  6. Customer experience – digitalisation of services.

## **Inspection Readiness**

### Children's Services

- 3.10 Both Children's and Adults Services have made significant preparations in readiness for inspection this year.
- 3.11 Children's Services in anticipation of the upcoming inspection held its Annual Engagement meeting with Ofsted in March, which is an opportunity to set out the positive work that has been undertaken to support our young people. The discussion covered the wide range of ways the Council works with its schools to ensure sufficient school places, support educational attainment and attendance, as well as focusing on safeguarding issues and the level of care provided to our Children in Care.
- 3.12 Feedback following the meeting highlighted a number of achievements that have been worked on over the past year, including initiatives such as the launch of 'Our House', and how the Service has managed to reduce the numbers of children between 0 – 5 years coming into care. The Service was also recognised for its strong early years provision available for pre-school children, as well as how it prepares children to start school ready to learn. In addition, work to support emotional health and wellness in schools to reduce escalation of mental health concerns was recognised positively.
- 3.13 Overall, Ofsted representatives were complimentary about the initiatives they heard about, which is hoped will assist in setting a positive tone in readiness for the anticipated inspection.

### Youth Justice Service

- 3.14 The work of the Youth Justice Service (YJS) is overseen by an Improvement Board and a Challenge Board as it continues on a journey of preparing for external inspection from His Majesty Inspectorate of Probation.

- 3.15 In readiness for inspection, regular audit cycles of practice have been carried out, with the Quality Assurance Framework aligned with Children's Social Care and joint work carried out as part of the audit of Youth Justice cases and in turn Youth Justice Managers audit Social Work cases, which has provided an invaluable insight and understanding of the work of both Service areas. On a monthly basis six cases from the YJS are audited, and feedback and development work are provided, and any remedial work completed where required.
- 3.16 The feedback from this work over the last six months has been positive with strong practice and management oversight and direction being evidenced in practice.

#### Adult Services

- 3.17 In Adult Services, a great deal of preparatory work has been undertaken, including carrying out self-assessments, updating policies and practice guidance, working with staff to prepare them for the reintroduction of an Assurance Process and gathering evidence that could be shared with the Care Quality Commission (CQC) as part of the process when they visit Bromley.
- 3.18 Draft guidance has been received from the CQC regarding the Assurance process, with six authorities trialling the process.
- 3.19 The Department aims to be graded as highly as possible and based on all the work being undertaken around Transformation and reform, the Department stands in good stead. Going forward, the Assurance visit will remain one of the major focuses for the Service.
- 3.20 Alongside CQC Assurance preparedness, the Adults Directorate has also continued its preparations for inspection of its Adult Education and Shared Lives Services, which are both expected imminently.

#### **Ukraine Response**

- 3.21 The Homes for Ukraine Scheme launched on 14 March 2022 by the Secretary of State for Levelling Up, Housing and Communities. 791 guests (409 families) have arrived in the borough under the scheme to date, and it is assumed that many, in addition have also arrived to live with existing family members. 243 children have also arrived under Homes for Ukraine, with significant numbers also seen arriving under the family placement scheme.
- 3.22 The Council has been receiving £10,500 quarterly in arrears for every guest, and an additional £2.1 million Education Grant, which has been used to assist families with community integration, education, and employment opportunities.
- 3.23 A weekly Ukraine Support Hub was established that has provided support from a range of internal and external organisations, including Housing, Department for Work and Pensions (DWP), Education, Social Care, Public Health, Bromley Y, HR Recruitment etc., which has proved helpful for guests and sponsors alike, with each Hub attended by at least 50 people. Fortnightly meet up sessions have also been held at Bromley Central Library to provide guests and sponsors a space to meet other people from their local community and make connections.
- 3.24 The Council also held, for a consecutive year, a celebration to mark Ukraine



Independence Day on Thursday 24 August 2023, which was well attended.

3.25 The work provided by the Council is important as a preventative measure to support both sponsors and guests to avoid potential problems and relationship breakdown leading to homelessness, and the Team will optimise the resources available to continue to support our Ukrainian guests.

### **Health and Care Integration**

3.26 The new South East London Integrated Care System (SELICS) arrangements came into effect in July last year and built on existing relationships and ways of working that were already in place. Since, the SELICS 'Integrated Care Strategic Priorities for 2023-28' Strategy has been developed and launched, which identifies the cross-system priorities for improving health and care.

3.27 Some of the key projects and innovations the Council and ICB have led on in the last few months include:

- The recommissioning of Mental Health Recovery and Rehab Support and Accommodation, to support rehabilitative accommodation schemes for residents being discharged from hospital.
- Created a joint Team to administer Personal Health Budgets, which has created cost efficiencies.
- Jointly commissioned the hospital Discharge and Single Point of Access (SPA) as a permanent service.
- Refreshed and republished the Integrated Mental Health and Wellbeing Strategy, focusing on the impact of the Pandemic on children's and adult emotional wellbeing.
- Implemented a new therapies response to falls and developed pathways with King's College Hospital NHS Trust.
- Developed a new Adult Mental Health Hub, that has provided a single point of access for community mental health services.
- Took a joint approach to an all-age Autism Strategy that aims to ensure equality of access to universal services and produced an Action Plan.
- Made Primary Care improvements including the expansion of Primary Care Teams with Pharmacists, Physio, Mental Health and Paramedics.

3.28 Moreover, in response to guidance on Health and Wellbeing Boards issued by the Government in November last year, Angela Bhan, the Bromley Place Executive Director was confirmed as an ICB representative on the Health and Wellbeing Board, so as to further support more joined up planning and working.

3.29 A key area of joint strategic planning in recent months has been the development of a joint Health and Wellbeing Board, which will have the following three priority areas:

1. Improving Health and Wellbeing of young people (to include obesity, youth

- violence, adolescent mental health).
2. Improving Health and Wellbeing of Adults (to include obesity, diabetes, dementia, mental health, substance misuse).
  3. Disease prevention and helping people to stay well (linking in with the ICB prevention priority and achieving this through the Vital Five work).
- 3.30 The priority areas identified are in alignment with other strategies including the SELICS Strategy, and those currently in development such as the One Bromley Five Year Strategy.

### **Adult Social Care Reforms**

- 3.31 The Department has delivered on a number of key pieces as part of preparations for the introduction of the Adult Social Care Reforms, which have continued despite the Government's announcement that implementation would be delayed.
- 3.32 The required return to the Department of Health and Social Care (DHSC) in October 2022 was submitted with detailed returns from providers completed from a large section of the provider market, which aided the completion of the Market Sustainability Plan. This exercise also confirmed the expected challenges created by having a large private market accessed by 50% of those seeking and paying for care themselves.
- 3.33 As part of mitigation work, a piece of work looking at how the Department can complete assessments using IT and providing the opportunity for people to self-assess is in progress, which is hoped to minimise the need for additional staff. Alongside this, and in response to evidence around those going into care homes due to unawareness of other opportunities, has inspired a piece of work to provide advice to service users to check that all options have been explored, and reminding residents of the alternative support available, which is hoped to reduce numbers into the Service and support more people at home.
- 3.34 Moreover, preparations for the planned re-introduction of an assurance process with Care Quality Commission (CQC) have progressed, which has included ensuring policies and practice are aligned, good application of financial and performance data and that the impact of the work could be evidenced. The department has also continued to work with the voluntary sector, as well as Providers and those that use Services to develop practice.

### **Housing Supply and Affordable Housing**

- 3.35 Schemes to support residents through the provision of cost-effective housing supply include our More Homes Bromley SPV, Meadowship Homes Scheme and self-delivery programmes.
- 3.36 The More Homes Bromley SPV joint partnership between the Council and Mears Group to acquire up to 400 properties currently holds 360 properties located within and outside of the borough.
- 3.37 The Scheme initially operated as temporary accommodation for homeless

households who, after a period of time moved on to alternative accommodation. However, approximately 213 tenancies have been converted from temporary to settled accommodation. Meaning that those housed there can remain in those properties indefinitely and will not have to face the disruption of further move on. It is expected that approximately 300 units of accommodation within the Scheme will be utilised as settled accommodation with the remainder continuing as temporary accommodation in order to give officers flexibility in terms of nominations.

- 3.38 In terms of Phase One of the Council's Limited Liability Partnership (LLP) arrangement with Orchard and Shipman for the acquisition, refurbishment, and management of approximately 242 residential properties for use as affordable rented accommodation, predicted targets are expected to be exceeded, with 255 units to be completed and tenanted by next month (October 2023).
- 3.39 Due to the success of Phase One, additional funding for a second phase to purchase approximately 186 additional units of accommodation commenced in April.
- 3.40 All homes purchased are compliant with required standards and are rented at an affordable level in line with Local Housing Allowance levels. This ensures that tenants are able to maintain their tenancies and not fall into debt.
- 3.41 Together, these key pieces of work are assisting in meeting the Council's statutory rehousing duties and reducing the current reliance on and associated costs of nightly paid accommodation.
- 3.42 As for our Housing Delivery Programme, three affordable housing sites (Bushell, Anerley and Burnt Ash) have now completed, with another (York Rise) under construction.
- 3.43 Additional sites in the pipeline include the West Wickham Library and housing site, which is a mixed-use scheme comprising of housing (26 homes consisting of 14 affordable and 12 private sale homes to generate a capital receipt to provide funding towards community elements) and a library refurbishment scheme, including outdoor activity space. Both the housing and library construction contracts have now commenced and are on track.
- 3.44 Also, an appraisal of the Bromley North site, which is expected to deliver 38 affordable and 37 private units is in progress, and a planning application has been submitted. The viability of the Beckenham Triangle housing site scheme is currently being assessed.

### **Homelessness**

- 3.45 The Council is currently in the process of refreshing its Homelessness Strategy for publishing next April. The new five-year Strategy will provide an overview of existing Services and initiatives in place to prevent homelessness and outline the priorities and objectives that will inform the development of our Homelessness Services in future years.
- 3.46 Homelessness approaches to the Council remain consistently high for reasons

including people being asked to leave their current accommodation, people becoming homeless and having nowhere to go, and also those fleeing domestic abuse.

- 3.47 A triage system is working well to ensure customers are seen quickly, but to further improve our response, the Team are exploring ways to increase the range of housing options available through delivery of new build schemes and Meadowship properties, preventing and relieving homelessness in line with the Homelessness Reduction Act 2017, and reducing the number requiring a full main duty assessment.

### **Operational Property Review**

- 3.48 The Council's Operational Property Review sought to identify the optimal operational estate and understand the liability of it over a ten-year period, together with the potential to undertake minor refurbishments where appropriate to minimise future liability.
- 3.49 The findings of this Review and the adoption of the Operational Estate Strategy were reported and agreed at the Executive in November 2022.
- 3.50 A number of workstreams have now been taken forward as part of this key programme for the Council, which includes:

#### Workstream One: Future of HQ Accommodation

To progress the Council's relocation from its existing site to Churchill Court, which saves the need to refurbish the Civic Centre and the need to clear the maintenance liability. The purchase price of the new building will be offset by the disposal of the existing Civic Centre site.

#### Workstream Two: Churchill Theatre and Central Library

To open negotiations with the Trafalgar Theatre Group to see if agreement can be reached on a more sustainable future for the theatre, which, in return for an initial investment, would see the Council relinquishing its liability for ongoing maintenance of the theatre.

#### Workstream Three: Dispose of Properties not Required to Deliver Services

To divest assets which are either surplus to requirements, produce poor returns or are likely to do so, and those where long lease interests could be released by disposal through calculation of marriage value. Disposals are estimated to generate circa £65.8 million by the end of 2023/24.

#### Workstream Four: Refurbishment

To carry out further investigative works of Children and Family Centres, SEN Services, Adult Day Centres and Care Homes, Libraries, Parks Buildings, GM Depots, Youth Centres etc. to confirm the costs of refurbishments and report back to the Executive as a series of costed packages for consideration to award works.

#### Workstream Five: Sites to be Developed for Council Housing Schemes

To take forward feasibility studies and business cases for sites including Station road (Bromley North), Spa Leisure Centre Car Park/ Lewis House (Beckenham Triangle), Manofields, Cornwall Drive, which are believed to have potential for housing delivery, delivering up to 200 additional affordable units with associated Temporary Accommodation savings.

- 3.51 A report seeking the procurement and award of expert advice to inform appraisal work, scoping and contractor procurement to implement the refurbishment work, and the procurement of building contractors to deliver the Operational Property Refurbishment Programme was approved at Executive in March.
- 3.52 As soon as work packages are scoped and costed, these will be reported to the Executive for consideration to proceed and award works packages.

### **Digital Strategy**

- 3.53 A number of pieces have been progressed as part of the Council's digitalisation journey. In particular, those directly focused on 'enabling infrastructure' and supporting a better 'digital experience'.
- 3.54 The Adults Services have continued to exploit the benefits of digitalisation in service delivery through a new Digital Strategy, integrating systems and processes where it is feasible and practical.
- 3.55 Liquidlogic has been implemented for Adult Social Care and priorities for the coming months are online portals that allow self-assessments, professional referrals, and financial calculations to be made and fed directly into the Liquidlogic Adults' Social Care System Software (LAS).
- 3.56 Additionally, the use of Assistive Technology to enable residents to remain in their homes has developed. This has included a pilot for wearable GPS tracking devices that alerts next of kin when a resident leaves a designated area around their property to ensure their safety and providing carer reassurance.
- 3.57 The Service continues to assess residents when discharged from hospital with enhanced packages of care incorporating activity monitoring systems as part of the assessment process aimed at reviewing high level of care including 24-hour care. This includes monitoring safety and possibility of falls at night. Also, work is underway with London Ambulance Service and Occupational Therapy to design new referral pathways and procedures for identifying appropriate residents for assistive technology and CareLink.
- 3.58 Other projects include a pilot of ten activity monitoring systems that are supporting early assessment and identification of need for clients to return to previous levels of function and decrease reliance on long-term domiciliary care. Also, access to the referral process for assistive technology by health professionals and provider services went live in October last year, which is reducing time needed to process referrals.
- 3.59 Plans are now underway to implement and review assistive technology models for Reablement, Autism and Learning Disabilities, self-care for residents with long-term Covid, Hospital discharge step down flats and the Community Falls

Service.

- 3.60 Children's Services have also benefited from greater digitalisation, with new Microsoft Power BI Dashboards developed to enable greater management oversight. A SEND Transport route optimisation solution is now in place and supporting effective planning of routes. Also, Virtual Reality (VR) headsets are being used across Children's Services, with 38 practitioners now trained as VR Practitioners across Children's Social Care as of April 2022 to date, and virtual reality training extended to Bromley Foster Carers in the last year.
- 3.61 In Customer Services, as part of improving 'customer journeys', a proof of concept (POC) VoiceBot has been trialled, which has provided assistance and information to customers of the Service over the phone, and signposting to online content and services where appropriate. Plans for the future development of services are expected to cover the current Corporate Services that are delivered in the Corporate Contact Centre along with the Revenues and Benefits Services.
- 3.62 Moreover, following full membership to the Local London Sub-Regional Partnership (SRP), the Council has unlocked the opportunity to apply to the GLA for Strategic Investment Fund. If successful, plans are to use funding to connect sites in the borough that currently do not have access to full fibre, by deploying new dark fibre infrastructure to enable the upgrade of Council-owned sites and buildings, including extra capacity for additional commercial investment in the Borough.

## **Environment and Public Protection**

- 3.63 The Directorate has delivered on a number of its key priorities over the last few months. These have included:
- Street Lighting LED Upgrade has continued to reap significant energy and carbon savings, as evidenced by a 21% annual reduction.
  - Four new active air quality monitors have been installed across the borough, and nitrogen dioxide levels have seen a reported decrease in line with national guidelines.
  - Three sites have been identified with potential for woodland establishment, with grant funding secured from the Forestry Commission to do detailed design work and consultation as part of the next stage of feasibility.
  - Launched a new Veolia and Street Friends anti-littering campaign.
  - Developed the Council's 'Reduction and Recycling Plan 2023 – 2025', which seeks to minimise waste and maximise recycling and reduce the Council's impact on the environment over the next two years.
  - Begun collaborative work as part of the development of the new 'Community Safety Strategy 2024 – 2027'.
  - Maintaining and investing in the Council's two Waste Transfer Stations

through a Depot Infrastructure Programme, tendering contracts for the delivery of major capital works programme involving improvements to the surface water drainage, hard standing areas and building infrastructure at the Waste Transfer Stations for works to commence in early 2024.

## **Public Health**

3.64 Public Health have continued to work on the delivery of a number of key pieces of work for the Department, this includes:

- Launched the Staff Health Checks for those aged 50+ to support the delivery of the national programme.
- Refreshing the Health and Wellbeing Strategy.
- Increasing the uptake of health improvement programmes such as the Cardio-Vascular Programme, Diabetes Programme and Cancer Screening Programme.
- Supporting Partners with the delivery of other local health initiatives, such as weight management.
- Updating disease management work in preparation of the potential emergence of new diseases.
- Supporting prevention work with colleagues in the Criminal Justice System.
- Continuing important health interventions around substance misuse and hidden harm.
- Recommissioning the Substance Misuse Service and implementing the Combatting Drugs Action Plan.
- Continuing with Transformation work on sexual health.
- Delivering JSNA chapters on a number of identified health trends.

## **Regeneration**

3.65 The Regeneration Department continues to deliver against the borough's 'Regeneration Strategy 2020 to 2030', and key projects include:

### Regeneration Capital Projects

- Bromley High Street Improvement Works (capital works including electrics, planting, paving and lighting) – progress has been made and lighting tests have been taken, with expected date for completion this October.
- Penge High Street and Beckenham High Street Works (capital works including electrics, planting, paving and lighting) – main works are now complete in both areas and are in the final snagging period.

- Crystal Palace Park Regeneration:
  - Phase One – Regeneration of the historic 200-acre park – planning permission has been secured and subway restoration is now complete.
  - Phase Two – an additional grant has been secured from Historic England and Subway works are on track for completion.
  - Restoration of the dinosaurs and the Italian terraces – National Lottery Heritage Fund Grant secured, and multi-disciplinary tender process has been completed with award reported to Executive in May.
- Orpington Town Centre Developing (including a refurbished or new leisure centre) – a contract with Alliance is now in place.
- Beckenham Public Hall – disposal of the site has been agreed as part of the OPR.
- Review for potential commercial and community use of disused park buildings – a tender process has started to inform this work.

#### OPR and Strategy

- Options Appraisal Community Resource Centres – a building review has been undertaken and the libraries at Mottingham and St Paul's Cray were identified as the most suitable for relocation. Castlecombe is being considered for Mottingham longer term, so works have only commenced on the St Paul's Cray site.
- Leisure Strategy and Review – the Strategy has been produced and is at the review stage.

#### Culture and Events

- Redevelopment of West Wickham Leisure Centre – contract with Alliance has commenced and work is on track.
- Armed Forces Covenant Refresh – new Covenant has been signed and an Action Plan is in delivery.

#### Economic Development

- Night Time Enterprise Zone (GLA funded improvements to Town Centre to encourage evening activity) – programme continues with first claim submitted in March 2023.
- West Wickham library enhancements and business support – submitted Interim Borough Return to GLA in April 2023 for UKSPF SLB and Community and Place Programmes.
- Digital Infrastructure Works – works continue to better connect the borough.



### **Priorities for the Next Six Months**

- 4.1 The key organisational priorities for the next six months are:
1. Delivery of Transforming Bromley Programme.
  2. Maintain our Long-Term Budget Management and Financial Strategy to manage demand and growth.
  3. Move the Council's Hub to the new Civic office.
  4. Delivery of our Operational Property Programme.
  5. Meet our statutory and regulatory requirements and inspection readiness.
  6. Supporting our workforce
  7. Support organisational compliance against all standards and regulations.
  8. Respond to legislative changes and macro issues from Central Government.
  9. Inspection and regulatory readiness
  10. Partnerships and improved interface with elected members on ward related issues.

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Report No.  
FSD23054

London Borough of Bromley

PART ONE - PUBLIC

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**Decision Maker:** PORTFOLIO HOLDER FOR RESOURCES, COMMISSIONING AND CONTRACT MANAGEMENT

**Date:** For pre-decision scrutiny by the Executive, Resources and Contracts Policy Development and Scrutiny Committee on 18 September 2023

**Decision Type:** Non-Urgent Executive Non-Key

**Title:** CAPITAL PROGRAMME MONITORING - QUARTER 1 2023/24

**Contact Officer:** Sean Cosgrove, Principal Accountant  
Tel: 020 8313 4792 E-mail: [sean.cosgrove@bromley.gov.uk](mailto:sean.cosgrove@bromley.gov.uk)

**Chief Officer:** Director of Finance

**Ward:** All

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1. Reason for report

On 20 September 2023, the Executive will receive a report summarising the current position on capital expenditure and receipts following the first quarter of 2023/24 and be asked to agree a revised capital programme for the five-year period 2023/24 to 2027/28. This report highlights changes to be put to the Executive and the Leader in respect of the capital programme for the Resources, Commissioning and Contract Management portfolio. The revised programme for this portfolio is set out in Appendix A and detailed comments on individual schemes are shown in Appendix B; while Appendix C details the variance between the 2022/23 budget and the outturn position at year end. .

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2. **RECOMMENDATIONS**

**The Portfolio Holder is asked to note and acknowledge the changes to be put to the Executive on 20 September 2023.**

## Impact on Vulnerable Adults and Children:

### 1. Summary of Impact:

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#### Corporate Policy

1. Policy Status: Existing Policy: capital programme monitoring is part of the planning and review process for all services. Capital schemes help to maintain and improve the quality of life in the borough. Effective asset management planning (AMP) is a crucial corporate activity if a local authority is to achieve its corporate and service aims and objectives and deliver its services. For each of our portfolios and service priorities, we review our main aims and outcomes through the AMP process and identify those that require the use of capital assets. Our primary concern is to ensure that capital investment provides value for money and matches the Council's overall priorities as set out in the Community Plan and in "Making Bromley Even Better". The capital review process requires Council Directors to ensure that bids for capital investment provide value for money and match Council plans and priorities.
2. BBB Priority: Excellent Council

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#### Financial

1. Ongoing costs: Not Applicable
2. Budget head/performance centre: capital programme
3. Total current budget for this head: £79,803k for the Resources, Commissioning and Contract Management portfolio over the four years 2023/24 to 2027/28
4. Source of funding: capital grants, capital receipts and earmarked revenue contributions

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#### Personnel

1. Number of staff (current and additional): 1fte
2. If from existing staff resources, number of staff hours: 36 hours per week

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#### Legal

1. Legal Requirement: Non-Statutory - Government Guidance
2. Call-in: Applicable

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#### Procurement:

1. Summary of Procurement Implications:

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#### Customer Impact

1. Estimated number of users/beneficiaries (current and projected): N/A

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#### Ward Councillor Views

1. Have Ward Councillors been asked for comments? N/A
2. Summary of Ward Councillors' comments: N/A

### 3. COMMENTARY

#### Capital monitoring – variations to be put to the Executive on 20 September 2023

- 3.1 A revised capital programme will be put to the Executive on 20 September 2023, following a detailed monitoring exercise carried out after the first quarter of 2023/24. The base position is the programme approved by the Executive on 18 January 2023. All changes to schemes in the Resources, Commissioning and Contract Management portfolio programme are itemised in the table below and further details are included in paragraphs 3.2 to 3.5. The revised programme for the Resources, Commissioning and Contract Management portfolio is attached as Appendix A, whilst Appendix B shows actual spend against budget as at the first quarter of 2023/24, together with detailed comments on individual scheme progress; and Appendix C shows the outturn position for 2022/23.
- 3.2 If all the changes proposed in this report are approved, the total capital programme 2023/24 to 2027/28 would decrease for presentational purposes by £63,167k.

	Budget 2023/24	Budget 2024/25	Budget 2025/26	Budget 2026/27	Budget 2027/28	Total
	£'000	£'000	£'000	£'000	£'000	£'000
Programme approved by Executive 18/01/23	54,313	19,607	25,864	1,500	0	101,284
Net underspend 22/23 rephased to 23/24	32,686					32,686
<b>Approved programme prior to Q3 monitoring</b>	<b>86,999</b>	<b>19,607</b>	<b>25,864</b>	<b>1,500</b>	<b>0</b>	<b>133,970</b>
Net rephasing from 23/24 to future years (p. 3.4)	Cr 6,831	3,416	3,415	0	0	0
Allocation of Property Investment Fund to housing projects (p. 3.3)	Cr 11,688					Cr 11,688
Change in presentation for OPR (p. 3.3)	Cr 13,025	Cr 16,587	Cr 17,117	0	0	Cr 46,729
<b>S/T - changes not requiring Executive approval</b>	<b>Cr 31,544</b>	<b>Cr 13,171</b>	<b>Cr 13,702</b>	<b>0</b>	<b>0</b>	<b>Cr 58,417</b>
Supplementary estimate: Churchill Court (p. 3.5)	0	4,250	0	0	0	4,250
<b>S/T - changes requiring Executive approval</b>	<b>0</b>	<b>4,250</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>4,250</b>
<b>Revised RCCM capital programme</b>	<b>55,455</b>	<b>10,686</b>	<b>12,162</b>	<b>1,500</b>	<b>0</b>	<b>79,803</b>

- 3.3 Variations not requiring the approval of Executive (£11,688k total net decrease)

#### *Allocation of Property Investment Fund to housing projects (net decrease of £11,688k)*

There has been a reduction in the Property Investment Fund budget to reflect the fact that funding had previously been allocated from the Investment Fund earmarked reserve for affordable housing schemes. The impact is a net decrease of £11,688k.

#### *Changes in presentation re: OPR (£46,729k net decrease, presentational only)*

When the Operational Property Review (OPR) was added to the Council's capital programme in January 2023 it was presented for monitoring purposes as a single overarching project, with a separate budget for leisure centres, which fell within the Renewal, Recreation and Housing portfolio. Subsequent work has now disaggregated this larger budget and it has been decided to reflect projects in the appropriate portfolio (though overall project management for all non-RRH schemes remains within Resources, Commissioning and Contract Management.) As such, only two OPR schemes – surface car parks and cemetery properties – are now to be monitored in

reports to the Resources, Commissioning and Contract Management portfolio holder. The budgets for contingency and for the Churchill Theatre also remain within this portfolio. Budgets include an element of the delivery budget, which has been apportioned out across schemes for reporting to the OPR Board. The total change for this portfolio, which is purely presentational and does not represent any change in total resources, is a decrease of £46,729k.

### 3.4 Scheme re-phasing

As part of the Q1 monitoring exercise, a total of £6,831k has been specifically re-phased from 2023/24 into future years to reflect revised estimates of when expenditure is likely to be incurred. Scheme re-phasings are itemised in the table below and comments on scheme progress are provided in Appendix B.

	Budget 2023/24	Budget 2024/25	Budget 2025/26	Budget 2026/27	Budget 2027/28	Total
	£'000	£'000	£'000	£'000	£'000	£'000
Property Investment Fund	Cr 6,831	3,416	3,415	0	0	0
<b>Total for portfolio</b>	<b>Cr 6,831</b>	<b>3,416</b>	<b>3,415</b>	<b>0</b>	<b>0</b>	<b>0</b>

### 3.5 Variations requiring the approval of the Executive (£4,250k net increase)

#### *Churchill Court (£4,250k net increase)*

Approval will be sought to add a supplementary estimate of £4,250k to the Churchill Court programme in 2024/25 to cover inflationary pressures. The costs of this increase will be met from £2,000k from contingency, and £2,250k from the Growth Fund.

### 3.6 Post-completion reports

Under approved capital programme procedures, capital schemes should be subject to a post-completion review within one year of completion. These reviews should compare actual expenditure against budget and evaluate the achievement of the scheme's non-financial objectives. Post-completion reports on the following schemes are currently due for the Resources, Commissioning and Contract Management portfolio:

- Upgrade of Core Network Hardware
- Replacement of Storage Area Network
- Rollout of Windows 7 and Office 2000
- Replacement of MD110 Telephone Switch
- Windows Server 2003 Replacement Programme

## 4. POLICY IMPLICATIONS

4.1 Capital programme monitoring and review is part of the planning and review process for all services. The capital review process requires Chief Officers to ensure that bids for capital investment provide value for money and match Council plans and priorities.

## 5. FINANCIAL IMPLICATIONS

5.1 These will be reported in full to the Executive on 20 September 2023. Changes to be put to the Executive for the Resources, Commissioning and Contract Management portfolio capital programme are set out in the table in paragraph 3.1.

<b>Non-applicable sections:</b>	Legal, Personnel and Procurement Implications, Impact on Vulnerable Adults and Children
Background documents: (Access via contact officer)	Capital programme monitoring Q4 2022/23 (Executive 05/07/2023) Capital programme monitoring Q3 2022/23 (Executive 18/01/2023)

**EXECUTIVE, RESOURCES & CONTRACTS PORTFOLIO - APPROVED CAPITAL PROGRAMME Q1 2023/24**

Scheme	Total approved estimate	Spend up till 31.03.23	Estimate 2023/24	Estimate 2024/25	Estimate 2025/26	Estimate 2026/27	Estimate 2027/28	Responsible officer	Remarks
	£'000	£'000	£'000	£'000	£'000	£'000	£'000		
Emergency Works on Surplus Sites	312	265	47	0	0		0	Watkins, Mike	(Block Capital) Essential to maximise capital receipts
Property Investment Fund	103,895	97,064	0	3,416	3,415		0	Watkins, Mike	Various property acquisitions - met from Property Investment Fund, Growth Fund, and Capital Receipts
Churchill Court	38,000	466	33,284	4,250	0		0	Watkins, Mike	Approved Executive 18/05/16 and Council 04/07/16; revision to be put to Executive 30 November 2022
Property Disposal/Feasibility Work - Growth Fund	250	224	26	0	0		0	Watkins, Mike	Executive 24th May 2017. Funded by the Growth Fund
Property Management System	175	118	57	0	0		0	Jackson, Hannah	Approved by the Leader on 10/09/2020 Funded from revenue receipts
Existing consolidated OPR budgets	62,958		22,567	17,567	22,824				
OPR budgets reflected in individual portfolios	-57,701		-22,567	-17,567	-17,567			Darren Essex	
OPR - surface car parks	1,060		530	530				Darren Essex	
OPR - cemetery properties	912		12	450	450			Darren Essex	
OPR - Churchill Theatre	5,000		5,000					Darren Essex	
OPR - contingency	4,000		4,000					Darren Essex	
North Block solar PV Installation	100	0	100	0	0		0	Bowrey, Sara	Exec 030/03/22
Health & Wellbeing Centre	10,119	231	9,887	0	0		0	Watkins, Mike	Exec 09/02/22
<b>Subtotal - Property</b>	<b>169,080</b>	<b>98,368</b>	<b>52,943</b>	<b>8,646</b>	<b>9,122</b>	<b>0</b>	<b>0</b>		
IT Transformation	5,766	4,772	994	0	0		0	Shukle, Vinit	Approved by Exec 28/11/18
IT digitisation	6,500	0	0	2,000	3,000	1,500	0	Shukle, Vinit	Exec 18/01/23
SharePoint Productivity Platform upgrade/replacement	1,500	1,298	202	0	0		0	Shukle, Vinit	
Customer Services IT System Replacement	761	468	293	0	0		0	Bridgewater, Duncan	
Financial Systems Replacement	1,550	890	660	0	0		0	Mullender, James	Agreed by Council on 24/02/20.
Social Care Case Management System	3,536	3,889	-353	0	0		0	Shukle, Vinit	Exec approved 12 Sept 2018 - £2.7m from Social Care Grant and £0.3m from PCT learning scheme
HR Payroll System Replacement	1,650	1,068	582	0	0		0	Downie, Emma	
Depreciations and charges	0	0	0	0	0	0	0		
Legal Case Management System	355	140	135	40	40		0	Iqbal, Shupriya	
<b>Subtotal - Resources</b>	<b>21,618</b>	<b>12,525</b>	<b>2,513</b>	<b>2,040</b>	<b>3,040</b>	<b>1,500</b>	<b>0</b>		
<b>Total for portfolio</b>	<b>190,698</b>	<b>110,893</b>	<b>55,456</b>	<b>10,686</b>	<b>12,162</b>	<b>1,500</b>	<b>0</b>		

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## EXECUTIVE, RESOURCES &amp; CONTRACTS PORTFOLIO - APPROVED CAPITAL PROGRAMME Q1 2023/24

Scheme	Estimate 2023/24 as at Jan 2023	Actual at Q1 2023/24	Estimate 2023/24 as at Q1	Commentary
	£'000	£'000	£'000	
Emergency Works on Surplus Sites	0	0	47	(Block capital) Essential to maximise capital receipts. To prepare surplus sites for disposal and to cover any emergency works.
Property Investment Fund	0	14	0	Additional £15m capital receipts to fund future acquisition (approved Exec 11/02/15).
Churchill Court	20,970	2,129	33,284	Feasibility study has now been completed and report being prepared for Executive to determine if project proceeds to next stage.
Property Disposal/Feasibility Work-Growth Fund	0	0	26	Feasibilities being carried out on a number of schemes. These are being progressed until planning approval and on-site development by contractor is underway, and the costs will then be transferred to according scheme code.
Property Management System	0	0	57	
Existing consolidated OPR budgets	22,567	0	22,567	
OPR budgets reflected in individual portfolios	0	0	-22,567	
OPR - surface car parks		0	530	
OPR - cemetery properties		0	12	
OPR - Churchill Theatre		0	5,000	
OPR - contingency		0	4,000	
North Block solar PV Installation	0	0	100	New scheme - Exec 30/03/22
Health & Wellbeing Centre	9,943	14	9,887	
<b>Subtotal - Property</b>	<b>53,480</b>	<b>2,157</b>	<b>52,943</b>	



IT Transformation	0	37	994	Approved by Exec 28 Nov 2018. Network hardware including UPS ordered. Total spend for 2020/21 anticipated to be approx £1.3m with remaining £348k to be rephased to 2021/22.
IT digitisation		0	0	Added at Exec 18/01/23
SharePoint Productivity Platform upgrade/replacement	0	6	202	Officers now taking a tactical solution to move to Sharepoint 2010 from 2007 version, before finally moving to new platform of Office 365. Ongoing project which is gaining momentum. This scheme will now be delivered in-line with the IT Transformation scheme to ensure there is no duplication.
Customer Services IT System Replacement	143	23	293	
Financial Systems Replacement	600	8	660	Scheme approved by Executive on 12th February 2020 to procure and implement a new Financial System to replace the existing Oracle E-Business Suite R12, and in-house developed budget monitoring systems (EBM and FBM). The scheme was delayed slightly due to the impact of COVID-19 and essential upgrades required for other financial systems. Following the decision by the Leader in November 2020 to procure the Oracle Cloud ERP (Enterprise Resource Planning) system, officers awarded a contract through the G-Cloud framework in March 2021 to Namos Solutions to implement the system. The main ERP element went live in April 2022, just 3 weeks later than originally planned, and the Enterprise Performance Management (EPM) element which replaces EBM and FBM was completed in August 2022 with the Financials element rolled out to Finance staff in September.
Social Care Case Management System	0	79	-353	Programme budget agreed Sept 2018 (Report ED10868). Award of contract to purchase new system May 2020 (Report CEF20010B).
HR/Payroll System Replacement	0	293	582	The current HR/Payroll software and support contract ends in June 2023.
Dilapidations and charges	0	2	0	Account for servicing of charges related to property dilapidations.
Legal Case Management System	90	18	135	We have entered into contract with Iken for the Case Management System and will also enter into contract with Bundledocs for the bundling software. The contract and associated implementation expenditure will be phased as shown.
<b>Subtotal - Resources</b>	<b>833</b>	<b>466</b>	<b>2,513</b>	
<b>Total for portfolio</b>	<b>54,313</b>	<b>2,623</b>	<b>55,456</b>	

EXECUTIVE, RESOURCES & CONTRACTS PORTFOLIO - PROGRAMME OUTTURN 2022/23				
Scheme	Estimate 2022/23 as at Jan 2023	2022/23 outturn	Variance	Commentary
	£'000	£'000	£'000	
Emergency Works on Surplus Sites	76	29	47	Underspend reprofiled into 2023/24
Property Investment Fund	15,473	-16	15,489	Underspend reprofiled into 2023/24
Churchill Court	15,460	116	15,344	Underspend reprofiled into 2023/24
Property Disposal/Feasibility Work-Growth Fund	45	19	26	Underspend reprofiled into 2023/24
Property Management System	93	36	57	Underspend reprofiled into 2023/24
Existing consolidated OPR budgets	0	0	0	
OPR budgets reflected in individual portfolios	0	0	0	
OPR - surface car parks	0	0	0	
OPR - cemetery properties	0	0	0	
OPR - Churchill Theatre	0	0	0	
OPR - contingency	0	0	0	
North Block solar PV Installation	100	0	100	Underspend reprofiled into 2023/24
Health & Wellbeing Centre	142	198	-56	
<b>Subtotal - Property</b>	<b>31,389</b>	<b>382</b>	<b>31,007</b>	

IT Transformation	1,109	116	993	Underspend reprofiled into 2023/24
IT digitisation	0	0	0	
SharePoint Productivity Platform upgrade/replacement	309	107	202	Underspend reprofiled into 2023/24
Customer Services IT System Replacement	300	150	150	Underspend reprofiled into 2023/24
Financial Systems Replacement	364	304	60	Underspend reprofiled into 2023/24
Social Care Case Management System	424	778	-354	Underspend reprofiled into 2023/24
HR/Payroll System Replacement	1,650	1,068	582	Underspend reprofiled into 2023/24
Dilapidations and charges	0	0	0	
Legal Case Management System	184	140	44	Underspend reprofiled into 2023/24
<b>Subtotal - Resources</b>	<b>4,340</b>	<b>2,663</b>	<b>1,677</b>	
<b>Total for portfolio</b>	<b>35,729</b>	<b>3,045</b>	<b>32,684</b>	

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Report No.  
CSD23114

London Borough of Bromley

PART ONE - PUBLIC

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**Decision Maker:** EXECUTIVE, RESOURCES AND CONTRACTS POLICY  
DEVELOPMENT AND SCRUTINY COMMITTEE

**Date:** Monday 18 September 2023

**Decision Type:** Non-Urgent Non-Executive Non-Key

**Title:** COUNCIL MOTION- -DIGITAL INCLUSION

**Contact Officer:** Philippa Gibbs, Deputy Democratic Services Manager  
Tel: 020 8461 7638 E-mail: Philippa.Gibbs@bromley.gov.uk

**Chief Officer:** Tasnim Shawkat, Director of Corporate Services and Governance

**Ward:** All Wards

---

1. Reason for decision/report and options

At its meeting on 15 May 2023, following a resolution from Full Council, the Committee resolved to “request that Chief Officers review their directorates and take reasonable steps to review digital inclusion within existing policies and report back to the Executive, Resources and Contracts PDS Committee by September 2023 if any deficiencies are identified”. This report sets out the feedback received from the directorates.

---

2. **RECOMMENDATION(S)**

**That the Committee note the information provided by the service departments.**

Impact on Vulnerable Adults and Children

1. Summary of Impact: Not Applicable
- 

Transformation Policy

1. Policy Status: Existing Policy:
  2. Making Bromley Even Better Priority (*delete as appropriate*):
    - (2) For adults and older people to enjoy fulfilled and successful lives in Bromley, ageing well, retaining independence and making choices.
    - (4) For residents to live responsibly and prosper in a safe, clean and green environment great for today and a sustainable future.
    - (5) To manage our resources well, providing value for money, and efficient and effective services for Bromley's residents.
- 

Financial

1. Cost of proposal: No Cost:
  2. Ongoing costs: Not Applicable:
  3. Budget head/performance centre: Not Applicable
  4. Total current budget for this head: Not Applicable
  5. Source of funding: Not Applicable
- 

Personnel

1. Number of staff (*current and additional*): Not Applicable
  2. If from existing staff resources, number of staff hours: Not Applicable
- 

Legal

1. Legal Requirement: Statutory Requirement:
  2. Call-in: Not Applicable:
- 

Procurement

1. Summary of Procurement Implications: Not Applicable
- 

Property

1. Summary of Property Implications: Not Applicable
- 

Carbon Reduction and Social Value

1. Summary of Carbon Reduction/Sustainability Implications: Not Applicable
- 

Impact on the Local Economy

1. Summary of Local Economy Implications: Not Applicable
- 

Impact on Health and Wellbeing

1. Summary of Health and Wellbeing Implications: Not Applicable
- 

Customer Impact

1. Estimated number of users or customers (*current and projected*): Not Applicable
- 

Ward Councillor Views

1. Have Ward Councillors been asked for comments? Not Applicable
2. Summary of Ward Councillors comments: Not Applicable

### **3. COMMENTARY**

3.1 Following the resolution of the Executive, Resources and Contracts PDS Committee on 15 May 2023, Chief Officers were asked to review existing digital inclusion policies within their directorates and report back to the Committee if any deficiencies are identified.

3.2 No deficiencies have been identified and the following feedback has been received from the directorates:

#### **(a) Adult Services**

3.2.1 The Council provides a range of statutory services for adults, and support to people with living healthy lives, to prepare for ageing well and to support people with disabilities.

3.2.2 Whilst we are moving towards more digital options for people, we will not exclusively be forcing people down the digital route. We want to explore new ways of meeting the needs of and offering support to our residents, including those who are currently well, to those who are on the edge of needing social care, to people who draw on care and those who care for others.

3.2.3 During COVID the use of digital tools and technology was essential within Care Homes. Tools such as iPads allow family, friends, and carers of residents to maintain contact during the lockdown and in the event of an outbreak when visiting was suspended. Assessment monitoring was used to support assessment planning and smart technology was crucial in enabling social care and health professionals to complete virtual ward rounds in the view of GPs during and post-COVID.

3.2.4 We have an award-winning Care Home Partnership, whose response is recognised nationally for helping to save lives during the pandemic.

3.2.5 To ensure there is no digital exclusion we will always have a safety net in place for individuals who do not have access to digital tools or technology, have limited digital literacy, have inadequate digital infrastructure, need support because of their protected characteristics or choose not to use smart technology for whatever reason.

3.2.6 The safety net will ensure face-to-face access to support, information and advice is available with the staff member accessing resources online in the presence of the resident, where appropriate. This will ensure we 'Make Every Opportunity Count' (MEOC) – meaning no-one is left behind.

3.2.7 Our relationships and partnerships with Integrated Care Systems (ICS), Care Providers, Voluntary and Community Sector (VCS) and Carers are key to ensuring our residents access the health and social care support and information they need in the right time and place.

3.2.8 We will continue to explore how residents can 'tell their story once' through access to better information, advice and support and coordination of our case management approaches.

3.2.9 The Council has the highest use of the London Care Record across South East London Integrated Care System, which is fundamental in underpinning our approach.

#### **(b) Children, Education and Families**

3.2.10 There is no known impact of digital exclusion on service users.

#### **(c) Corporate Services**

3.2.11 There is no known impact of digital exclusion on service users.

#### **(d) Human Resources and Customer Services**

3.2.12 Customer Services continue to support digital inclusion, by supporting customers via the call centre to either help them navigate on-line services or carry out the transaction for them. The same happens in Reception, with a bank of customer access PCs and tablets where support is available to either help customers self-serve, transfer the skills to be able to self-serve in the future, or process the transaction on their behalf.

#### **(e) Finance**

3.2.13 None of our initiatives have led to digital exclusion of Bromley residents or service users.

3.2.14 Any initiatives are subject to an impact assessment process, which covers data protection and equalities. All digital initiatives encouraging customers to self-serve, including those currently at development stage offer the customers/residents the opportunity to access the service by attending the office or to speak to an advisor on the phone.

3.2.15 Our draft vulnerable customer strategy is attached at Appendix 1. This will steer how we support vulnerable customers and ensure they are able to access all services. This will be updated once the work on voice bots and web bots is completed.

#### **(f) Public Health**

3.2.16 No Public Health services or initiatives have led to digital exclusion of residents or patients.

3.2.17 Our sexual health service has an on-line option, but there is always an option for patients to visit their GP or go to the clinic. Our local sexual health provider sees walk in patients and also support service users to go online in clinic to order test kits. In addition, there are primary care provisions via GPs and community pharmacies.

#### **(g) Environment and Public Protection**

3.2.18 None of the Department's initiatives result in digital exclusion.

3.2.19 With specific reference to parking and the Ringo app, a non-digital option is offered whereby people seeking to park can use their phones in the conventional way and ring the advertised number. They can, if they so wish, do this from their home and pay for a parking session at a particular car park in advance.

#### **(h) Housing Planning and Regeneration**

3.2.20 None of our initiatives have led to digital exclusion. In the case of all policy changes these are accompanied by an EIA. The transformation agenda has also had 2 key streams around digital inclusion and accessibility. Eg: the digital infrastructure strategy, the IT systems for planning and digital access as part of the housing self-delivery schemes.

### **4. LEGAL IMPLICATIONS**

4.1 The Equality Act 2010 protects the rights of individuals and supports equality of opportunity for all. It offers protection in employment, education, the provision of goods and services, housing, transport and the carrying out of public functions. The Act makes it unlawful for organisations carrying out public functions to discriminate against any of the nine protected characteristics



listed in the Act. They must also have regard to the general duties aimed at eliminating discrimination under the Public Sector Equality Duty. The protected characteristics referred to in the Act include age. The Council has a legal duty under sections 20/21 of the Equality Act 2010 to make reasonable adjustments to address or and remove any disadvantage. Hence the Council will consider suitable alternative service delivery options if reasonable and proportionate. For example many Council services can be accessed digitally via Council Libraries and Resource centres across the borough, and staff are available to help residents/customers to use the digital channels.

- 4.2 The Public Sector Equality Duty imposes a requirement to consider equality and good relations in the day-to-day business and decision making of public authorities. It requires equality considerations to be reflected in the design of policies and the delivery of services, including internal policies, and for these issues to be kept under review.

<b>Non-Applicable Headings:</b>	Impact on Vulnerable Adults and Children/Policy/ Finance/Personnel/Carbon Reduction/Procurement/ Property/Local Economy/Health and Wellbeing/ Customers/Ward Councillors
Background Documents: (Access via Contact Officer)	Council Minutes – 12 December 2022 Report to Executive Resources and Contracts PDS Committee – 15 May 2023 Executive Resources and Contracts PDS Committee Minutes – 15 May 2023

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# Customer Services - Vulnerable Strategy

November 2022

DRAFT

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## Version Control Front Sheet

### Confidentiality Statement

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Version	Date	Author	Change details / Reason for change
1.1	14/06/2021	Natalie Harward	Initial Draft
1.2	11/2022	Sarah Lyons	Updated to reflect discussions

### Distribution

Version	Date	Author	Distribution list
1.1	02/08/2021	Natalie Harward	Sarah Lyons / Tony Briggs
1.2	11/2022	Sarah Lyons	Duncan Bridgewater / Claudine Douglas-Brown

### Authorisation

Role	Name	Signature/Reference	Date

## 1 Overview

The purpose of this document is to outline the different vulnerabilities of our residents within the Borough, explain our understanding and describe how we train staff to support our vulnerable customers to access Council services.

Every organisation has a responsibility to ensure appropriate levels of care for their vulnerable customers. This document sets out to prepare each service with the means to recognise vulnerability and provide practical help and resources to make sure every customer maintains access to the vital services they need.

## 2 What is Vulnerability?

Vulnerability can be difficult to define and comes in a range of guises and can often be multi layered. Many people that are vulnerable may not diagnose themselves as 'vulnerable' and vulnerability can affect all kinds of service users. Life is full of many challenges, vulnerability can hit anyone at any point in life and can be on a temporary basis or permanent.

**'able to be easily physically, emotionally, or mentally hurt, influenced, or attacked:'**

*Dictionary.Cambridge.Org*

In terms of customer service; a vulnerable person could be someone who, due to their personal circumstances is especially susceptible to detriment and who by characteristics and/or circumstances, is unable to act or respond appropriately to certain circumstances. This can also be any individual who is, or may be, in need of help or support due to mental health difficulties, disability, age, illness or frailty and who are, or may be, unable to look after their home and/or their wellbeing or unable to protect themselves from harm or exploitation by others.

## 3 Why vulnerability matters

### 3.1 Our Borough

In 2019, there was 318,000 residents in Bromley. From a Mosaic, Grand Index by Experian, we learnt that around 9% of the population are Families with limited resources who budget to make ends meet. 12% of the population are Single people renting low cost homes for the short term or urban residents renting high density housing from social landlords and 4.5% of residents are Elderly people with limited pension income, mostly living alone. Just these 3 Mosaic groups add up to 25.5% of the population categories which may be at risk of some level of vulnerability.

Although there are people that have a higher risk of becoming vulnerable, we understand that most people experience vulnerability at some point in their lives and it can affect anyone at any time. Nobody plans to become vulnerable and few people self-identify as being vulnerable so we need to look out for signs and make sure staff are trained to recognise this and provide support where necessary.

Bromley Council provide key services to its residents such as Benefits, Housing and Social Services. Lack of access to any of these services could cause great hardship and possibly further vulnerability to customers so as an authority, we need to make sure that each department has the required access to what they need from each service line in a way that supports their needs and accessibility.

## 3.2 Equality and Diversity

Liberata Ltd have an Equality and Diversity policy that not only applies to staff but also ensures that everyone accessing our services are treated fairly. We also have a legal duty to follow the Equality Act 2010 and its principles to ensure everybody has an equal opportunity, and is not treated differently or discriminated against because of their characteristics.

It is against the law to discriminate against someone because of:

- age
- disability
- gender reassignment
- marriage and civil partnership
- pregnancy and maternity
- race
- religion or belief
- sex
- sexual orientation

Some of these categories fall into vulnerability categories within the borough such as age and disability. We need to recognise this and make sure Liberata undertakes to provide the required and desirable level of service to all clients, customers and members of the general public in a manner that is non-discriminatory.

## 4 Digital Exclusion

As mentioned in 'Why vulnerability matters' we need to make sure all services are accessible to all vulnerable groups. As an organisation, it is easy to focus on our overall objectives for example 65% of Customers transacting online within the next 2 years or a goal of becoming 'Digital by Default' but, like all new developments, a percentage of the population are at risk of not being able to access these new service channels and alternative measures need to be introduced to protect their access.

However there are some vulnerable and disadvantaged groups who are more at risk of being digitally excluded within the UK and these include:

- those in social housing - 37% of those who are digitally excluded are social housing tenants
- those on lower wages, or unemployed - 17% of people earning less than £20,000 never use the internet, as opposed to 2% of people earning more than £40,000. 44% of people without basic digital skills are on lower wages or are unemployed
- those with disabilities - 33% of people with registered disabilities have never used the internet. This is 54% of the total number of people who have never used the internet
- older people - over 53% of people who lack basic digital skills are aged over 65, and 69% are over 55
- young people - 6% of people who lack digital skills are between 15 and 24 years. Only 27% of young people who are offline are in full-time employment
- There are other groups who have a higher tendency to be digitally excluded such as offenders and ex-offenders. Their risk of reoffending drops significantly when digital skills, training and support is used to complement existing approaches. 21% needed help with maths, reading and writing, 41% with their education, and 40% to help improve their work related skills.

Liberata need to be mindful of the above when new services lines bring in new digital services and processes, although we may promote this as a preferred method for the customer to access our services, we need to confirm it is not limited or become difficult for the digitally vulnerable groups to access the said service.

The London Borough of Bromley already has almost the highest percentage in the UK of users who access the internet daily, with over 92%\* of residents claiming to have used the internet at some point. It also has one of the highest percentages of households with Internet access, with an increasing number of households (95%\*) having some form of broadband coverage.

Increasingly, internet access via a mobile device has also surged in the last few years with a 100%\* increase from 2011 in individuals accessing the internet 'on the go' across all age ranges.

\*ONS 2013

## 5 What are the vulnerability categories in the borough?

There are many reasons someone may be vulnerable and the council recognises it can come in many forms. As explained earlier vulnerability can also be temporary, permanent or come in a series of episodes and anyone at any time could potentially be deemed vulnerable. Many of these vulnerabilities cannot be 'seen' therefore worth noting a vulnerable customer may present and look 'normal'. The characteristics or circumstances that **may** lead to identifying a person as vulnerable within Bromley are as follows:

- **Age** – Young Adult, Children, Old, Care Leavers, Fragile due to age
- **Mental Health** – Depression, Personality Disorders, at risk of suicide
- **Health** – Disability, Terminal Illness, Deaf, Blind, Late term pregnancy, Medicated
- **Learning Difficulties** – Cognitive Impairment, Autism, Asperger's, ADHD, Tourette's, Dyslexia
- **Addiction** – Substance abuse (drugs/Alcohol), Gambling
- **Bereavement** – Recent death of spouse/parent/child/friend
- **Financial Difficulties** – Financial impoverishment, Long-term unemployed, Possession proceedings, at risk of homelessness, Debt Management Agency Involvement
- **Language Barriers/Right to reside** – Language difficulties, No right to reside/Immigration, victim of war, minors dealing with parents matters
- **Digital Exclusion** – Lack of internet access, no internet knowledge or know-how
- **Marital/Home Status** – Marital status change (Divorce etc), Empty nest syndrome, Using male privilege
- **Victim on domestic violence/abuse** – Control, physical abuse, emotional abuse and intimidation. verbal abuse



## 6 How Customers access our services

### Bromley Needs Assessment Framework

Vulnerability	Sub Categories	What services they will contact the council for?	How would they access the service?
Age	Young Age Children Old Age Fragility due to age  At risk of ASB Care Leavers Victim of War	Benefits Revenues Blue Badges Freedom Passes Waste Services Street Services Parks Registrars  Parking Electoral Services Planning Education	<ul style="list-style-type: none"> <li>• Online</li> <li>• Customer Services – Telephone (7.30am-5.30pm R&amp;B / 8.30am-5pm for Corporate Services)</li> <li>• Face-to-face</li> <li>• Local Libraries</li> <li>• Support from Local Charities (ie Age UK)</li> </ul>
Mental Health	Personality Disorders Depression Anxiety Bipolar Social Services Involvement At Risk of Suicide  PTSD Schizophrenia Paranoia	Housing Streetscene Freedom Pass Blue Badges Registrars Revenues Benefits  Education Social Services Noise/ASB Team	<ul style="list-style-type: none"> <li>• On-line</li> <li>• Customer Services – Telephone (7.30am-5.30pm R&amp;B / 8.30am-5pm for Corporate Services)</li> <li>• Face-to-face</li> <li>• Local Libraries</li> <li>• Support from Local Charities (ie Mind)</li> </ul>
Health	Disability Fragility due to age Medicated Terminal Illness Late Term Pregnancy Deaf & Blind	Health & Safety Pest Control Housing Streetscene Blue Badges Freedom Passes  Education Electoral Services Revenues Benefits	<ul style="list-style-type: none"> <li>• On-line</li> <li>• Customer Services – Telephone (7.30am-5.30pm R&amp;B / 8.30am-5pm for Corporate Services)</li> <li>• Face-to-face</li> <li>• Local Libraries</li> <li>• Support from Local Charities (ie Bromley Healthcare, ConnectWell)</li> </ul>
Learning Difficulties	Cognitive Impairment Autism Asperger's Attention deficit-hyperactivity disorder (ADHD)  Tourette's Dyslexia	Housing Waste Services Street Service Freedom Pass Registrars Revenues Benefits  Registrars Social Services Parking Education Noise/ ASB Team	<ul style="list-style-type: none"> <li>• On-line</li> <li>• Customer Services – Telephone (7.30am-5.30pm R&amp;B / 8.30am-5pm for Corporate Services)</li> <li>• Face-to-face</li> <li>• Local Libraries</li> <li>• Support from Local Charities (ie NHS – Learning Disability Team)</li> </ul>
Bereavement	Recent death of spouse/parent/child/friend	Registrars Blue Badges Freedom Passes Revenues Benefits Education Social Services Waste Services	<ul style="list-style-type: none"> <li>• On-line</li> <li>• Customer Services – Telephone Telephone (7.30am-5.30pm R&amp;B / 8.30am-5pm for Corporate Services)</li> <li>• Face-to-face</li> <li>• Local Libraries</li> <li>• Support from Local Charities (ie Bromley Bereavement Services)</li> </ul>
Financial Difficulties	Possession Proceedings Financial Impoverishment Long-term unemployed Debt Management Agency Involvement At risk of Homelessness	Housing Waste Services Parking Revenues Business Rates Benefits Licencing Environmental Health  Street Services	<ul style="list-style-type: none"> <li>• On-line</li> <li>• Customer Services – Telephone (7.30am-5.30pm R&amp;B / 8.30am-5pm for Corporate Services)</li> <li>• Face-to-face</li> <li>• Local Libraries</li> <li>• Support from Local Charities (ie Bromley Citizens Advice Bureau)</li> </ul>
Language barriers/Public Status	Language Difficulties No right to reside / Immigration At Risk of Homelessness Victim of War Minors dealing with parents matters	Food Team Licencing Public Health Housing Waste Services Street Services Environmental Health  Parking Education Registrars Revenues Business Rates Benefits	<ul style="list-style-type: none"> <li>• On-line</li> <li>• Customer Services – Telephone (7.30am-5.30pm R&amp;B / 8.30am-5pm for Corporate Services) - if the resident has support to translate on the call</li> <li>• Face-to-face (if the resident has support to translate)</li> <li>• Local Libraries</li> <li>• Bromley Council can use translation services</li> </ul>
Digitally Excluded	Lack of Internet Access Digital Exclusion	Food Team Licencing Public Health Housing Waste Services Parking Environmental Health  Blue Badges Freedom Passes Registrars Electoral Services Revenues Benefits Noise	<ul style="list-style-type: none"> <li>• Customer Services – Telephone (7.30am-5.30pm R&amp;B / 8.30am-5pm for Corporate Services)</li> <li>• Face-to-face</li> <li>• Local Libraries</li> </ul>
Addiction	Substance Abuse Gambling	Housing Streetscene Freedom Pass Registrars Revenues Benefits	<ul style="list-style-type: none"> <li>• On-line</li> <li>• Customer Services – Telephone (7.30am-5.30pm R&amp;B / 8.30am-5pm for Corporate Services)</li> <li>• Face-to-face</li> <li>• Local Libraries</li> <li>• Support from Local Charities (ie Bromley Drug and Alcohol Service)</li> </ul>
Domestic Abuse	Control Physical Abuse Emotional Abuse and Intimidation Verbal Abuse Isolation	Revenues Benefits Housing Waste Services Street Services Parking Freedom Passes  Registrars Electoral Services Education Social Services Noise / ASB Team	<ul style="list-style-type: none"> <li>• On-line</li> <li>• Customer Services – Telephone (7.30am-5.30pm R&amp;B / 8.30am-5pm for Corporate Services)</li> <li>• Face-to-face</li> <li>• Local Libraries</li> <li>• Support from Local Charities (Bromley &amp; Croyden Womens Aid)</li> </ul>
Marital/Home Status	Recently Divorced Empty Nest Syndrome	Housing Education Registrars Revenues Benefits Social Services Noise / ASB Team	<ul style="list-style-type: none"> <li>• On-line</li> <li>• Customer Services – Telephone (7.30am-5.30pm R&amp;B / 8.30am-5pm for Corporate Services)</li> <li>• Face-to-face</li> <li>• Local Libraries</li> <li>• Support from Local Charities (Bromley &amp; Croyden Womens Aid)</li> </ul>

## 7 Identifying Vulnerable Customers

### 7.1 Age

#### Young People

**Services they might access: Housing, Social Services, Council Tax and Benefits, Education, Planning, Parking Registrars, Elections**

**How they engage with us:** May often want to self-serve and avoid interaction with an agent. Young people's first thought is no longer to pick-up the phone so they may look online first. Services are available online but if it is a more complex query, they may prefer to communicate via email or possibly call the Contact Centre.

**How we assist/what is available:** Forms are available online for all services, if it is a more complex query, Contact Us Forms are available for the customer to complete. Provide telephone assistance for Revenues and Benefits 7.30am – 5.30pm and for any other corporate services 8.30am – 5.00pm Monday to Friday.

**Additional Assistance:**

Bromley Youth Support Programme - 020 8466 3080

Change Grow Live - 020 8289 1999

Leaving Care Team - 020 8313 4108

#### Elderly

**Services they might access: Revenues, Benefits, Blue Badges, Freedom Passes, Street and Waste Services, Greenspaces, Electoral Service, Registrars, Social Services and Planning**

**How they engage with us:** As we know from the 'Digital Exclusion' section above, older people - over 53% of people who lack basic digital skills are aged over 65, and 69% are over 55 and we do have to be mindful of that statistic. Although, it is easy to stereotype an older age customer with the thought of them not being able to transact online but an 82 year old lady might be happy to use online forms & systems elderly residents

**How we assist/what is available:** Customers are able to contact regarding Revenues and Benefits services 7.30am-5.30pm and other Corporate services 8.30am-5pm Monday to Friday. The Civic Centre is also open to the public Monday to Friday 9am – 5pm (Currently appointment only). Elderly customers may also prefer written communication which all services will accept and respond to via letter. The council also have visiting teams for some of their services such as Revenues and Benefits and many of the Adult Social Care Assessments are conducted from home.

**Additional Assistance:**

Bromley & Greenwich Age UK - 020 8315 1850

Bromley Well – 0808 278 7898

## 7.2 Mental Health

Mental health can effect customers in many ways: depression, anxiety, bipolar, post-natal depression, PTSD, schizophrenia, paranoia to name a few. Not every customer suffering with poor mental health has the same wants, needs & solutions.

### Depression/Anxiety

**Services they might access:** Housing, Waste Services, Freedom Passes, Registrars, Revenues and Benefits, Social Services, Parking

**How they would engage with us:** There are many symptoms of depression, including low mood, feelings of hopelessness, low self-esteem, lack of energy and problems with sleep. When customers that may have depression contact, they will want this to be done in their own time and will likely avoid speaking to a person. It is possible they will try and transact online in the first instance.

**How we assist/What is available:** Forms are available online for all services and a good communication method for this customer may be the Bromley Contact Us forms or email. The customer will also appreciate Link Me Up's being sent to them for ease of access.

### **Additional Assistance:**

Bromley Mental Health – Council assisted project for homeless in Bromley and provides all help for mental health issues, need to be referred through a GP.

Bromley, Lewisham & Greenwich Mind - 01689 811222

Talk Together Bromley – 0300 003 3000 / <https://www.talktogetherbromley.co.uk/>

## 7.3 Health

### Deaf & Blind

**Services they might access:** Revenues & Benefits, Waste Services, Blue Badge, Freedom Pass, Education, Electoral Services, Planning and Social Services

**How they would engage with us:** A visually impaired customer may want to transact over the phone or the web with assistive technology. Residents that are hard of hearing may prefer to transact via the web or email.

**How we assist/What is available:** It can be very frustrating for the customer if we are directing to them towards something inappropriate for them – for example directing a blind person online. A blind customer may wish to come to the Civic Centre where assistance dogs are welcome. We can request written letters and emails to be sent in large print and this request can say on their account for future correspondence. If the customer is deaf, all services can be accessed online and another communication method if struggling on the website is the Bromley Contact Us forms. The customer could also write or email in to designate a representative to be able to discuss their account.

## **Additional Assistance:**

Kent Association for the Blind (KAB) - 01622 691357/ [enquiry@kab.org.uk](mailto:enquiry@kab.org.uk)

Royal National Institute for the Blind – 03031239999

Blind Veterans UK – 08003897979

Deaf Umbrella Ltd - 0333 700 7474

Bromley Healthcare – provide a range of high-quality services, clinics and health programmes, from pre-natal care to support for the elderly - 0300 330 5777

## **Physical Disability**

**Services they might access: Revenues & Benefits, Waste Services, Street Services, Greenspaces, Blue Badge, Freedom Pass, Education, Planning, Electoral Services and Social Services, Health & Safety, Pest Control, Housing, Parking**

**How they would engage with us:** Customers preference of engagement method may vary if disabled, many residents will transact online for ease and availability to do this at any time of day. Others may prefer assistance over the phone. The Civic Centre does have disability access.

**How we assist/What is available:** All mentioned services are available online 24 hours a day and if the query is more complex, contact us forms are available. Link Me Up's can also be sent to the customer to take them directly to the web page they need. Telephone assistance is available for Revenues and Benefits services 7.30am-5.30pm and other Corporate services 8.30am-5pm Monday to Friday. The Civic Centre also has disability access and is also open to the public Monday to Friday 9am – 5pm (Currently appointment only).

## **Additional Assistance:**

Bromley MenCap – 0208 466 0790

Bromley Citizens Advice Bureau (CAB) - 0808 2787 898

<https://www.gov.uk/financial-help-disabled>

## **Terminal Illness**

**Services they might access: Revenues & Benefits, Housing, Waste Services, Blue Badge, Freedom Pass, Registrars, Education and Social Services**

**How they would engage with us:** A customer with a terminal illness may want to transact in their own time with the help if required, possibly online to avoid speaking to a person if they are very ill. Although they may have complex needs or circumstances which they would like to discuss with a person.

**How we assist/What is available:** Online forms and Contact Us forms would be a good way of communication and Link Me Up's can be sent to direct customers online easier.

Customers are able to contact via phone regarding Revenues and Benefits services 7.30am-5.30pm and other Corporate services 8.30am-5pm Monday to Friday.

Registrars deal with those with a terminal illness Registrars General License Marriage (death bed marriage) and waivers to speed up the process for those terminally ill.

## **Additional Assistance:**

Bromley Healthcare – provide a range of high-quality services, clinics and health programmes, from pre-natal care to support for the elderly - 0300 330 5777  
Marie Curie – 0800 090 2309

## 7.4 Learning Difficulties

### **Cognitive Impairment / Dementia**

Cognitive Impairment usually refers to problems effecting memory loss but could involve a change in problem solving, concentration or attention. A person with cognitive impairment is more likely to develop Dementia.

**Services they might access: Housing, Waste Services, Blue Badges, Freedom Passes, Registrars, Revenues and Benefits, Social Services**

**How they engage with us:** A customer with cognitive impairment has trouble remembering, learning new things, concentrating, or making decisions that affect their everyday life. Due to this they will need support with the decisions they make. Therefore they will likely access our services via the phone or face-to-face at the Civic Centre. They will often have a relative, friend or representative call on their behalf or prefer to write things down so may communicate via letter.

**How we assist/what is available:** We can communicate with customers via letter so they then have this to remind them of situations and processes. If the customer has designated and declared a representative, we will contact them to avoid confusion for the resident. Also, they can call the contact centre or visit the Civic centre.

**Additional Assistance:**

**Alzheimer's Society Bromley** – 02084609245 – offers support, advice, financial advice

### **Autism Spectrum Disorder (ASD)**

Autism is a development disability caused by differences in the brain and the abilities of people with Autism can vary significantly. For example, some people with ASD may have advanced conversation skills whereas others may be nonverbal. Some people with ASD need a lot of help in their daily lives; others can work and live with little to no support. Customers with Autism may find it hard to communicate and interact with other people and in turn find it hard to understand how other people think or feel. It is possible they'll take longer to understand information or do/think the same thing over and over. They may get anxious or upset about unfamiliar situations, loud noises and music. We need to understand that being autistic does not mean you have a disease or illness that needs treating. It means your brain works in a different way to others.

**Services they might access: Revenues & Benefits, Housing, Waste Services, Blue Badge, Greenspaces, Freedom Pass, Education, Planning, Parking and Social Services**

**How they would engage with us:** A customer with Autism may avoid face-to-face situations and will likely try to transact themselves online. If not they may call the Contact Centre.

**How we assist/What is available:** Online forms and Contact Us forms would be a good way of communication and Link Me Up's can be sent to direct customers online easier. Customers are able to contact via phone regarding Revenues and Benefits services 7.30am-5.30pm and other Corporate services 8.30am-5pm Monday to Friday.

## **Additional Assistance:**

Bromley Mencap – 0208 466 0790

## **Dyslexia**

Dyslexia causes problems with certain abilities used for learning, such as reading or writing.

**Services they might access: Housing, Waste Services, Freedom Passes, Registrars, Revenues and Benefits, Social Services, Parking**

**How they engage with us:** – A customer with learning difficulties may find it hard to transact online and complete forms if they struggle to read and write

**How we assist/what is available:** The customer may need the support from an advisor to take the information for them. We need to support these customers in this process therefore they can call the Contact Centre or come into the office at the times stated above. Social Services also complete a lot of their assessments face-to-face.

## **Additional Assistance:**

Adult Early Intervention Service (Bromley Borough Council) - 020 8461 7777

Bromley Well – advice and guidance for carers as well as intensive support for crisis & emergency, they provide home visits and support groups to attend

## **7.5 Addiction**

**Addiction** is a term that means compulsive physiological need for and use of a habit-forming substance. The addiction could be drugs, alcohol or gambling related and this vulnerability can intertwine with others such as mental health issues. It is likely the customer won't let u know they are dealing with addiction so we need to make sure we are treating every customer fairly to make sure they all have access to all services required.

**Services they might access: Revenues & Benefits, Housing, Waste Services, Registrars, Education and Social Services**

**How they would engage with us:** Customers suffering with addiction may avoid contacting us, or leave going so to a time when things become more difficult for them such as further recovery action on Council Tax. The resident may try contacting via email or online to explain their circumstances or contact via phone if they are uncertain of what to do to resolve their query. It might be that they do not have access to the internet or a phone, in these circumstances, face-to-face interaction may be their only option.

**How we assist/What is available:** Webforms and Contact Us Forms for the customers that would prefer to transact online, some departments also have email address that can be used. Customers are able to contact via phone regarding Revenues and Benefits services 7.30am-5.30pm and other Corporate services 8.30am-5pm Monday to Friday. The Civic Centre is also open to the public Monday to Friday 9am – 5pm (Currently appointment only) and there are phones available to each department.

## **Additional Assistance:**

Bromley Drug & Alcohol Service (BDAS) – for addiction help. - 020 8289 1999

GamCare (Gambling Support) - 020 7801 7008

## **7.6 Bereavement**

Bereavement is the period of grief and mourning we go through adjusting to the loss of someone close to us. The death of a loved one is probably the single most difficult challenge we will face in our life time.

Grief can sometimes leave people feeling overwhelmed and it affects people in all sorts of ways. If you experience the death of someone who is very important to you, it can be difficult adjusting to the immense changes happening in your life. Losing a loved one presents many challenges and in addition to dealing with the emotional pain, you may also be worrying about the practical issues that can follow bereavement.

**Services they might access: Revenues & Benefits, Housing, Registrars, Blue Badge, Freedom Pass, Education and Social Services**

**How they would engage with us:** Residents may look for the easiest way to inform the council of a death so they do not need to contact multiple departments. It is possible they may want to speak to a person over the phone or face-to-face rather than online due to the sensitive subject matter of informing of a death. Bereavement can often link to other vulnerabilities such as depression, if that is the case the customer may want this to be done in their own time and will likely avoid speaking to a person. It is possible they will try and transact online in the first instance.

**How we assist/What is available:** Tell Us Once Service - Tell Us Once is voluntary to use and very helpful. It enables you to report a death only once, telling central and local government services securely and confidentially without you having to inform them individually. This includes council services such as council housing, housing benefit, council tax, Blue Badge and remove the person from the electoral register, HMRC, DWP, DVLA and Pensions Services.

Customers are able to contact via phone regarding Revenues and Benefits services 7.30am-5.30pm and other Corporate services 8.30am-5pm Monday to Friday. The Civic Centre is also open to the public Monday to Friday 9am – 5pm (Currently appointment only) Also, Web forms and Contact Us forms for the customers that would prefer to transact online, some departments also have email address that can be used

**Additional Assistance:**

Bromley Bereavement Services – 0208 768 4595  
Cruse Bereavement Care – 0808 808 1677

## 7.7 Financial Difficulties

Many people experience problems with their finances at some stage of their lives. And they may experience such problems because they've had an unexpected change in their personal or financial circumstances. For example, they may have lost their job or suffered an illness that has stopped them from working for an extended period. This change in circumstances can mean that they have to manage with a reduced income. And this in turn can lead to them experiencing difficulty meeting their existing financial commitments, such as repayments to outstanding credit.

**Services they might access: Revenues & Benefits, Business Rates, Housing, Waste Services, Education and Social Services, Parking, Registrars**

**How they would engage with us:** Residents may first see if their query can be dealt with online to avoid speaking to a person. If not, they will call to resolve the issue.

**How we assist/what is available:** Online platforms for Revenues and Benefits. Link Me Up's available for Customer Service staff to send to customers to make it easier to find what they need online. Bromley Welfare Fund - Council based fund to help Bromley residents on low incomes, it can provide temporary accommodation, help to buy beds, cookers, fridges and freezers. Customers are able to contact via phone regarding Revenues and Benefits services 7.30am-5.30pm and other Corporate services 8.30am-5pm Monday to Friday.

## **Additional Assistance:**

Bromley Welfare Fund  
Breathing Space -  
Citizens Advice Bureau (CAB) - [0808 278 7898](tel:08082787898)  
Christians Against Poverty (CAP) - [07754 934722](tel:07754934722)  
Job Centre Plus – [0800 169 0190](tel:08001690190)  
[Gov.uk](http://Gov.uk)

## **7.8 Language Barriers/Public Status**

Experiencing language barriers can easily cause frustration on both the advisors and customer's side, while preventing advisors from providing accurate and efficient customer service to your clients. Also, not every customer has the right to claim benefits or have access to any public funds, this applies to a person who is 'subject to immigration control' in the UK. If a customer doesn't have the right to reside this can be an upsetting process for them, we can direct customers to the support available.

**Services they might access: Revenues & Benefits, Housing, Waste Services, Street Services, Blue Badge, Freedom Pass, Education, Elections, Planning, Parking and Social Services**

**How they would engage with us:** Customers with language barriers may try transacting online first with support from family or friends. They then may contact via phone or face-to-face and may bring a third party to support and translate (friend or family member) They may also get the third party to write a letter or email.

**How we assist/What is available:** All services are accessible online 24 hours a day and the text from the website can be translated using the 'Select Language' drop down box at the bottom of each page. Link Me Up's can also be sent to make it easier to direct the customer to find what they need. Customers are able to contact via phone regarding Revenues and Benefits services 7.30am-5.30pm and other Corporate services 8.30am-5pm Monday to Friday. The Civic Centre is also open to the public Monday to Friday 9am – 5pm (Currently appointment only). Agents will go through data protection checks with the caller to be able to discuss with a third party. The local authority has the power to provide emergency housing and/or financial support to a family when a child's welfare is at risk whilst assessments or enquiries are being carried out. Departments are responsible for finding out if a customer needs communication support and must offer appropriate translation and interpretation services; they may use a mix of bilingual staff, community organisations and professional interpreters and translators. A list of foreign language speakers is available on the LBB intranet.

## **Additional Assistance:**

Refugee Council - [0808 196 7272](tel:08081967272)  
Migrant Help - [0808 8010 503](tel:08088010503)

## **7.9 Digital Exclusion**

Despite the transformative impact of technology on society many people remain digitally excluded. Those who are excluded digitally are also far more likely to be disadvantaged according to many other social and economic measures. The digital divide exacerbates inequality. Digitally-excluded people can lack skills, confidence and motivation, along with having limited or no access to equipment and connectivity.



**Services they might access: Revenues & Benefits, Waste Services, Street Services, Greenspaces, Blue Badge, Freedom Pass, Education, Social Services, Planning, Parking Registrars and Elections.**

**How they would engage with us:** Online is not possible for digitally excluded customers. They will engage with us via phone or face-to-face. They may get support online from friends or family.

**How we assist/What is available:** Customers are able to contact via phone regarding Revenues and Benefits services 7.30am-5.30pm and other Corporate services 8.30am-5pm Monday to Friday. The Civic Centre is also open to the public Monday to Friday 9am – 5pm (Currently appointment only). There is also Bromley out of hours service for emergencies that need reporting at the time when the lines are closed. Residents can also access the internet at Bromley's libraries and often then provide digital sessions and support.

**Additional Assistance:**

Age UK (Currently offering Digital Support Sessions) – [info@ageukbandg.org.uk/020 8315 1850](mailto:info@ageukbandg.org.uk/020_8315_1850)

Bromley Libraries - <https://www.bromley.gov.uk/libraries>

Cotmandene Community Resource Centre - [Cotmandene Community Resource Centre | Cotmandene Community Resource Centre | London Borough of Bromley](#)

Mottingham Community and Learning Shop - [Mottingham Community and Learning Shop | Mottingham Community and Learning Shop | London Borough of Bromley](#)

## 7.10 Domestic Violence/Abuse

Domestic Abuse can take many forms, from physical abuse, control, emotional or verbal abuse and financial abuse along with more. Any incident or pattern of these behaviours are defined as domestic abuse. Domestic abuse is perhaps most commonly thought of as violence between partners, but it can take many other forms and be perpetrated by a range of people. Domestic Abuse can also lead to other vulnerabilities such as depression, anxiety, long-term health conditions and financial vulnerabilities.

**Services they might access: Revenues & Benefits, Housing, Waste Services, Street Services, Parking, Education, Registrars, Elections and Social Services, Noise/ASB Team**

**How they would engage with us:** Residents experiencing domestic violence may engage with us online to avoid communicating with a person due to their feelings of isolation or possible poor mental health, they will unlikely come into the office face-to-face unless they are wanting support. We need to make sure we notice this when it happens and pick up on signs of this from customers (looked at in training) If the customer is struggling online, they may call the Contact Centre.

**How we assist/What is available:** All services are accessible online 24 hours a day. Customers are able to contact via phone regarding Revenues and Benefits services 7.30am-5.30pm and other Corporate services 8.30am-5pm Monday to Friday. Although this is the case, we want residents talk to get the help they need, therefore if we notice potential domestic abuse or a customer discloses this, we need to follow the safeguarding policy.

**Additional Assistance:**

Bromley & Croydon Women's Aid – 0208 313 9303

## 7.11 Marital/Home Status

A household change can really effect a person, is the customer going through a divorce? Are they recently married/cohabiting and struggling to adjust?

**Services they might access: Revenues & Benefits, Housing, Waste Services, Education, Registrars, Elections and Social Services, Noise/ASB Team**

**How they would engage with us:** A resident struggling with a marital or home change could engage with us via either of our methods, possibly more likely via phone as they might not be sure what to do or want to ask questions and prefer to speak to a person.

**How we assist/What is available:** All services are accessible online 24 hours a day and Link Me Up's can also be sent to make it easier to direct the customer to find what they need. Customers are able to contact via phone regarding Revenues and Benefits services 7.30am-5.30pm and other Corporate services 8.30am-5pm Monday to Friday.

### **Additional Assistance:**

Novo Mediation (mediation divorce services) – 0800 612 4426 / [info@novomediation.co.uk](mailto:info@novomediation.co.uk)

## 8 Identifying Vulnerable Customers

We need to make sure that all staff, whether face-to-face, over the phone or email can recognise all types of vulnerabilities and quickly pick up any signs of vulnerability to be able to deal with the enquiry in the appropriate way. It may be easy to stereotype customers, especially

As a simple best practice, for identifying vulnerable customers, a call agent should first proceed with CARE – picking up four signs under this acronym to assess customer vulnerability.

- **Comprehend** – Is the customer following and understanding the discussion taking place?
- **Assess** – Is the customer able to work out what they are being told?
- **Retain** – Is the customer able to retain and remember the information you give them? Re you often needing to repeat things or explain in a different way?
- **Evaluate** – Is the customer able to properly express, explain or communicate their decisions? Are they genuinely contributing to the discussion or merely agreeing with what you are saying.

### 8.1 System Flag

Across each of Bromley Council's departments, different systems are used to access customer data and log reports. Some of these systems allow us to put a flag on the account of a vulnerable customer, so we can give vulnerable customers the best possible support when they need it. . Once set up, the flag will stay on the account and there is no need for the customer to tell us every time they call in. Accounts with the flag can also have an important notepad entry, to explain the kind of support the customer needs.

#### **Academy**

Academy is used for Revenues, Benefits and Business Rates. A flag can be added thorough the creating of a notepad to the Revenues and Business Rates system by going to the notepad. This then puts the alert below on the customer account, this can be seen at the top of the screen every time the account is open. We can highlight the type of vulnerability as an important notepad alongside the flag.

## 9 Training and handling of vulnerable customers

Liberata understands that for our vulnerable customers to get the best service where they feel supported, training of our staff is key to provide them with the required understanding and tools to do this.

### 9.1 Walks of Life

As part of Liberata's Customer Service Training, all employees take part in a session called 'Walks of Life'. In this training session, staff learn the different types of vulnerabilities, advice on how to recognise it and the best way to support vulnerable customers. Along with supporting agencies and charities to direct the customer to if required.

Advisors also go through the '3 R's'. By approaching each interaction with the customer this way, we are providing structure to the call to make it easy for the vulnerable customer to follow and creates purpose to what you are saying:

- Try and **relate** to the customer – this should help you empathise with the customer's situation and be more understanding throughout the call.
- Try and **reassure** the customer – we are there to help & you must reassure you will do that, if you genuinely want to help the customer this will come across & the customer normally will become reasonable once they understand you do care
- Try and **resolve** the query – the customer may feel like you haven't resolved the query due to procedures however the resolution may be; talking to someone, gaining advice on next steps & procedure, booking an appointment, directing to organisations with expertise in an area where they are struggling.

### 9.2 Handling a difficult caller

With the kinds of services we deliver, sometimes we have to be prepared to deal with challenging customers, specifically those that are unhappy who could then become irate.

Whether over the phone or face to face, aggression from customers can be scary, we cover this in training to provide advisors with the skills needed to achieve a successful resolution.

Anger is a protective emotion, often activated by a dual perception of vulnerability and threat. The more vulnerable we feel, the more threat we perceive.

In training we look at different theories such as the PAC Ego - The Parent, Adult, Child Ego explores how our attitude & behaviours effect the customers and how these different states can get different reactions.

Conflicted management is also looked at with 'Handling Difficult Callers', from the meaning of conflict, different conflict management styles and a quiz to find out your own conflict management style. This helps advisors understand their own personalities and conflict management styles and in turn, understanding different customers.

### 9.3 6 Step Plan

It is possible, due to the nature of the calls we handle that vulnerable customers might say they intend to harm themselves or family members that are in the household with them. It is important that systems,

procedures and responses are in place and that members of staff know what to do if a customer says they intend to harm themselves. Liberata's 6 Step Plan is as follows;

1. Take the statement seriously – remain calm, listen & ask gentle questions. Give the customer your full attention & let them know you are there to help.
2. Seek help – do not put the caller on hold but alert a supervisor/manager (they will listen in)
3. Gather Information – talk to them, assess the risk. Are they at home, are they with anyone? We need as much information as possible to pass to the emergency services.
4. Provide referral advise – this could be GP, Mind, family, CAB (depending on the issue will depend where you refer the customer to)
5. Seek emergency help – the manager/supervisor listening in will call the emergency services. We do not need the customers consent to contact the emergency services.
6. Review – after the incident you may want to take time with your manager to discuss the call or contact our EAP.

As well as the above, we provide staff with call listening to live calls and mentors for support when agents start dealing with customers either on the phone or face-to-face.

## 10 GDPR/Data Protection Constraints and regulations (how we manage)

### 10.1 What is GDPR

The General Data Protection Regulations (GDPR) is the data protection law that was put into effect on the 25<sup>th</sup> May 2018 and applies to most UK businesses and organisations. It governs the processing of personal data and is used alongside the data protection act 2018.

It is imperative we comply with GPDR to avoid penalties and reputational damage and we need to know who we are sharing residents data with and why. A personal data breach means a breach of security leading to the accidental or unlawful destruction, loss, alteration, unauthorised disclosure of, or access to, personal data transmitted, stored or otherwise processed. So this means more than just loss of data, it also includes data being accessed inappropriately or by someone unauthorised to have such access to that data. If we breach GDPR, we must notify the ICO.

### 10.2 Constraints of GDPR for vulnerable customers.

Protecting vulnerable consumers and treating them fairly is a key focus for us. When speaking to a resident about some of our services, we must ascertain that we are speaking to the account holder of the account the caller is wanting to discuss for their own security. We need to confirm their name and address and ask 2 additional security questions before discussing and disclosing anything on the account. Advisors have a desk aid to follow with the questions they can ask the customer.

On occasion, vulnerable customers can find it difficult to answer these questions, whether it be due to memory loss, learning difficulties, previously accounts being dealt with by spouses or many other reasons. GDPR is a regulation we have to follow and these questions do need confirming and we cannot avoid asking them in this circumstance. The advisors are trained to be mindful of this and understand they may need to give the customer more time. They may also ask the customer questions such as; Do they need to go and check something to get the answer? Would it be better if we call them back at a later time? Is there someone else available that can support them?

Vulnerable customers often have relatives, friends or representatives interact with Bromley Council on their behalf. We cannot speak to a 3<sup>rd</sup> party without clear verbal or written consent from the party concerned, even if the person confirmed data protection questions. If we receive verbal consent, it is only

valid for that call or visit. If we receive written consent, it will remain on the account until the account older advises otherwise.

## 10.3 Ensuring Compliance with GDPR and Managing Vulnerable Customers

To ensure our staff are complying with GDPR procedures, they firstly go through Data Protection and GDPR training so they understand what it is, why it is necessary, what happens if we do not comply and how it effects their role so they know what is needed.

Secondly, each agent have the required amount of their calls listened to by a Supervisor or Team Leader to make sure that our GDPR policy is being adhered t and they're asking the required questions of the customer. If they do not follow the required procedure, the agent fails the call and will go through additional training, if this is repeated a formal plan is required.

Although we need to follow this procedure, we understand that some vulnerable customers may not be able to answer some of the required questions, whether this be due to cognitive reasons or language barriers for example. In this circumstance, we may ask if the customer has anyone to support them that they would be happy with us speaking with.

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