



EXECUTIVE

YOU ARE REQUESTED TO ATTEND A MEETING OF THE EXECUTIVE TO BE HELD IN THE PRINCIPAL COMMITTEE ROOM, THE DEANE HOUSE, BELVEDERE ROAD, TAUNTON ON WEDNESDAY 9TH MARCH 2005 AT 18:15.

AGENDA

1. Apologies
2. Public Question Time
3. Minutes
4. Review of Public Conveniences
Report of Waste Services Manager (enclosed)
5. Treasury Management and Investments Strategy 2005/06
Report of Financial Services Manager (enclosed)
6. Internal Audit Partnership
Report of Head of Resources (enclosed)
7. ODPM Consultation Paper on 3 year Revenue and Capital Settlements
Report of Head of Resources (enclosed)
8. The Local Development Framework - The Local Development Scheme
Report of Forward Plan Manager (enclosed)
9. Taunton Sub Area Strategy - Verbal update - Confirmation of response to SCC

G P DYKE
Member Services Manager

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Somerset

TA1 1HE

01 March 2005



Members of the public are welcome to attend the meeting and listen to the discussion. Lift access to the main committee room on the first floor of the building is available from the main ground floor entrance. Toilet facilities, with wheelchair access, are also available. There is a time set aside at the beginning of the meeting to allow the public to ask questions



An induction loop operates to enhance sound for anyone wearing a hearing aid or using a transmitter. If you require any further information, please contact Greg Dyke on:

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Executive – 9 February 2005

Present: Councillor Mrs Lewin-Harris (Vice Chairman in the Chair)
Councillors Bishop, Mrs Bradley, Cavill, Garner, Hall and Leighton

Officers: Mrs P James (Chief Executive), Ms S Adam (Head of Resources), Mr P Carter (Financial Services Manager), Mr C Brazier (Head of Housing) and Mr G P Dyke (Member Services Manager)

Also Present: Councillors Bowrah, Henley, House, Paul, Wedderkopp, Mrs Whitmarsh

(The meeting commenced at 6.15 pm.)

10. Apologies

Councillors Williams (Chairman) and Edwards.

11. Minutes

The minutes of the meeting of the Executive held on 12 January 2005 were taken as read and were signed.

12. Public Question Time

- (a) Glenys Gill, Artistic Director, The Brewhouse Theatre addressed the Executive and emphasised the valuable contribution made to the community by the Brewhouse Theatre. It provided an opportunity to take part in many activities and she emphasised the importance of its work to both people and art. She drew attention to the impact that any reduction in funding would have on the Brewhouse and asked that the Council consider very carefully any proposed funding reductions.

Councillor Mrs Bradley thanked Glenys Gill for her full resume of the work of the Brewhouse Theatre and assured her that the Council were well aware of the contribution made to the community by the Theatre. However, the Council had a responsibility to manage its overall budget and had therefore looked at everything that the Council was doing. It was in this context that a reduction in the funding of the Brewhouse was proposed.

Councillor Mrs Lewin-Harris replied that funding of the Brewhouse although reduced, would continue and that the Council were committed to and supportive of the work that the Theatre did.

- (b) Councillor Henley as a member of the public asked the following questions.
- (i) A Council tenant in Wellington who had been convicted of dealing in drugs and served a prison sentence was to be allowed to return to his Council dwelling. This appeared to have been dealt with differently to that of a Taunton Council tenant who had similarly been convicted of a drugs offence and was being evicted from his Council property.

Councillor Garner explained that the difference in these two cases was that drugs had been found on the Council premises in the

property at Taunton and not within the property at Wellington. The case in Wellington was not within the confines of Council property and therefore was remote from its jurisdiction. Councillor Garner assured Councillor Henley that the Council would continue to act robustly in cases where drugs were found on Council property.

- (ii) Attention was drawn to the increasing problem that was being experienced in the High Street, Taunton where birds were creating a nuisance for both shoppers and shop workers. This problem had been exacerbated by the continued insistence of a particular individual to feed the birds on a regular basis. Councillor Henley asked if there was anything the Council could do to reduce the problem by perhaps erecting signs and carrying out regular cleaning of this area of High Street.

Councillor Mrs Lewin-Harris undertook to pass this question on to Councillor Edwards, the Portfolio Holder with responsibility for Environmental Services.

- (iii) Attention was drawn to the Little Big Screen project where cinema releases were sent out to village halls and rural areas. A proposed cut in the budget would mean that this project would cease and Councillor Mrs Bradley was asked if anything could be done to retain it.

Councillor Mrs Bradley replied that in view of the Councils budget problems it had been necessary to look at core funding to those organisations and activities that contributed to community life. Funding for special projects such as this could be obtained from other sources.

12. General Fund Revenue Estimates 2005/2006

Considered report previously circulated regarding the Executive 2005/2006 budget proposals prior to submission to Council on 22 February 2005 for approval. The report contained details on:

- 1) the General Fund Revenue Budget proposals for 2005/2006 including the proposed Council Tax increase and the Prudential Indicators and
- 2) draft figures on the predicted financial position of the Council for the following two years.

The report had been considered in detail by the Review Board and details of its views were submitted. The Executive's response to the issues raised at that meeting were submitted. The Executive had agreed to reinstate two budget changes namely the subsidies for Pest Control and the introduction of 10 new dog waste bins. The total cost of these additions was £6,420. The Revenue Contribution to Capital (RCCO) would be reduced to finance these items. The final RCCO would now total £294,750.

As a result the proposed total Council Tax increase was 4.5%.

Members were encouraged to consider the Medium Term position when making budget decisions and it was now a requirement for the Council to prepare not only budgets for the following financial year but also to provide indicative figures for the two years after that. The Medium Term Financial Plan (MTFP) provided an indication of the expected budget gap going forward into 2006/2007. It was noted that it was

likely that the Council would have to further review services and continue the good work set out in this year's budget strategy and the profile of services.

The 2003/2004 Statement of Accounts had been formally signed off by the Council's Auditors and had received an unqualified audit opinion. A summary of the predicted General Fund Reserve position prior to the budget setting decision was submitted.

The Council Tax calculation and formal tax setting resolution was to be considered separately. The proposed budget for Taunton Deane would result in a Band D Council Tax of £121.88 an increase of £5.25 (4.5%) on 2004/2005. This represented an increase of 10 pence per week. The Band D taxpayer would receive all the services provided by the Council in 2005/2006 at a cost of £2.34 per week.

The estimated expenses chargeable to the non-parished area of Taunton in 2005/2006 amounted to £26,520 an increase of 3% and this formed part of the total net expenditure of the Council. The precept in 2004/2005 was £25,750.

As part of the Prudential Code for Capital Finance there was a requirement for Council to approve the indicators set out in the report. These included the borrowing limits which were previously detailed in a separate report to the Executive.

The Local Government Act 2003 imposed a duty on the Councils Section 151 Officer to comment as part of the budget setting process upon the robustness of the budget and the adequacy of reserves. The Head of Resources had thoroughly reviewed the procedures outputs and outcomes of the budget setting process and felt that the Councils reserves were adequate and the budget estimates used in preparing the 2005/2006 budget sufficiently robust.

RESOLVED that the Council be recommended that the budget for general fund services for 2005/2006 as outlined in the report be agreed and that

- (a) the transfer for any under spend in 2004/2005 back to General Fund Reserves be agreed
- (b) the proposed 2005/2006 budget, being Authority expenditure of £11,504,690 and Special Expenses of £26,520 be agreed in accordance with the Local Government Act 1992
- (c) the predicted General Fund Reserve balance at 31 March 2006 of £1,304,309 be noted
- (d) the Prudential indicators for 2005/2006 as set out in the report be agreed.

13. Capital Programme 2005/2006 – 2007/2008

Submitted report which detailed the proposed General Fund (GF) and Housing Revenue account (HRA) capital programmes for the period 2004/2005 to 2007/2008.

For the General Fund the estimated resources available for this period amounted to £15,211k. The proposed capital programme amounted to £14,774k leaving £437k of unallocated capital resources available for future schemes.

For the Housing Revenue Account the estimated resources available for 2005/2006 amounted to £5,485k. The proposed capital programme for 2005/2006 amounted to £4,760k leaving £725k of unallocated capital resources available for additional schemes.

Details were submitted of the schemes that were currently in the capital programme and those which the Executive proposed to make a priority for the new programme.

RESOLVED that

- (a) Council be recommended that a suggested investment plan for the additional £350,000 HRA RCCO as outlined in Appendix D of the report be agreed and
- (b) Council be recommended that both the General Fund and Housing Revenue Account Capital Programme be agreed.

14. Housing Revenue Account, Revenue estimates and rent levels, Deane Helpline and Deane Building DLO account 2005/2006

Submitted report previously circulated which outlined the proposed Housing Revenue Account for 2005/2006. It also included details relating to the new rent level, service charges and other housing related charges such as garage rents. Finally it provided information on the Deane Helpline Trading account and Deane Building DLO Trading account.

Both the Housing Review Panel and the Review Board had considered the 2005/2006 budget report and had made no amendments or suggestions for changes to the proposed budget.

RESOLVED that Council be recommended that the Housing Revenue Account budget for 2005/2006 be agreed.

15. Council Tax Setting 2005/2006

Submitted report which made recommendations to the Council on the proposed level of Council tax for 2005/2006.

The Council was required to make an annual determination which set its gross expenditure (including the Housing Revenue Account and balances brought forward) and gross income (also including the Housing Revenue Account and balances brought forward) with the difference as its budget requirement. (This determination is set out in the resolution). The estimated expenses chargeable to the non-parished area of Taunton in 2005/2006 amounted to £26,520 and this formed part of the total net expenditure of the Council. Details were also submitted at the parish precepts levied and the appropriate Council Tax at Band D.

The estimated balance on the Council Tax Collection Fund was a deficit of £197,062. Taunton Deane's share of this amounted to £21,312. This was reflected in the revenue estimates.

The overall debt outstanding on Community Charge had now been written off, as a consequence the Community Charge Collection Fund as at 15 January 2005 had a nil balance. There was therefore no impact on the revenue estimates.

The Council's budget requirement including parish precepts and non-parish special expenses was £11,847,762. This was then reduced by the amount notified in respect of the Borough Council's Revenue Support Grant of £3,739,152 and the Non-Domestic Rates Distribution from the pool which amounted £3,32,288.

The net amount, having taken the Collection Fund position into account of £5,97,634 was used to calculate the Council Tax at Band D reflecting the Parish Precepts by dividing it by the total of the Council Tax Base as approved by the Executive in December 2004.

The Council Tax for the Borough (excluding Parish Precepts and Special Expenses for the non-parished area) was £121.88 an increase of £5.25 (4.5%) compared to the 2004/2005 Council Tax. The total Council Tax including the County Council and Police Authority precepts was still subject to confirmation.

RESOLVED that the Council be recommended that subject to final determination including the Council Tax for Somerset County Council and the Police Authority which was still to be advised:-

1. That it be noted that at its meeting on 8 December 2004 the Executive calculated the following amounts for the year 2005/2006 in accordance with the regulations made under Section 33(5) of the Local Government Finance Act 1992 (as amended):-

- (a) 39,010.22 being the amount calculated by the Council, in accordance with regulation 3 of the Local Authorities (Calculation of Council Tax Base) Regulations 1992, as its Council Tax base for the year.

(b)

Ash Priors	65.53	Neroche	238.16
Ashbrittle	89.95	North Curry	693.17
Bathealton	80.69	Norton Fitzwarren	722.27
Bishops Hull	1,068.26	Nynehead	149.33
Bishops Lydeard / Cothelstone	1,892.53	Oake	322.79
Bradford on Tone	277.41	Otterford	163.37
Burrowbridge	200.90	Pitminster	436.97
Cheddon Fitzpaine	629.82	Ruishton / Thornfalcon	611.24
Chipstable	115.32	Sampford Arundel	128.32
Churchstanton	310.49	Staplegrove	711.03
Combe Florey	111.69	Stawley	133.37
Comeytrowe	2,058.96	Stoke St Gregory	372.42
Corfe	130.01	Stoke St Mary	197.37
Creech St Michael	922.30	Taunton	15,563.51
Durston	56.60	Trull	982.09
Fitzhead	120.37	Wellington	4,536.05
Halse	143.65	Wellington (Without)	287.37
Hatch Beauchamp	243.63	West Bagborough	152.37
Kingston St Mary	434.64	West Buckland	403.34
Langford Budville	213.60	West Hatch	137.62
Lydeard St Lawrence / Tolland	193.83	West Monkton	1,070.90
Milverton	574.78	Wiveliscombe	1,082.21

Being the amounts calculated by the Council, in accordance with regulation 6 of the Regulations, as the amounts of its Council Tax Base for the year for dwellings in those parts of its area to which one or more special items relate.

2. That the following amounts be now calculated by the Council for the year 2005/2006 in accordance with Sections 32 to 36 of the Local Government Finance Act 1992:-
- (a) £61,457,473 being the aggregate of the amounts which the Council estimates for the items set out in Section 32(2)(a) of the Act.
(Gross Expenditure including amount required for working balance).
- (b) £49,609,711 being the aggregate of the amounts which the Council estimates for the items set out in Section 32(3)(a) to (c) of the Act.
(Gross Income including reserves to be used to meet Gross Expenditure).

(c) £11,847,762 being the amount by which the aggregate at (a) above exceeds the aggregate at (b) above, calculated by the Council in accordance with Section 32(4) of the Act, as its budget requirement for the year.

(d) £6,750,128 being the aggregate of the sums which the Council estimates will be payable for the year into its general fund in respect of redistributed non-domestic rates, revenue support grant, additional grant of SSA reduction grant (increased by the amount of the sums which the Council estimates will be transferred in the year from its Collection Fund to its General Fund in accordance with Section 97(3) of the Local Government Finance Act 1988 (*Council Tax Surplus*) and increased by the amount of any sum which the Council estimates will be transferred from its Collection Fund to its General Fund pursuant to the Collection Fund (Community Charge) directions under Sec. 98(4) of the Local Government Finance Act 1988 made on 7 February 1994 (*Community Charge Surplus*).

(e) £130.67
$$\frac{(c) - (d)}{1(a)} = \frac{11,847,762 - 6,750,128}{39,010.22}$$

being the amount calculated at (c) above less the amount at (d) above, all divided by the amount at 1(a) above, calculated by the Council, in accordance with Section 33(1) of the Act, as the basic amount of its council tax for the year.

(*Average Council Tax at Band D for Borough Including Parish Precepts and Special Expenses*).

(f) £343,072 being the aggregate amount of all special items referred to in Section 34(1) of the Act. (*Parish Precepts and Special Expenses*).

(g) £121.88
$$\frac{(e) - (f)}{1(a)} = \frac{130.67 - 343,072}{39,010.22}$$

being the amount at (e) above less the result given by dividing the amount at (f) above by the amount at 1(a) above, calculated by the Council, in accordance with Section 34(2) of the Act, as the basic amount of its Council Tax for the year for dwellings in those parts of its area to which no special items relate.

(*Council Tax at Band D for Borough Excluding Parish Precepts and Special Expenses*).

(h)

Ash Priors	124.93	Neroche	133.43
Ashbrittle	133.00	North Curry	140.63
Bathealton	129.94	Norton Fitzwarren	140.56
Bishops Hull	134.57	Nynehead	141.97
Bishops Lydeard / Cothelstone	136.31	Oake	131.95
Bradford on Tone	134.50	Otterford	121.88
Burrowbridge	142.80	Pitminster	133.51
Cheddon Fitzpaine	128.23	Ruishton / Thornfalcon	139.42
Chipstable	130.55	Sampford Arundel	156.48
Churchstanton	144.05	Staplegrove	132.85
Combe Florey	136.21	Stawley	131.58
Comeytrowe	133.54	Stoke St Gregory	137.99
Corfe	131.49	Stoke St Mary	133.03
Creech St Michael	135.98	Taunton	123.58
Durston	122.59	Trull	132.06
Fitzhead	136.00	Wellington	138.38
Halse	134.06	Wellington (Without)	134.06
Hatch Beauchamp	132.14	West Bagborough	128.44
Kingston St Mary	135.68	West Buckland	140.47
Langford Budville	129.60	West Hatch	135.96
Lydeard St Lawrence / Tolland	130.39	West Monkton	126.55
Milverton	133.19	Wiveliscombe	136.66

being the amounts given by adding to the amount at (g) above, the amounts of the special item or items relating to dwellings in those parts of the Council's area mentioned above divided in each case by the amount at 1(b) above, calculated by the Council, in accordance with Section 34(3) of the Act, as the basic amounts of its Council Tax for the year for dwellings in those parts of its area to which one or more special items relate.

(Council Taxes at Band D for Borough, Parish and Special Expenses).

(i) See overleaf.

(The meeting ended at 7.00pm).

TAUNTON DEANE BOROUGH COUNCIL

EXECUTIVE MEETING

Monday 28 February 2005

Report Of The Waste Services Manager

(This matter is the responsibility of Executive Councillor Mark Edwards)

REVIEW OF PUBLIC CONVENIENCES

1. PURPOSE

- 1.1 The purpose of this report is to seek the approval of the Executive to implement the outcomes of the review of public conveniences.

2. BACKGROUND

- 2.1 The decision of Executive Councillor Mark Edwards to endorse the recommendation of the Health and Leisure Review Panel (HLRP) to carry out a series of investments and disinvestments in public conveniences was published in the Weekly Bulletin on 20 January 2005. The principle behind the decision was to utilise funds raised from the sale of some sites to improve the quality of the remaining facilities and generate on-going revenue savings.
- 2.2 This decision now requires Executive approval before it can be implemented.
- 2.3 A copy of the report to HLRP is attached (APPENDIX A). However, a number of changes have subsequently occurred that now need to be considered:
- There is consensus amongst the North Taunton Councillors that fitting out the shell of a freestanding public convenience built as part of the Surestart project is not the best solution. Research is therefore being carried out on the provision of a community facility within existing premises in the vicinity of Priorswood Place.
 - The forecasted costs of developing the Vivary Hub have increased and for supervised toilets to be provided this project requires further financial assistance.
 - Tenders have been received for the re-building of the North Street C/P toilets in Wellington. These are in excess of the current budget allocation.

3. FINANCIAL SUMMARY AND IMPLEMENTATION PLAN

3.1 The revised potential financial costs and benefits of the review after taking these factors into account are summarised below:

	Scheme						
Capital	Pr/wd £	K/stn Rd. £	T/crd St. £	H/tn Rd. £	W/tn Lnds. £	N. St. W £	Total £
Capital spend	10,000	25,000			70,000	22,500	127,500
Capital receipt/saving	-45,000		-80,000	-80,000			205,000
Net cost to TDBC	-35,000	25,000	-80,000	-80,000	70,000	22500	-77,500
Revenue savings PA	4,000	5,000	5,000	5,000			19,000

Key: Pr/d = Priorswood, K/stn Rd. = Kingston Road, T/crd St. = Tancred Street,
H/tn Rd. = Hamilton Road, W/tn Lnds. = Wilton Lands,
N. St. W = North Street C/P Wellington

4. RECOMMENDATION

4.1 It is recommended that the Executive notes the changes to the Health and Leisure Review Panel Report and recommends to Council the implementation plan and necessary changes to the approved capital programme.

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TAUNTON DEANE BOROUGH COUNCIL

HEALTH AND LEISURE REVIEW PANEL

Tuesday 11 January 2005

Report Of The Waste Services Manager

(This matter is the responsibility of Executive Councillor Mark Edwards)

REVIEW OF PUBLIC CONVENIENCES

1. PURPOSE

- 1.1 The purpose of this report is to review the provision of Public conveniences in Taunton Deane.

2. BACKGROUND

- 2.1 A report was presented to HLRP in February 2004 that recommended that the number of public conveniences that the Council owns be rationalised on the basis that cleaning and maintenance budgets should be concentrated on a smaller number of facilities in strategic locations. (summary outcomes attached at APPENDIX 1). The principle behind the rationalisation was to move towards fewer but better quality facilities, that would enhance the impression of the Borough.
- 2.2 The report recommended the approval of the summary outcomes of the review of public conveniences. The recommendation was approved by the panel and endorsed by the executive Councillor.
- 2.3 It is now possible to put forward several opportunities to implement the summary outcomes and which cumulatively realise a net financial benefit to the Council.

3. Priorswood

The toilets at the rear of the library have been shut for a number of years following excessive levels of vandalism. The area is now part of the planned development of the Surestart family centre. The current agreement with Surestart is that:

- Surestart will demolish and landscape the existing public conveniences.
- In compensation for this loss of facility Surestart will erect the shell of a small (4m x 4m) vandal resistant public convenience up to a maximum value of £20k.
- The council will then fit out the shell using £35k capital held in the public convenience account.

- The continued closure of the public conveniences has not generated significant local concern. It is therefore considered that the £35k capital earmarked for this project could be utilised to better effect elsewhere.
- Surestart have agreed that if they were not required to build the shell they would pay the Council £10k compensation providing that it is used to improve public conveniences within the Deane.

It should be noted that the perception is that most genuine users of toilet facilities in Priorswood would be elderly local residents using the nearby shops. This would clearly be a better site for any new toilets. There is also a possibility that the £10k contribution from Surestart could be used to invest in improved community facilities for disabled and elderly people in the Priorswood Community Centre.

4. Kingston road

The toilets near the station on Kingston Road have been shut for over a year as a result of low usage, vandalism and the generally poor condition of the facilities.

The continued closure of the public conveniences has not generated significant local concern and it is proposed that the facilities should be demolished and the area landscaped. The cost of these works is estimated at £25k.

The potential annual revenue savings including rates associated with the demolition of the Kingston road toilets is £5k per annum.

5. Tancred Street

The toilets on Tancred St. were closed for a temporary period when the Council was having problems with the cleaning contract. (It was necessary to match the number of facilities that were cleaned to the available cleaning staff). This action attracted some adverse media reaction.

It is the view of the waste services unit that the toilets are not well used or strategically located. A people counter was used to try and assess usage but unfortunately this did not provide reliable information.

The toilets are situated adjacent to a development site for a number of semi-detached town houses in which the Council has an interest. The site has planning permission and if developed the existing public toilets will become a “bad neighbour”. Alternatively, the sale of the facilities for re-development would allow a further two semi detached properties to be built as part of the development removing the source of potential complaints.

The Council's Chief Valuer has estimated that the value of the site for development would be £80 - 100k.
The potential annual revenue savings including rates associated with the demolition of the Tancred Street toilets is £5k per annum.

6. Hamilton Road

These toilets were closed in similar circumstances to Tancred St. However, due to very low usage and no adverse local reaction they have remained closed for over a year.

The site is suitable for development and draft plans have been produced that show that two semidetached houses could be built on the site.

Subject to planning approval, the Council's Chief Valuer has estimated that the value of the site for development would be £80 - 100k.

The potential annual revenue savings including rates associated with the demolition of the Hamilton Road toilets is £5k per annum.

7. Wilton Lands

The Wilton Lands facilities have been identified as being in need of refurbishment or replacement. They are strategically located adjacent to a car park frequently used by golfers and a children's play area and receive a high level of use.

If the £35k currently "earmarked" for the Surestart project (see 3. above) was to be released then it would be recommended that this should be used to refurbish Wilton Lands. However, there may well be an opportunity to improve the facilities by providing supervised public conveniences within the "Vivary Hub"

8. ASSET MANAGEMENT GROUP

These proposals were discussed at a meeting of the Asset Management Group on 7 December 2004.

The proposals were supported by the Group with the additional comment that the Proposed sale for redevelopment as housing of the Tancred Street site would have the further benefit of improving the overall appearance of the street.

9. FINANCIAL SUMMARY

This proposal has been discussed with the Financial Services Manager.

The potential financial costs and benefits of the above proposal are summarised below:

Capital	Scheme					
	Priorswood	Kingston Rd	Tancred Street	Hamilton Road	Wilton Lands	Total
	£	£	£	£	£	£
Capital Spend	10,000	25,000			40,000	75,000
Capital Receipts/Savings	-45,000		-80,000	-80,000		-205,000
Net cost to TDBC	-35,000	25,000	-80,000	-80,000	40,000	-130,000
Revenue Savings		5,000	5,000	5,000		15,000

10. RECOMMENDATIONS

10.1 It is recommended that the Panel requests that the Executive Councillor approves:

- The discontinuation of the current agreement with Surestart to erect the shell of a public convenience at Priorswood.
- The demolition and landscaping of the public conveniences at Kingston Road
- Sale of the Tancred Street public conveniences on terms to be approved by the Chief valuer.
- Sale of the Hamilton Road public conveniences on terms to be approved by the Chief valuer.
- The provision of supervised public conveniences in the proposed "Vivary Hub or refurbishment of the Wilton Lands public conveniences.

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SUMMARY OUTCOMES

- 4.1 The current arrangements for cleaning toilets twice each day regardless of usage is inflexible and inappropriate. Consideration should be given to focussing the cleansing service according to need.
- 4.2 The current policy of leaving facilities open all year round regardless of demand exposes some facilities to unnecessary vandalism, increases maintenance and utility costs and places a strain on the cleansing service. Where appropriate consideration should be given to opening facilities to cater for seasonal demand.

- 4.3 Public conveniences that do not meet an appropriate standard of health, hygiene and safety and where usage and need are low should be closed and resources redirected to improve standards at the remaining facilities.
- 4.4 The number of facilities provided by the Council should be rationalised to ensure that higher quality services are targeted at the facilities with greatest need.
- 4.5 The provision of public conveniences should be kept under review and opportunities taken, where possible to work in partnership with user groups to ensure that the facilities meet the needs of the users.
- 4.6 The provision of public conveniences in Taunton Town Centre should form part of the "Vision for Taunton". This could affect facilities at the Bus Station, Goodlands Gardens, Castle Green, Castle Walk, Canal Road and Priory Bridge Road. In most cases these facilities require attention and their replacement should be included in any development plans.

Extract from a report to HLRP on 19.2.04

TAUNTON DEANE BOROUGH COUNCIL

EXECUTIVE 9TH MARCH 2005

REPORT OF THE FINANCIAL SERVICES MANAGER

(This matter is the responsibility of Councillor Williams, Leader of the Council)

TREASURY MANAGEMENT & INVESTMENTS STRATEGY FOR 2005/2006

EXECUTIVE SUMMARY

The Council is required to consider an annual Treasury Management Strategy, the key points of the 2005/06 Strategy are as follows,

- This year's documentation incorporates the Annual Investments Strategy.
- External Borrowing remains relatively static at £19.5m, with average cost reducing due to refinancing. (5.31% current, 6.18% last year). Possibility exists for further reductions in 05/06.
- Return on investments up from 3.85% last year to 4.21% currently. Expectation of small reduction on 05/06 or no change.
- Uncertainty over precise timing of peak and then decline in short term interest rates, but consensus is downward expectation.
- Borrowing / refinancing and investment strategy based on seeking out favourable (temporary) movements in interest rates due to market reaction to economic data.
- Summaries on Prudential Indicators, economic data and approach to investments provided in Appendices.

1. PURPOSE OF REPORT

- 1.1 The purpose of this report is to present the strategy for treasury management activity for the financial year 2005/06.

2. INTRODUCTION

- 2.1 The Council has customarily considered an annual Treasury Strategy Statement under the requirement of the CIPFA Code of Practice on Treasury Management, which was adopted by the Council on 26/02/02. The 2003 Prudential Code for Capital Finance in local authorities has introduced new requirements for the manner in which capital spending plans are to be considered and approved, and

in conjunction with this, the development of an integrated treasury management strategy.

- 2.2 The Prudential Code requires the Council to set a number of Prudential Indicators over the forthcoming three-year period. These were considered and approved by Council on the 22nd February 2005 as part of the budget setting process. Details of the Prudential Indicators can be found in Appendix A.
- 2.3 The suggested strategy for 2005/06 in respect of the following aspects of the treasury management function is based upon the Treasury officers' views on interest rates, supplemented with market forecasts provided by the Council's treasury advisor. The strategy covers:
- The current treasury position;
 - Prospects for interest rates;
 - The borrowing strategy;
 - The investment strategy;
 - Prudential Indicators

3. CURRENT PORTFOLIO POSITION

3.1 The Council's treasury portfolio position at 24/02/05 comprised:

	Principal £m	Principal £m	Average Rate
Fixed rate funding	PWLB 19.5		
TOTAL DEBT		19.5	5.31%
TOTAL INVESTMENTS		18.8	4.21%

4. PROSPECTS FOR INTEREST RATES

- 4.1 There is some doubt and discussion as to whether short-term interest rates have peaked or not, however, there is more of a consensus that the trend will be downward in the future. Amongst the lowest figures predicted is 3.5% by the end of the next financial year. Should this prove to be the case pressure would be on investment returns however, some offset would be possible through cheaper debt. Further details of estimates provided by our Treasury Management advisors and other forecasters can be found in Appendix B.
- 4.2 Long term rates (25yrs +) are not expected to rise as much as previously thought, hovering around anything between 4.5% and 4.75%, dependant on forecaster.

5. BORROWING STRATEGY

- 5.1 The Council's strategy for borrowing remains looking for favourable movements in interest rates that will offer the opportunity to take discounts when redeeming debt or refinancing it.
Alternatively, with the expected trend towards reducing short-term rates (base rate), there may be opportunities to move into variable rated debt, thus relieving the debt cost to the authority. Either way, with no immediate plans to repay debt in full, the focus remains on minimising the cost to the General Fund and ultimately the taxpayer.
- 5.2 It is expected that the Council will be able to take advantage of the scenario described above when loans to the value of £1.5m mature during 2005/06.

6. INVESTMENTS STRATEGY

- 6.1 With short terms interest rates expected to slide during the forthcoming year, the expectation is that investment returns will not exceed much beyond budgeted levels, as we saw in the current 2004/05 financial year. This however will not change our tactics of seeking value out of favourable, but temporary, 'blips' in the market, as it reacts to sentiment and data from various economic sources. The policy has achieved us much success in the past by 'piggybacking' the advice received from advisors and is considered prudent to follow in the future.
- 6.2 The investment tools used for Council's cash flows remain unchanged from Annual Investment Strategy Report dated 11/02/04, as does much of the criteria and level of exposure chosen prior to investment. These have been summarised in Appendix C.

7. IMPACT ON CORPORATE PRIORITIES

- 7.1 Treasury Management supports the entire range of services within the Council and consequently has an impact on all Corporate Priorities.

8. RECOMMENDATIONS

- 8.1 The Executive is requested to approve the proposed Treasury Management Strategy outlined in this report.

Background Papers

Executive 09/02/05 – General Fund Revenue Estimates 2005/06

Executive 11/02/04 – Annual Investments Strategy

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Appendix A

PRUDENTIAL INDICATOR	2003/04 £'000	2004/05 £'000	2005/06 £'000	2006/07 £'000	2007/08 £'000
	actual	probable outturn	estimate	estimate	estimate
Capital Expenditure					
General Fund	£3,794,266	£3,893,834	£4,432,430	£2,052,000	£1,991,500
HRA	£4,016,529	£7,395,201	£5,109,800	£4,335,000	£4,335,000
TOTAL	£7,810,795	£11,289,035	£9,542,230	£6,387,000	£6,326,500
Ratio of financing costs to net revenue stream					
General Fund	-0.71%	-2.88%	0.79%	1.14%	1.62%
HRA	9.66%	4.74%	4.46%	4.14%	3.95%
Net borrowing requirement					
brought forward 1 April	£8,692,159	£5,029,550	£6,532,227	£6,020,166	£5,011,702
carried forward 31 March	£5,029,550	£6,532,227	£6,020,166	£5,011,702	£5,005,938
in year borrowing requirement	-	£1,502,677	-	-	-£5,764
	£3,662,609		£512,061	£1,008,464	
Capital Financing Requirement as at 31 March					
General Fund	£8,067,714	£7,441,053	£8,067,714	£7,808,193	£7,817,621
HRA	£14,291,342	£14,291,342	£14,291,342	£14,291,342	£14,291,342
TOTAL	£22,359,056	£21,732,395	£22,359,056	£22,099,535	£22,108,963
Incremental impact of capital investment decisions	£ p	£ p	£ p	£ p	£ p
Increase in council tax (band D)	-£0.78	-£3.36	£0.97	£1.44	£2.10
Authorised limit for external debt -					
TOTAL	£40,000,000	£40,000,000	£40,000,000	£40,000,000	£40,000,000
Operational boundary for external debt -					
TOTAL	£30,000,000	£30,000,000	£30,000,000	£30,000,000	£30,000,000
Upper limit for fixed interest					

rate exposure					
Net interest re fixed rate borrowing / investments	100%	100%	100%	100%	100%
Upper limit for variable rate exposure					
Net interest re variable rate borrowing / investments	50%	50%	50%	50%	50%
Upper limit for total principal sums invested for over 364 days					
(per maturity date)	£2m or 25%	£2m or 25%	£2m or 25%	£2m or 25%	£2m or 25%

Interest Rate Forecasts

The tables below shows a variety of forecasts published by a number of institutions. The first three are individual forecasts including those of Sector Treasury Services (the Councils' advisors) UBS and Capital Economics (all independent forecasting consultancies). The final table represents summarised figures drawn from the population of all major City banks and academic institutions.

Sector View interest rate forecast – February 2005

	Q/E1 2005	Q/E2 2005	Q/E3 2005	Q/E4 2005	Q/E1 2006	Q/E2 2006	Q/E3 2006	Q/E4 2006	Q/E1 2007	Q/E2 2007	Q/E3 2007	Q/E4 2007
Base rate	4.75%	5.00%	4.75%	4.75%	4.50%	4.50%	4.50%	4.50%	4.25%	4.50%	4.50%	4.75%
5yr Gilt Yield	4.75%	4.75%	4.75%	4.50%	4.50%	4.50%	4.50%	4.50%	4.50%	4.75%	4.75%	5.00%
10yr PWLB Rate	4.75%	4.75%	4.75%	4.75%	4.50%	4.50%	4.50%	4.50%	4.75%	4.75%	4.75%	4.75%
25yr PWLB Rate	4.75%	4.75%	4.75%	4.75%	4.50%	4.75%	4.50%	4.50%	4.75%	4.75%	4.75%	4.75%

UBS Economic interest rate forecast (for quarter ends) - January 2005

	Q/E1 2005	Q/E2 2005	Q/E3 2005	Q/E4 2005	Q/E1 2006	Q/E2 2006	Q/E3 2006	Q/E4 2006
Base Rate	4.75%	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%
10 yr PWLB rate	4.70%	4.60%	4.65%	4.70%	4.70%	4.70%	4.70%	4.70%
25 yr PWLB rate	4.55%	4.55%	4.60%	4.65%	4.65%	4.65%	4.65%	4.65%

Capital Economics interest rate forecast – January 2005

	Q/E1 2005	Q/E2 2005	Q/E3 2005	Q/E4 2005	Q/E1 2006	Q/E2 2006	Q/E3 2006	Q/E4 2006
Base Rate	4.75%	4.50%	4.25%	4.00%	3.75%	3.50%	3.50%	3.50%
5yr gilt yield	4.40%	4.30%	4.20%	4.00%	3.80%	3.60%	3.70%	3.80%
10 yr PWLB rate	4.55%	4.45%	4.45%	4.35%	4.25%	4.15%	4.25%	4.35%
25 yr PWLB rate	4.50%	4.40%	4.50%	4.45%	4.50%	4.50%	4.55%	4.55%

HM Treasury – 16.02.2005 summary of forecasts of 26 City and 14 academic analysts for Q4 2005 and 2006. (2007 – 2009 are as at February 2004 but are based on 18 forecasts)

	Repo	Quarter ended		annual average repo rate		
		Q4 2005	Q4 2006	ave. 2007	ave. 2008	ave. 2009
Indep. forecasters	4.75%	4.69%	4.55%	4.58%	4.76%	4.70%
BoE Base Rate	4.75%	4.69%	4.55%	4.58%	4.76%	4.70%
Highest base rate	4.75%	5.75%	5.75%	5.25%	5.31%	5.30%
Lowest base rate	4.75%	4.00%	3.50%	4.00%	3.83%	3.75%

Extracts from Treasury Management Practices Document

1.5 Credit & Counterpart Policies

- 1.5.1 Criteria to be used for creating / managing approved counterparty lists and limits
- i) The Chief Financial Officer will formulate suitable criteria for assessing and monitoring the credit risk of investment counterparties and shall construct a lending list comprising time, type, sector and specific counterparty limits.
 - ii) Treasury management staff will add or delete counterparties to/from the approved counterparty list in line with the policy on criteria for selection of counterparties. The complete list of approved counterparties will be included in the annual Treasury Management Strategy report.
 - iii) This Council will use credit criteria in order to select creditworthy counterparties for placing investments with.
 - iv) Credit ratings will be used as supplied from one or more of the following credit rating agencies supplied via its Treasury Management advisers, Sector Treasury Services Ltd.: -
 - Fitch
 - vi) The minimum level of credit rating, using Fitch's, for an approved counterparty will be as follows: -
 - 'AA' Long Term
 - 'F2' Short Term
 - 'C' Individual
 - & '3' Support
 - vii) When lending to UK Building Societies, no specific rating criteria are to be used, however lending will be limited to the top 20 societies based on asset size.
 - viii) The maximum exposure to any single counterparty and / or wholly owned subsidiaries (in aggregate) shall be no more than £2,000,000 (two million, pounds), or 25% of the investment pool, whichever the lower, at the outset of the transaction.
 - ix) The maximum period for investments will be 2 yrs.
 - x) The maximum period for investment for subsidiaries of counterparties that do not have credit ratings in their own right, but do have unconditional guarantees from a parent, is 2 yrs, in line with the maximum period outlined above.
 - xi) Country of origin shall not be a bar on entering in to transactions with counter-parties.

- xii) Dealing shall be conducted, either directly or via a broker, having first consulted the FSA register of organisations authorized to accept deposits within the UK. (See Section 1.7.3 below)

4.2 Approved instruments for investments

4.2.1 In accordance with powers given by virtue of The Local Government Act 2003 the instruments approved for investment and approved for use at this Council:

- Deposits with banks, building societies or local authorities (and certain other bodies) for up to 2 yrs.
- Business Reserve Accounts
- Money Market Funds
- Debt Management Account Deposit Facility (DMADF)

TAUNTON DEANE BOROUGH COUNCIL

EXECUTIVE 9TH MARCH 2005

REPORT OF THE HEAD OF RESOURCES

This matter is the responsibility of Councillor Williams (Leader of the Council)

INTERNAL AUDIT PARTNERSHIP

EXECUTIVE SUMMARY

Three authorities (Taunton Deane Borough Council, South Somerset District Council, and Mendip District Council) are proposing to create a Partnership to operate their Internal Audit Services. This brings significant benefits to all Partners, in terms of quality, sustainability and resources. The Partnership will be formed using the Joint Committee model (outlined in s101 LGA 1972). Provided that all necessary steps can be concluded on time it is proposed that Taunton Deane and South Somerset establish an internal audit partnership effective from 1st April, 2005. It is further proposed that Mendip join the partnership, on the expiration of their current contract with Capita, on 1st July, 2005.

This report sets out the principles of how the Partnership will operate. The Corporate Governance Committee have considered this report and present it to the Executive for approval.

1. Purpose of Report

1.1 To inform Members, and seek approval for, a proposed Internal Audit Partnership between Taunton Deane Borough Council (TDBC), South Somerset District Council (SSDC), and Mendip District Council (MDC).

2. Background

2.1 All local authorities are required, by the Local Government Act 1972 and the Accounts and Audit Regulations 2003, to provide an internal audit function. This can be achieved in a number of ways including by in-house provision, outsourcing or partnership.

2.2 Officers from all three Councils have been in discussion for some time regarding the potential for partnership working. Since July 2004 a number of "joint audits" have been undertaken by TDBC and SSDC. This has helped build relationships between the two audit teams, and more importantly, helped staff recognise that there are opportunities to learn from each other.

2.3 In addition to joint working, a significant amount of research has been carried out – looking at other successful local government internal audit partnership arrangements. TDBC and SSDC visited the North Yorkshire Partnership in November 2004 and discussed the benefits of partnership with one Chief Finance Officer and the Partnership's Audit

Manager. This visit proved useful – not only in confirming the positives of partnership working, but also in highlighting areas where their set-up could be improved even further.

- 2.4 The conclusion of both the joint audit working, and the research is that the three authorities should proceed towards a formal internal audit partnership.
- 2.5 Provided that all necessary steps can be concluded on time it is proposed that TDBC and SSDC establish an internal audit partnership (South West Audit Partnership (SWAP)) effective from 1st April, 2005. It is further proposed that Mendip join the partnership, on the expiration of their current contract with Capita, on 1st July, 2005.

3. Motivation for Change

- 3.1 A number of factors have recently come together that make the setting up of a partnership possible. These include:
 - A wider recognition that partnerships, for particular services, can provide the most cost effective and viable solution.
 - The difficulty, nationally, in recruiting experienced internal auditors.
 - The difficulty in small Councils affording specialist audit skills, such as IT and Contract Auditors.
 - The decision by Mendip District Council to bring their internal audit service in-house, and to seek a partner to help in the delivery of the service. Capita currently provides the service under a contract that runs out at the end of June 2005.
- 3.2 The Efficiencies Agenda clearly sets out the Government's vision for local authorities to be working together to provide more efficient and effective services. Currently all authorities in Somerset are individually providing an internal audit service – this cannot be efficient use of limited taxpayers resources. The current structure across Somerset also has inherent problems with communication, speed of service delivery, capacity, coverage, and motivation of staff who are stuck in small teams with little room for personal development.
- 3.3 The creation of South West Audit Partnership will provide the three founder authorities with a better quality service for the same resources. Financial benefits will materialise as new partners join the organisation over the next five years. Indeed, the longer-term benefits could be shared between all public sector organisations in the area, not just local authorities.
- 3.4 It is recognised that some of the staff transferring to SWAP may be resistant to change, and therefore a strategy has been put in place to motivate commitment to change over the coming months. During the transition phase some staff may continue to feel unsettled and will be kept fully informed of events. Staff will be in a position to add real

value to the planning process and will be able to help identify risk, pitfalls and barriers to implementation.

4. The Vision

4.1 The aim of the Partnership will be to provide high quality, cost effective internal audit services to its customers. By forming the Partnership, the following benefits will accrue:-

- The ability to share resources.
- The ability to recruit specialist skills.
- The capacity to improve the quality of internal auditing.
- Potential cost benefits in the future as the Partnership grows.

5. The Legal Framework

5.1 A number of alternative Partnership models exist, the most common being:-

Partnership Board

- Designed to fulfil a specific contractual need.

Joint Committee

- A formal local authority committee constructed under s101 of the Local Government Act 1972 (or may, where appropriate, be joint executive arrangements under the Local Government Act 2000).
- Policy determined by local authority Members/Officers for the purpose determined/delegated by the principal authorities. Managed by designated officers.

Non-Profit Distributing Company (IPS or Company limited by guarantee)

- A separate entity from participating local authorities – can be established under various Acts.
- Composition and purpose set out in the Memorandum and Articles of Association.

For Profit Entity (Company limited by shares)

- As for not-for-profit but dividends payable.
- The normal preferred structure if profits are a key motivator and/or private sector involved.

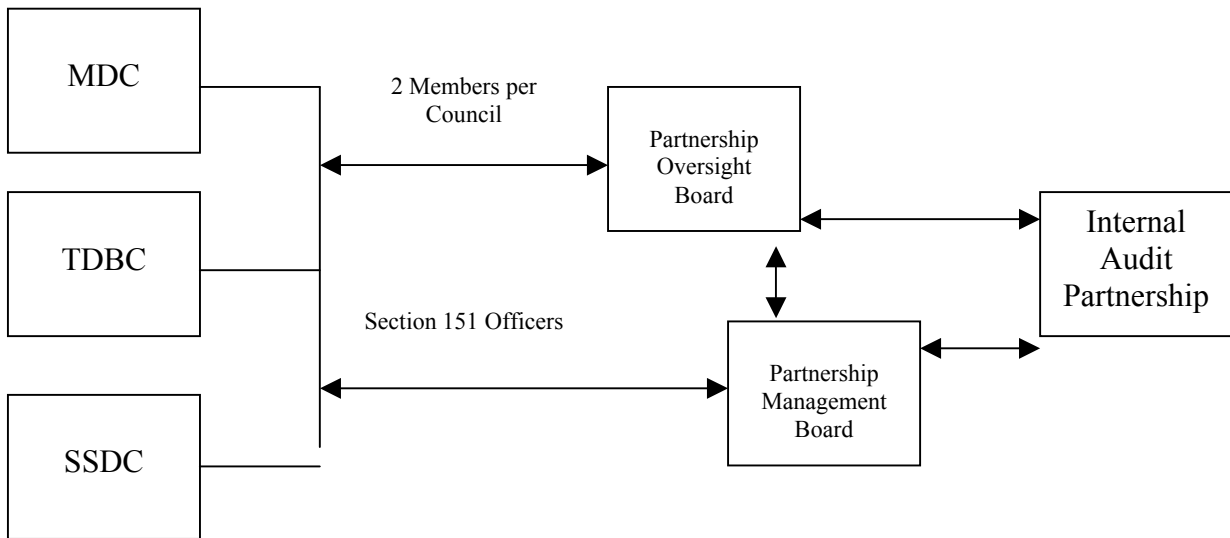
5.2 The recommended model is to establish a Joint Committee. This has the following advantages:-

- The arrangement is well understood, has been tried and tested, and is relatively easy to establish.
- Partner Authorities have influence over policy and performance through the Oversight and Management Boards.
- Staff remain local government employees.
- The focus is on the provision of quality services and not for profit.
- Can be easily expanded to accommodate other public sector partners.

6. Governance Arrangements

6.1 Precise details of the management arrangements for the Partnership are being prepared and will form part of the formal agreement (which is being worked on by legal representatives for all Partners). If Members agree to the formation of the Partnership, then a Board of members will be formed to oversee the partnership – comprising two Members from each Partner. In addition, a senior management Panel, comprising the S151 Officers from each Partner will be formed to oversee the operational activities.

6.2 The overall governance arrangements will be as follows:



7 Management and Operating Arrangements

7.1 A project team, including legal, financial, HR and IT expertise have been working on the operational arrangements for some months now. Some of the more detailed issues are still under discussion, and will be finalised over the coming weeks.

7.2 It is not essential that these are finalised prior to transfer providing the following **broad principles** are agreed:-

- The Partnership will be established under a legal agreement that all parties will sign. The agreement will specify the basis on which each partner provides resources and the basis on which services will be provided to the partnership.
- Each partner will define its own internal audit needs, including provision of a tactical and strategic audit plan. This work may or may not be done by the partnership audit team.
- Each partner will have an equal say (or vote) in the partnership, regardless of size.
- Based on the defined audit needs, the partnership will calculate the total cost of audit provision and define the partnership staffing needs.

- The Partnership Management Board will have the final say on the total cost of the audit service provided to each Partner, and on staffing levels (including the initial determination of staffing needs and any additional increases).
- The services of SWAP will be provided by a single audit team with officers based at the three partner Councils' main sites, or any other site a partner may stipulate.
- The powers of the Partnership Board, and the Partnership Management Board will be specified in the partnership legal agreement. Each partner will specify, within their Financial Regulations, the scope and extent of internal audit authority of the Partnership Audit Team.
- The partnership will be formed under section 101 of the Local Government Act 1972 and will therefore be exempt from EU procurement rules.

7.3 The management structure is being finalised, and all Partners agree that one post of Head of Internal Audit should lead the Partnership Team. Within the three existing internal audit teams, there is no obvious candidate for this role.

7.4 The current Group Manager (Business Support) at SSDC is a qualified internal auditor with more than 20 years experience – and it is proposed that he should transfer full-time to the Partnership in the role of Head of Internal Audit. He is an excellent candidate for this role - a view fully supported by the three Partner organisations s151 Officers. The main duties of this post will be:-

- To prepare audit plans for each Council.
- To manage the audit team and its resources.
- To develop the business plan and grow the Partnership.

8 Employee Issues

8.1 The Chief Personnel Officers in each authority are currently working on the detail of this proposal. In very simple terms, the following summarises the key issues around employees:-

8.2 Communication and consultation.

Staff have been, and will continue to be, consulted throughout the process. Regular feedback sessions and joint team building days have occurred and more are planned. Unions and staff-side have also been kept informed of the proposals and have now been formally consulted.

8.3 TUPE transfer

The partnership will be established on the basis of one hosting Authority (to be SSDC) to act as employer, for 'pay and rations', for the partnership. This will result in staff from two of the Councils being subject to TUPE transfer to the hosting Council.

8.4 Standardisation of terms and conditions

Where possible and practical the principle of 'best of the best' will be adopted. For instance, if one Council has a more flexible flexi-time scheme, then that would be adopted for all staff. Detailed agreement has yet to be reached on this. It may be that, due to the timescales involved, that staff will transfer on existing terms and conditions.

8.5 Membership of existing pension schemes to continue.

By adopting the hosting Council model, all staff will remain local government employees and will continue to be included in the Somerset County Council pension scheme.

9. Financial Arrangements

- 9.1 The Financial Services Managers in each authority are finalising the detailed arrangements required in order to create this Partnership arrangement.
- 9.2 The broad principle that the cost of internal audit should not increase because of the creation of the Partnership is accepted.
- 9.3 The intention is for the Partnership to cost TDBC no more than current annual costs over a five-year period. This will require a contribution from balances of £20,000 to support the Partnership initially, but will be repaid over 5 years. It is hoped that this can be found within existing approved budgets (potentially from the end of financial year underspend).

10 Conclusions and Next Steps

- 10.1 There are clear advantages to entering into an Internal Audit Partnership, including quality, sustainability and resource issues. Experience suggests that Partnerships are often difficult to establish, but once they are, the benefits can be quickly realised.
- 10.2 Each Partner authority will formally recommend the formation of SWAP to their respective organisations during March 2005. At TDBC, this report has been considered and supported by the Corporate Governance Committee (21 Feb) and is now being presented to the Executive for formal approval.
- 10.3 Meantime, work continues on the detail of the legal agreement, the HR, Finance and IT issues. The project is being managed using the broad principles of PRINCE2.
- 10.4 The Chief Finance Officers will take responsibility for ensuring the detailed business plan, and measures of success are developed, and that the necessary corporate governance arrangements are put in place at each Partner authority.

11 Recommendations

11.1 The Executive are requested to recommend that:-

1/ An Internal Audit Partnership (initially between TDBC, SSDC, and MDC) is established under s101 of the Local Government Act 1972 (Joint Committee).

2/ The Internal Audit Partnership will commence on 4 April 2005 between TDBC and SSDC, with MDC joining on 1 July 2005.

3/ The initial contribution of £20,000 is found from existing approved budgets (year end underspend), and is repaid over five years.

4/ The final agreement of the Partnership Business Plan, host authority arrangements, legal agreement, and working practices is delegated to the Head of Resources (subject to the Partnership demonstrating a break-even position within 5 years).

5/ There will be two TDBC Member representatives on the Partnership Oversight Board. The Members Services Manager will liaise with the Group Leaders on the most appropriate method of filling these posts.

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TAUNTON DEANE BOROUGH COUNCIL

EXECUTIVE 9th MARCH 2005

REPORT OF THE HEAD OF RESOURCES

This matter is the responsibility of Councillor Williams (Leader of the Council)

ODPM CONSULTATION PAPER ON 3-YEAR REVENUE AND CAPITAL SETTLEMENTS

Executive Summary

The Office of the Deputy Prime Minister (ODPM) has issued a consultation paper setting out proposals for three-year revenue and capital settlements. The system is due for implementation from 2006/07 with a view to announcing local authority finance settlements for 2006/07 and 2007/08 during 2005. This report outlines the proposals, and sets out proposed response to the consultation paper.

1. Purpose of Report

- 1.1 To inform Members of the contents of the ODPM's consultation paper on three-year revenue and capital settlements.

1. Background

- 1.1 The Government introduced three-year financial settlement for its own departments in the Comprehensive Spending Review in 1998. Following a commitment in the 2004 Spending Review, the ODPM have now published a consultation paper setting out proposals for three-year revenue and capital settlements for local authorities, police authorities, and fire and rescue authorities in England.

2. What The Consultation Paper Covers

- 2.1 The income for local authorities, police authorities, and fire and rescue authorities comes from a variety of sources. This includes formula grant (Revenue Support Grant (RSG) and Business Rates (NNDR)), and specific grant, locally raised council tax and capital grants. In addition, authorities receive income through other sources including fees and charges. The proposals in the consultation paper cover the majority of grants from central government.
- 2.2 A summary of each area of change is set out in the remainder of this report. Large sections of the consultation paper are of a technical nature – the summaries below are an attempt to consolidate the issues raised in each.

2.3 Due to the technical nature of this consultation paper, the Head of Resources will respond on behalf of the Council.

3. The Government's Overall Approach To Three-Year Settlements

3.1 The Government believes that the introduction of three-year settlements for authorities will:-

- Provide greater certainty in funding for local services;
- Allow organisations that rely on authorities for funding to introduce a multi-year approach to funding;
- Enable better risk management leading to greater stability in council tax increases;
- Strengthen financial management;
- Increase flexibility, autonomy and accountability at the local level.

3.2 The proposed approach will mirror that for government departments in the Spending Review – with three-year settlements being rolled forward every two years. This means that the last year of one review forms the first year of the next review. As the next Spending Review is due in 2006 it is anticipated that there will need to be special arrangements for the first settlement as it can only cover the two remaining years of Spending Review 2004 (2006/07 and 2007/08).

3.3 The consultation paper also highlights the need for the 2007/08 grant settlement to reflect council tax revaluation, which is due to be implemented on 1st April 2007.

3.4 The Government is also proposing to align changes to local authority functions with the Spending Review. This means that changes in responsibilities, and hence funding totals, will be made at the outset. Unplanned functional changes will not be made during the three-year period unless there is a strong case for doing so.

4. Formula Grant Settlement

4.1 The Government is seeking views on the shape of the future formula grant system to accommodate three-year settlements. This could result in fundamental changes in the way that formula grant is allocated to authorities.

4.2 The consultation paper recognises that a balance needs to be struck between the predictability of the three-year figures against the desire of allocating resources closely to the need and reflecting the most up to date information available.

4.3 Options discussed in the paper include:-

- A floor increase in grant with variable top-ups for relative service costs calculated by formula;

- A flat-rate percentage increase;
- A simpler formula with a smaller number of indicators.

5. Specific Grants

- 5.1 It is proposed to make three-year allocations to authorities unless there are overriding reasons against this. Grants that are paid on an expenditure basis, or are based on performance are likely to be excluded from this.

6. Capital Allocations

- 6.1 The Government accepts that the longer lead-in times required for capital investment make forward certainty particularly important. It is proposed that as far as practicable, there should be firm certainty for capital allocations.

7. Three Year Budget and Council Tax Information

- 7.1 The consultation paper contains proposals for local authorities to publish indicative three-year budgets and council tax levels. Views are sought on how this might be achieved, and what types of circumstances might merit alteration to three-year budgets and council tax forecasts.

- 7.2 The Government consider that, with certainty of grant entitlement, authorities should be able to fix their budgets three-years ahead (and encourage Parish Councils to do the same).

8. Context For Implementation

- 8.1 The consultation paper stresses the need to consider the practical and legislative implications of three-year settlements and their links to wider reforms. These are as follows:-

- The Lyons Inquiry (local government funding);
- The Efficiency Review (Gershon)
- Govt's Strategy For Local Government (due 2005)
- Introduction of Local Area Agreements

- 8.2 The Government is also considering the best way to move to a three-year settlement for Housing Revenue Account subsidy.

9. Recommendation

- 9.1 The Executive is requested to note:-
A/ the proposals in the consultation paper; and
B/ that the Head of Resources will respond on behalf of the Council.

**Contact Officer:-
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TAUNTON DEANE BOROUGH COUNCIL

EXECUTIVE – 9 MARCH 2005

REPORT OF THE FORWARD PLAN MANAGER

THE LOCAL DEVELOPMENT FRAMEWORK:- THE LOCAL DEVELOPMENT SCHEME

(This matter is the responsibility of Executive Councillor Bishop)

1. PURPOSE OF THE REPORT

- 1.1** To inform Members of the Executive on the contents of the proposed Local Development Scheme (LDS) and to seek its approval for submission to the Government Office for the South West.

2. SUMMARY

- 2.1** The LDS is a public statement of the local planning authority's three year programme for the intended preparation and delivery of its Local Development Documents (LDD's) which form part of the Borough Councils Local Development Framework (LDF). The LDF itself will provide a 'folder' of interrelated documents setting out overall spatial planning strategy for the Borough to period up until 2021.
- 2.2** The local planning authority is required to submit their LDS to the Secretary of State (represented by GOSW) before 28 March 2005. The Borough Council's LDS is attached as an Appendix to this report.

3. BACKGROUND

- 3.1** In November 2004, SPTED received a report from the Forward Plan Manager regarding the new planning system and the required linkages with the Community Strategy. This report focuses on the Local Development Scheme (LDS), another key component of the new planning system.
- 3.2** Under the Planning and Compulsory Purchase Act (2004) the existing Local Plan system was replaced by a Local Development Framework (LDF). The LDF consists of a suite of Local Development Documents (LDD's); both statutory (Development Plan Documents or DPD's), such as the proposed 'Taunton Town Centre Area Action Plan', and non statutory (Supplementary Planning Documents or SPD's), such as the proposed SPD to assist in the interpretation and implementation of the policies and objectives of the Town Centre Area Action Plan.
- 3.3** Local Development Frameworks are intended to streamline the local planning process and promote a proactive, positive approach to managing development. One of the key aims of the system is 'Programme Management' through the preparation of a range of local development documents in accordance with the Local Development Scheme. The LDS provides a timetable for the preparation of the

Council's LDD's, focussing on the first three years until March/April 2008, identifying priorities, key milestones and resources required to prepare the LDD's. These 'milestones' such as 'public consultation/participation on proposed options and proposals' are set out for each proposed LDD in Appendix 3 and 4 of the LDS submission attached.

4. PROCEDURE

4.1 The 2004 Act requires that the LDS be submitted to the Secretary of State (GOSW) within six months of commencement of the Act (i.e. by 28 March 2005). It will not be subject to independent examination nor published for the public to make formal comment. However, Officers have sought to ensure that the preparation of the LDS is both realistic in terms of timescales, priorities, resources and content through ongoing consultation with the Government Office (GOSW). GOSW are liaising with the Planning Inspectorate (PINS) on behalf of all the Somerset District Councils to ensure the Inspectorate can accommodate the proposed timetables set out in various LDS's. Any further comments on the LDS from GOSW will be reported verbally with this Agenda item. Although not published for formal public comment, the LDS was also taken to the Local Strategic Planning (LSP) Working Group for consideration of its content and relationship with Community Strategy Initiatives. Any proposed changes identified by the LSP Working Group will be reported verbally.

4.2 The LDS is brought into effect four weeks after being submitted to the Secretary of State unless the Minister intervenes during this period, or requests more time. After this the Council must make a copy available for inspection at Deane House and publish a copy on the Planning website.

5. CORPORATE PRIORITIES

5.1 The Local Development Scheme (LDS) sets out the programme and priorities for preparing the Council's Local Development Framework (LDF). The LDF is the means by which the land use / spatial elements of the Community Strategy and the Vision for Taunton will be delivered and will assist in delivering all of the corporate priorities.

6. RECOMMENDATION

6.1 The Executive is requested to approve the Local Development Scheme and that it is formally submitted to the Secretary of State (represented by The Government Office for the South West) for consideration and approval.

Background Papers

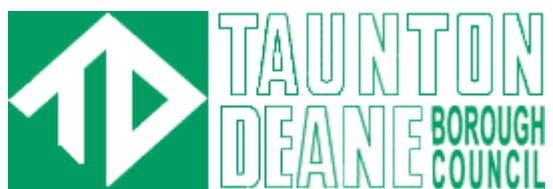
SPTED 18 November 2004. "Linking the Local Development Framework to the Community Strategy".

SPTED 15 February 2005. "The Local Development Framework: The Local Development Scheme".

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TAUNTON DEANE BOROUGH COUNCIL

LOCAL DEVELOPMENT SCHEME

February 2005

TAUNTON DEANE BOROUGH COUNCIL

LOCAL DEVELOPMENT SCHEME

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APPENDICES

Appendix 1 List of Abbreviations used in this document

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TAUNTON DEANE BOROUGH COUNCIL LOCAL DEVELOPMENT SCHEME (LDS)

1. Introduction

- 1.1** This is the Taunton Deane Borough Council's first local Development Scheme (**LDS**). The LDS is a three year rolling management plan for the preparation of planning policy documents referred to as Local Development Documents (**LDD's**) that will direct future planning decisions in the Borough.
- 1.2** The LDS will be reviewed and rolled forward on an annual basis to take account of progress on the programme and monitoring of the evidence base and adopted policies. This LDS was submitted to the Government Office in March 2005 and covers the period to March 2008.
- 1.3** The LDS contains a number of abbreviations. For convenience, Appendix 1 of this document provides a brief definition of each abbreviation used.

2. Local Development Framework

- 2.1** The Local Development Framework (LDF) is the name given for the portfolio of LDD's together with the Statement of Community Involvement (SCI), the LDS and Annual Monitoring Reports. There are two types of LDD's.
 - **Development Plan Documents (DPD's)** These have been subject to independent testing or examination and have the weight of development plan status in determining planning applications;
 - **Supplementary Planning Documents (SPD's)** These do not have development plan status but must undergo rigorous community involvement. SPD's elaborate on policies and proposals in the DPD and are a 'material consideration' in determining applications for planning permission.
- 2.2** The Development Plan Documents, together with the Regional Spatial Strategy for the South West (prepared by the Regional Assembly) will form the statutory development plan for the Borough of Taunton Deane.
- 2.3** This new approach to planning was introduced by the Government under the Planning and Compulsory Purchase Act 2004. Through the LDF the new system is intended to streamline the local planning process, provide greater flexibility and a quicker response to changes in local circumstances. The LDF will deliver a strategic approach to spatial planning, delivering sustainable development and reflecting the aspirations of the local communities. In its completed form the LDF will set out where future residential, retail, employment, community and other uses will be located within the Borough and how their delivery will be secured.

- 2.4 The LDF will be a key component in the delivery of the Taunton Deane Community Strategy, setting out those elements of the strategy that relate to the development and use of land. The LDF preparation will therefore involve close collaboration with local communities and other stakeholders, within both the private and public sectors, to ensure the adopted approach is both inclusive and integrated with other strategies and programmes. The process of engaging all communities is set out in the Statement of Community Involvement (**SCI**).
- 2.5 The LDF is therefore important for all residents and businesses in Taunton Deane as its production will be strongly influenced by the community. In its completed form the LDF will set out where and how these proposals will be delivered over the Plan period to 2021.
- 2.6 The Borough Council will need to prepare a number of DPD's. The order in which they are prepared will reflect the priorities emerging through other plans and strategies with which that DPD interrelates and in particular, implementation of 'The Taunton Vision'. The highest priorities will be given to the Core Strategy and Area Action Plans:
- **Core Strategy:** This DPD sets out the vision for the authority and the, strategic objectives, spatial strategy and primary policies for meeting that vision, reflecting the policies and objectives set out in the emerging Regional Spatial Strategy for the South West and where appropriate the strategic objectives of the 'Community Strategy'. For example it will specify how much growth should be accommodated within the Borough and where it should be located, together with areas where development should be particularly constrained for environmental and other reasons. The Core Strategy is a priority for preparation since all other DPD's will be required to conform to it.
 - **Area Action Plans:** Two AAP's are proposed; one for the town centre and one for an urban extension(s) to the built up area of Taunton. These Plans will provide the framework for delivering the bulk of the Boroughs growth requirements to the period 2021, which are identified in the emerging Regional Spatial Strategy. Both AAP's will build on work prepared for the 'Taunton Vision', in particular detailed work under the Urban Design Framework (UDF) for the town centre which will focus on the regeneration of underused brownfield sites to enable the centre to fully realise its potential as a sub-regional centre and is therefore considered a priority for production in parallel with the Core Strategy. Where possible, the AAP's will also identify opportunities to compare, link and merge community strategy action plans to deliver and maximise benefits for local communities.
 - **Site Allocations:** This DPD will identify specific areas of land for particular uses or a mix of uses, such as employment and housing land, to ensure 'needs' identified in the Regional Spatial Strategy and other local documents such as the Council's Housing Strategy, but which cannot be accommodated within the town centre or urban extension AAP's, are met.

- **Policies for the Control of Development;** This DPD will set out a range of policies applicable across the Borough to ensure that development proposals meet the authority's vision and Core Strategy. For example, it is likely to include policy approaches to proposed housing development in the countryside or restrictions on the type of goods sold in out of centre retail stores.
- **Proposals Map:** This will illustrate on an ordnance survey map the policies in the development plan (ie all the development plan documents which are contained in the local development framework).
- **Saved Plans:** The recently adopted Taunton Deane Local Plan (November 2004) is "saved" for three years, until November 2007 and will be part of the Development Plan until then. However parts may be superseded by other LDD's before then and with the agreement of the Secretary of State, other parts may be 'saved' beyond three years (see paragraph 4.2). Appendix 2 indicates the DPD that is proposed to replace each of the existing Local Plan policies.

2.7 The Act also requires yearly monitoring of the progress made on the implementation of LDD's and the extent to which their policies are being achieved. This is explained in more detail in section 14 of this LDS

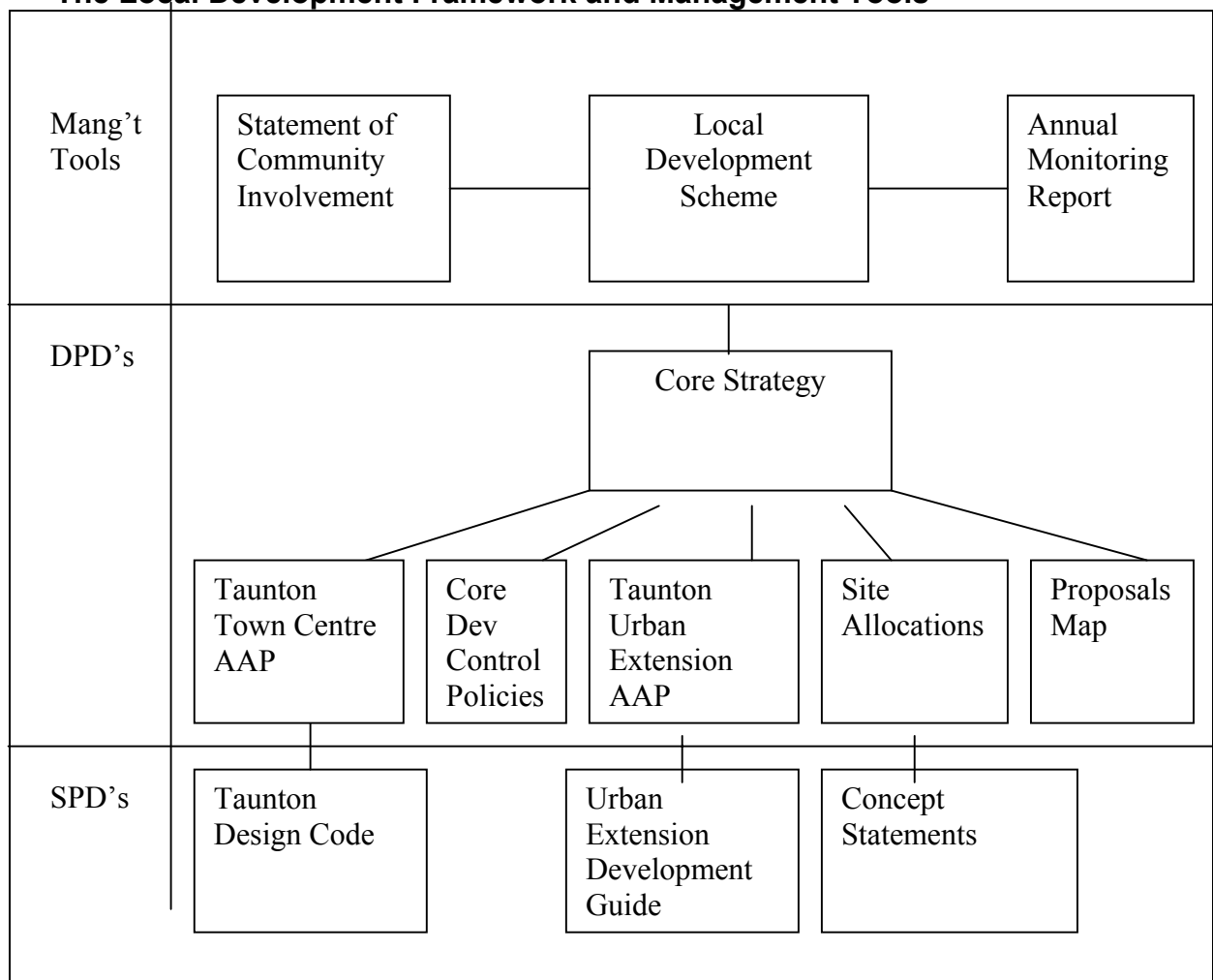
3. **Statement of Community Involvement**

3.1 The Statement of Community Involvement (**SCI**) is a further important document that is included within the LDF folder. The SCI performs an integral role in the preparation of the LDF, setting out the Councils approach for involving interested parties in preparing and revising Local Development Documents (LDD's) and for consulting on planning applications. The SCI will be subject to independent examination by an Inspector. Further information on the SCI is set out in greater detail in Appendix 3.

4. **The LDF Folder**

4.1 *Figure 1* below identifies how the 'suite' of documents provides the framework for the spatial planning of the area. Appendix 4 explains the role and timetable for preparation of each LDD in greater detail. Appendix 5 sets out the programme for the preparation of LDD's in the form of a Gant chart to enable the timescale of the LDF process to be assessed as a whole.

**Figure 1.
The Local Development Framework and Management Tools**



4. Transitional Arrangements

4.1 The Government has made special arrangements for moving from the old development plan system to the new one.

Saved Plans

4.2 The adopted Taunton Deane Local Plan prepared under the 1990 Town and Country Planning Act is automatically “saved” for three years from November 2004 (the date the Plan was adopted), or until parts of

it are replaced within those three years by DPD's prepared under the new system. However, provision exists to "save" parts of the adopted local Plan beyond the three year period. Due to the priority afforded to certain DPD's and staff resources it is anticipated that a number of policies will be saved beyond three years, subject to the Secretary of State's approval. Appendix 2 provides details of which existing Local Plan policy will be integrated into which DPD.

Supplementary Planning Guidance

- 4.3** Under the previous planning system, Supplementary Planning Guidance (SPG) was often prepared by the Council to assist in the interpretation and implementation of development plan policies. The 2004 Act makes no provision to "save" existing SPG within the new system. However, SPG does maintain its status as a non statutory material consideration in determining applications for planning permission. The Borough Council has prepared a range of SPG over the past few years, some now more relevant than others. Appendix 6 sets out the Councils existing SPG and specifies what function they will retain within the new system.

5. Links with other strategies and plans

- 5.1** The Boroughs future role and function is determined from 'above' by other public bodies, such as the Regional Assembly, and 'below' by the local communities and businesses within the Deane. The future plans of Taunton Deane and thus the preparation of the LDF, cannot be undertaken in isolation. The new planning system explicitly recognises that all LDD's will need to be informed by and in conformity with, a number of other internal and external Plans and Strategies. The following are particularly relevant in the preparation of the LDF.

- 5.2** Somerset and Exmoor National Park Structure Plan: The Structure Plan sets out the spatial planning policies for all of the Somerset Districts, for example specifying how much new housing is required within the County, and Taunton Deane between 1991-2011. The actual locations for this required level of housing were set out in the Taunton Deane Local Plan, adopted in 2004. The existing role and function of the Structure Plan will cease upon publication of the Regional Spatial Strategy although the number of houses already built and committed within the Deane will need to be incorporated into the LDF.

- 5.3** Regional Spatial Strategy: Prepared by the Regional Assembly, the first draft of the Regional Spatial Strategy for the South West 2006-2026 (RSS) is anticipated later in 2005. This spatial planning document, which also incorporates the Regional Transport Strategy, will provide the framework for development right across the region, identifying foci for future residential and employment growth, including Principal Urban Areas (PUA's), for which Taunton is currently designated. The opportunities and restrictions for growth within the RSS are being progressed through the Taunton Sub Area Study (TSAS), which will be progressed in liaison with local service providers (such as the health

authority), and widespread public consultation. As the RSS will form part of the Councils Development Plan the Councils other LDD's (such as the Core Strategy and Area Action Plans) will need to be in close 'conformity'.

- 5.4** Minerals and Waste Development Schemes: Although Taunton Deane is responsible for operating most of the new planning system within the Borough, responsibility for minerals and waste planning falls under the remit of the Somerset County Council.
- 5.5** Local Transport Plan: Prepared by Somerset County Council as the Local Transport Authority, in consultation with the District and Borough Council's. The LTP sets out the transportation objectives, policies and spending plans in Somerset for the next five years subject to a successful funding bid to central government. The LTP should therefore identify where major spending on transportation will be required in support of the RSS and LDF. Thus for example, proposals such as the "Third Way" (inner relief road), the Northern Inner Distributor Road (NIDR), the relocation of Taunton bus station and improved integration of bus and rail services are all important objectives raised through the Taunton Transport Strategy Review and fed into the LTP. These issues will in turn require to be cross-referenced into the relevant LDD's (for example the Town centre Area Action Plan) as part of the delivery process.
- 5.6** Consultation on LTP 2 is proposed for spring 2005.
- 5.7** Taunton Deane Community Strategy: 'Our Place, Our Future, A Community Strategy for Taunton Deane' 2003-2005 has been produced by Taunton Deane Local Strategic Partnership (LSP). The LSP is a partnership of the key public, private and voluntary organisations in Taunton Deane. The Community Strategy was developed through consulting key organisations who provide services in the Deane, consulting local residents and taking into account key environmental, social and economic trends. The overall aim of the Community strategy is to improve the quality of life for people and communities in Taunton Deane now and into the future.
- 5.8** The Community Strategy is particularly integral to the LDF process (and will be fully explored within the SCI) as each of the development plan documents (DPD's) will seek to assist the delivery of the Strategy's six priorities: Economy, Transport and Access, Crime, Health, Environment and Delivery (ETCHED) as they relate to land use planning. For example, the Strategy's objective of improving the Deanes' rural communities can be addressed through identifying sustainable opportunities for employment diversification and sites for new investment and job creation.
- 5.9** Taunton Vision (2002): The Vision builds on early preparatory work in the Community Strategy, setting out a range of objectives and projects

aimed at enhancing the strategic role of Taunton as a distinct commercial, cultural and service centre for the central part of the south west region over the next 20 years. Subsequently the Urban Design Framework (UDF) and Urban Extension Study (UES) developed these proposals further identifying sites suitable for accommodating this growth. These documents, together with others identified in the individual LDD profiles in Appendix 4 will perform a vital role informing the preparation of Area Action Plans for the town centre and urban extension which will deliver the aspirations identified within 'The Vision'.

5.10 Taunton Deane Borough Council Corporate Strategy: The Corporate Strategy is a three year rolling plan setting down the strategic direction of the Council. It is directly linked to the themes within the Community Strategy, demonstrating how the Council is contributing towards and delivering priorities set out in the Community Strategy (see ETCHED in 5.8 above). There are four priority areas:

*Economy - delivering the Vision for Taunton;

*Transport - working with partners to tackle local transport priorities;

*Crime -tackling Anti-Social Behaviour in our communities;

*Health - more affordable housing and reducing homelessness.

5.11 The Corporate Strategy determines the allocation of Council resources in service areas and these priorities are 'tested' through public consultation. These priorities will in turn be reflected in the timetabling for prioritising the preparation of the DPD programme. Thus, for example housing priorities will be addressed in the 'Housing Strategy', which will in turn be reflected in the preparation of DPD's such as the 'Core Strategy' (eg the requirement for affordable housing) and the 'Allocations' DPD (eg identification of sites to meet the growth needs of Wellington).

5.12 Other Council Strategies and Plans: In addition to the above, the Council prepares a number of targeted plans and strategies aimed at securing its corporate aims and objectives and as a tool for securing additional resources from outside. The LDF will play a key role in the implementation of documents such as the Borough Council's Housing Strategy, Parks and Open Space Strategy, Playing Pitch Strategy, Cultural Plan, Nature Conservation Strategy, Biodiversity Action Plan, Tourism and Economic Development Strategies.

6. Programme Preparation

6.1 Although there will be a number of DPD's produced covering various subject areas, the process will be fairly consistent throughout. There are four main stages of production:

Pre Production Stage:

- Gathering of evidence and survey material to provide a sound understanding of local issues and needs.

Production Stage:

- Issues and options developed through informal discussion with local communities and stakeholders such as the Local Strategic Partnership and Parish Councils.
- A preferred options report together with an initial Sustainability Appraisal.
- Formal (pre submission) public consultation in line with the SCI. This stage is considered as a 'milestone'.
- Consider representations from consultation and prepare changes for final DPD and Sustainability Appraisal.
- Submit DPD and Sustainability Appraisal to Secretary of State. This stage is considered a 'milestone'.

Examination:

- Public consultation on submitted DPD
- Pre examination consideration of representations of support and objection.
- Inspectors examination into 'soundness' of the plan.

Adoption:

- Receipt of Inspectors binding report.
- Report prepared for Council.
- Adoption of DPD and incorporate into LDF. This is the final 'milestone' event.

6.2 The Gant chart attached as Appendix 5 sets out the timetable for DPD production and the timing of the key 'milestones'. At this stage, assumptions have had to be made about the exact availability of the Planning Inspectorate (PINS) to hold the examinations but arrangements can be firmed up through the year and adjustments made when the LDS is next reviewed.

7. Management and Responsibilities

7.1 The Schedules in Appendix 4 (Profiles of each LDD) identify management responsibilities for each area of work. Key contacts are:

- The Executive Portfolio holder for Planning Policy and Transportation will have responsibility for overseeing the process of the Statement of Community Involvement (SCI) and DPD preparation.
- Head of Policy and Performance (stakeholder and community engagement, links to community strategy, auditing of processes);
- Head of Development (Programme Review);
- Forward Plan Manager (day to day programme, staff and resource management).

7.2 For each DPD and the SCI, the levels of political responsibility are as follows:

- The Borough Council's Strategic Planning, Transportation and Economic Development (SPTED) Review Panel will meet and consider

issues as and when different stages of DPD preparation has been reached, ensuring that Members are fully involved and informed in the process. SPTED has no decision-making powers.

- An Executive decision will be required for all pre submission stages.
- Review Board oversees decisions of Executive and have the opportunity to 'call in' decisions.
- Full Council resolution would be required for submission and adoption stages.

7.3 The LSP has created a Spatial Planning Working Group to develop the linkages between the community strategy and future proposed land use / spatial planning documents. Membership will be kept under close review to ensure relevance to priorities. The group currently consists of a member from the LSP core membership, one representative from each of the (3) area based partnerships, one representative from the Community Council and the Council's Corporate Projects Officer.

7.4 Weekly meetings are held between the Head of Development and the Forward Plan manager and weekly between the Head of Development and other Departmental Heads (Core Management Team), to ensure all lines of communication are working and to review progress.

7.5 All officers engaged in the process are linked by e:mail and shared work directories to facilitate joint working. Fortnightly meetings are held to review progress.

7.6 The Chief Executive will take personal responsibility for ensuring that the annual monitoring report is produced on time and that the information is fed into the annual review of the LDS.

8. Resources

8.1 The Forward Plan Team will be responsible for the preparation of Local Development Documents. The following staff resources will be available to do the work:

Head of Development	20%
Forward Plan Manager	60%
Principal Planner	50%
1 x Senior Planner	80%
1 x Senior Planner	50%
1 x temp Planner	80%
1 x Planning Assistant	80%
1 x Information Officer	50%
1 x 0.6 FTE Technician	50%

8.2 The Planning Delivery Grant (PDG) has enabled provision to be made to engage consultants on specific projects such as the Urban and Retail Capacity studies where there is a lack of expertise or capacity in house. These studies will be undertaken in year 1 to provide background information in the formulation of the Core Strategy and Town Centre Area Action Plan.

8.3 The Urban Design Framework and Urban Extension Study have been funded by the Council through its Taunton Vision budget on a partnership basis with the RDA and Somerset County Council. These studies will be used to inform the preparation of the Town Centre and Urban Extension Area Action Plans.

8.4 The 2004/05 Budget and Planning Delivery grant has made full provision to cover the first year's programme.

9. Risk Assessment

9.1 In preparing the Local Development Scheme, the Council has identified a number of areas of risk and has given consideration as to how they can be eliminated, mitigated, minimised or accepted:

- **Staff Turnover:** Traditionally, the Forward Plan section has had a low turnover of staff. This may well be due to efforts to provide a good working environment, variety in workload and fair remuneration for the work undertaken. However, due to the small size of the section, any loss of staff numbers would have severe consequences in the preparation of the LDD's and other core functions of the team.
- **Financial Resources:** The Council has recently undergone a budgetary review process, assessing service provision in relation to the meeting of corporate priorities. Whilst some services have been cut, the Forward Plan Unit has been identified as a 'Priority Service'.
- **Soundness of DPD's:** Risk will be minimised by continuing the close working relationship and meetings with GOSW throughout the process to ensure that all documents are soundly based.
- **Capacity of Planning Inspectorate (PINS) and other external bodies:** This is largely out of the Borough Councils hands although all such bodies will be informed well in advance of their services being required.
- **Legal challenge:** This will be minimised by ensuring that the DPD's are soundly based, using robust evidence, working in cooperation to seek resolution of problems through other means and with well audited stakeholder and community engagement systems.
- **Programme Slippage:** In liaison with the Government Office for the South West, the Council has sought to minimise risk of slippage by ensuring that this LDS is realistic in its programme of delivery, taking into account availability of resources, other anticipated commitments and required information from other stakeholders. However, an element of 'slack' has been included into the later part of the programme for contingency.

10. Joint working

10.1 The Council has been fully supportive of joint working with other Somerset Districts, the County Council, the Regional Planning Body and GOSW in the early stages of preparing the Local Development Framework, including bi-monthly meetings to progress similar working practices and approaches towards preparing the LDS.

10.2 It is not proposed to prepare any joint DPD's requiring adoption with adjoining districts. However, joint working towards developing a compatible set of 'generic' development control policies across the Somerset districts and joint working on information gathering for future proposed SPD's such as 'Affordable Housing' is proposed.

11. The Evidence Base

11.1 The Borough Council developed a sound evidence base that was rigorously tested in the preparation of the recently adopted Boroughwide Local Plan. This has been supplemented by ongoing monitoring and other project work which will provide an effective base upon which to build the Council's strategy and policies.

11.2 As part of the continued updating of evidence, the following technical studies will inform the preparation of the LDD's within the current LDS:

- Urban Capacity Study (2005);
- Housing Needs and Market Assessment Update (2005);
- Retail Capacity Study (2005);
- Employment Land supply and demand Update (2005);
- Housing, Employment and Retail yearly Monitoring reports;
- Taunton Urban Design Framework (2004);
- Taunton Design Code (2004);
- Taunton Urban Extension Study (2004).

12. Sustainability Appraisal and Strategic Environmental Assessment

12.1 In order to fully comply with Regulations, secure efficient working and provide a robust and transparent evidence base, a Sustainability Appraisal (SA) meeting the requirements of the Strategic Environmental Assessment Directive (SEA) will be embedded into production of LDD's at the very start of preparation and updated at each milestone stage (Options, Preferred Option/Draft Policies, Submission and Adoption). The Council view this process as a positive tool for developing a full range of policies working to secure the sustainable development of the Borough within the Plan period, whilst setting a baseline from which to plan future needs beyond 2021.

13. Supporting Documents and Statements

13.1 A number of supporting documents and statements will be required to accompany each LDD in order to demonstrate that its preparation:

- Conforms with the Regional Spatial Strategy;
- Was undertaken in parallel with a Sustainability Appraisal, meeting government guidance;
- Is in accordance with the agreed requirements and procedures of the Statement of Community Involvement;

- Specifies the relationship between it and the Structure Plan, Taunton Deane Local Plan and the extent to which it replaces specific sections and/or policies;
- Reflects the evidence gathered in the supporting documents relevant to that LDD topic.

14. Monitoring and review

14.1 Following its adoption, the Taunton Deane Local Development Scheme (LDS) will be monitored on an annual basis from 1st January 2006. The Annual Monitoring Report (AMR) will assess the implementation of the LDS and the extent to which policies in the LDD's are being achieved. Each year a report will be submitted to the Councils Executive and subsequently GOSW, that will include an assessment of:

- Whether the Authority is meeting, or is on track to meet, the targets it has set itself in its LDD's and if not, the reasons why;
- What impact the Authority's policies are having on other targets set at national, regional and local level;
- Whether the Authority needs to replace any policies in order to meet their sustainable development objectives; and
- What action needs to be taken if policies need to be replaced.

14.2 The AMR will be available to view on the Council's website and will be used to determine whether there is a need to amend the LDS.

TAUNTON DEANE BOROUGH COUNCIL

LOCAL DEVELOPMENT SCHEME

APPENDICES

APPENDIX 1

ABBREVIATIONS USED IN THIS DOCUMENT

DPD: Development Plan Document. Spatial planning documents that are subject to independent examination, and together with the Regional Spatial Strategy, will form the development plan for a local authority area. They can include a core strategy, Area Action Plans etc.

LDD: Local Development Document. The collective term for Development Plan Documents, Supplementary Planning Documents and the Statement of Community Involvement.

LDF: Local Development Framework. The name for the portfolio of Local Development Documents. It consists of Development Plan Documents, Supplementary Planning Documents, Statement of Community Involvement, the Local Development Scheme and Annual Monitoring Reports.

LDS: Local Development Scheme. Sets out the programme for preparing Local Development Documents.

LSP: Local Strategic Partnership. Partners of stakeholders (often public, private, community and voluntary sectors) who develop ways of involving local people in shaping the future of their neighbourhood in how services are provided..

PDG: Planning Delivery Grant. A funding mechanism of central government issued to local planning authorities who achieve specified delivery and other targets.

RDA: (South West) Regional Development Agency. A Government Agency charged with promoting sustainable economic development, prosperity and productivity in the regions.

RSS: Regional Spatial Strategy. Sets out the region's policies in relation to development and use of land and forms part of the development plan for local planning authorities.

SA: Sustainability Appraisal. Tool for appraising policies to ensure they reflect sustainable development objectives (ie social, economic and environmental factors) and required to be undertaken for all development plan documents.

SEA: Strategic Environmental Assessment. A generic term used to describe environmental assessment as applied to policies, plans and programmes.

SCI: Statement of Community Involvement. Sets out the standards which authorities will achieve with regard to involving local communities in the preparation of local development documents and development control decisions.

SPTED: Strategic Planning, Transportation and Economic Development Review Panel: A Panel of Borough Councillors with the task of considering relevant issues and recommending action for the Planning Policy and Transportation Portfolio holder to take to Executive.

SPG: Supplementary Planning Guidance. Document used to supplement plan policies and proposals. It has no statutory basis and is not subject to independent examination but can be considered as a 'material consideration' in planning decisions.

SPD: Supplementary Planning Document. As SPG but follows a more rigorous process to adoption, including a more defined role of community engagement.

APPENDIX 2

THE STATUS OF POLICIES DURING THE TRANSITION FROM LOCAL PLAN TO DEVELOPMENT PLAN DOCUMENTS.

The following table indicates how the policies in the adopted Taunton Deane Local Plan will be replaced or merged with the relevant Development Plan Documents. Some existing policies may well become redundant prior to inclusion in the DPD preparation but have been included below at this stage. Likewise, additional policies will also be required within the DPD's that are not currently within the adopted Local Plan . At this stage these cannot be indicated. The policies proposed to fall within the "Allocations" and "Development Control" DPD's will be "saved" beyond the three year transitional period, in accordance with the 2004 Act/Regulations since these documents are not anticipated for adoption prior to 2008.

Development Plan Document	Content	Policies of the adopted Local Plan that will be replaced or merged with the Development Plan document
Core Strategy	Strategic document setting out the vision, spatial objectives and strategy for meeting known and anticipated development requirements to 2016.	S2 Design S3 Mixed Use Developments S4 Rural Centres S5 Villages S7 Outside Settlements S8 Best & Most Versatile Agricultural Land H9 Affordable housing within general market housing EC1 Employment development EC9 Loss of employment land EC10 Accessibility of new development EC12 Major proposals for key town centre uses EN1 Wildlife sites of international importance EN2 Sites of Special scientific interest EN3 Local wildlife and geological interests EN28 Development and flood risk T1 Associated settlements T26 Development preventing the achievement of transport policies W1 Definition of extent of Wellington
Town Centre Area Action Plan	Focuses on the regeneration and redevelopment opportunities in Taunton town centre to accommodate residential, employment, retail, leisure and other activities to enable the potential of the centre as a sub-regional focus to be met.	S9 Taunton town centre H6 Town centre housing T2 Tangier T3 Firepool T22 Diversity in the town centre T23 The Crescent T24 Wood Street T30 Walking encouragement within the restricted access cordon T31 Pedestrian priority measures within the town centre

		T32 (point a) Inner relief road
Urban Extension Area Action Plan	The identification of a major development site(s) required to make a major contribution towards the residential and employment requirements within the Borough to 2016.	
Generic Development Control Policies	To provide the policy framework for consistent development control decision making across the Borough	H2 Housing within classified settlements H3 Residential conversions in the town centre H4 Self contained accommodation H5 Non self contained accommodation H7 Conversion of rural buildings H8 Replacement of dwellings outside settlements H11 Rural local needs housing H12 Agricultural or forestry workers H13 Occupancy conditions H14 Gypsy and Traveller sites H15 Travelling show people H16 Residential care homes H17 Extensions to dwellings H18 Ancillary accommodation H19 Designing out crime EC2 Expansion of existing firms on land subject to restrictive policies EC3 Extension of existing employment sites EC4 Working from home EC6 Conversion of rural buildings EC7 Rural employment proposals EC8 Farm diversification EC11 Local service provision

		<p> EC13 Restrictions on Unit size and range EC14 Modernisation of Floorspace EC15 Assoc Settlements/Rural Centres/Villages EC16 New and altered shop fronts EC17 Shop Front Security EC18 Upper Floors of Shops EC19 Farm Shops EC20 Garden Centres EC21 Tourist and Recreational Dev EC23 Tourist Accommodation EC24 Caravans & Holiday Chalets EC25 Touring Caravan and Camping Sites EC26 Outdoor Advertisements and Signs M1 Non-residential developments M2 Non-Residential Car Parking outside Taunton & Wellington M3 Non-Residential development and transport provision M4 Residential Parking Provision M5 Cycling M6 Traffic Calming C1 Education Provision for New Housing C3 Protection of Recreational Open Space C4 Standards of Provision C5 Sport Facilities C6 Public Rights of Way C7 Blackdown Hills Ridge Route C8 Developments Affecting Disused Railway Tracks and Canals C9 Horse Riding and riding Establishments C10 Golf C11 Power Lines C12 Renewable Energy </p>
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		<p>C13 Wind Turbines C14 Large Telecommunications Masts C15 Satellite Antennae C16 Utility Developments EN4 Wildlife in buildings to be converted or demolished EN5 Protected Species EN6 Protection of Trees, Woodlands... EN7 Ancient Woodlands EN8 Trees in and around settlements EN9 Tree Planting EN10 Areas of Outstanding Natural Beauty EN11 Special Landscape Features EN12 Landscape Character Areas EN13 Green Wedge EN14 Conservation Areas EN15 Demolition affecting Conservation Areas EN16 Listed Buildings EN17 Changes to Listed Buildings EN18 Demolition of Listed Buildings EN19 Recording of Listed Buildings EN20 Parks and Gardens of Special Historic Interest EN21 Nationally important archaeological remains EN22 Development Affecting Sites of County Archaeological Importance EN23 Areas of High Archaeological Potential EN24 ARUs now UOS EN25 The Water Environment EN26 Water Resources EN27 Water Source Protection Areas and Public water Supply Source Protection Areas EN29 Flooding due to Development</p>
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		<p>EN30 Hazardous Substances EN31 Development near to sites where hazardous substances are used EN32 Contaminated Land EN33 Building Waste EN34 Control of External Lighting T19 Primary shopping area: Taunton T20 Restrictions on change of use from food and drink establishments T21 Secondary shopping areas: Taunton T25 Vitality and viability of defined local shopping centres T34 Approach routes into Taunton W7 Primary shopping area W8 Restrictions on change of use from A3 W9 Secondary shopping areas W10 Complementary uses in the town centre W12 Office development: Wellington W13 Retention of burgage patterns W14 Landscape setting of approach routes BL2 New housing development: infill BL3 Open areas to be protected BL4 Areas of environmental importance CO2 New housing development: Infill CM2 New housing development: infill HB2 Protection of views to Neroche View KM2 New housing development: infill OK2 New housing development: infill WV2 New housing development: infill WV4 Retail facilities: Wiveliscombe</p>
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<p>Allocations</p>	<p>Identifies specific sites for a range of residential, employment and other development opportunities within the Borough to meet requirements to 2016 not previously identified through the Town Centre and Urban Extension Area Action Plans.</p>	<p>H1 Phasing strategy H10 Affordable housing: indicative targets EC5 Culmhead EC22 Land W of Bishops Lydeard Station C2 Reserved School Sites T4 Norton Fitzwarren major development site T5 Norton Fitzwarren: housing allocations T6 Norton Fitzwarren: employment allocations T7 Norton Fitzwarren: community uses T8 Monkton Heathfield major development site T9 Monkton Heathfield: mixed use area T10 Monkton Heathfield: Aginghills residential allocation T11 Monkton Heathfield: Langaller employment allocation T12 Monkton Heathfield: educational site T13 East of Silk Mills Lane: residential allocation T14 Priorswood Road: mixed use site T15 Small residential allocations T16 East of Crown Estate: employment allocation T17 South of Priorswood Concrete works: employment allocation T18 Courtlands Farm: employment allocation T27 Bus facilities provision T28 Park and ride sites T29 Bus services from new developments: Monkton Heathfield and Norton Fitzwarren T35 Ladymead sports centre T36 Blackbrook recreational open space T37 Priorswood landfill site T38 Maidenbrook playing field allocation W2 Tonedale Mill W3 Cades Farm (new policy)</p>
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		<p>W4 Chelston House Farm W5 Chelston Business Park W6 Milverton Road/Lowmoor Ind. Est. W11 Town centre uses W15 Sewage treatment works BL1 Gore Farm: Housing CO1 Corfe Farm: Housing CM1 Hyde Lane: Housing HB1 Station Road: Housing HE1 Henlade: employment KM1 Hill Farm: housing TV1 Cotford housing capacity WV1 Style Road: housing WV3 Taunton Road: employment</p>
Proposals Map	The identification on an Ordnance Survey base of sites, designations and other areas to which specific policies and proposals are made within other DPD's.	

APPENDIX 3

STATEMENT OF COMMUNITY INVOLVEMENT

The Statement of Community Involvement (SCI) is an important document published within the Framework folder and will be prepared in line with the following approach:

Overview

Role and Subject Sets out standards and the approach to involving stakeholders and the community in the production of all LDD's and major planning applications. It is the Council's service level agreement with the community and stakeholders. This has top priority so work has already commenced to engage with the Local Strategic Partnership, stakeholders and the wider community to ascertain how they wish to be involved in the different parts of the process for preparing each type of document. The SCI will forge the linkages with the Community Strategy and community planning processes, enabling the LDF to address locally based issues and expectations. Pre submission consultation will take place in spring 2005 followed by pre submission public participation during the late summer 2005. Submission will occur during late autumn 2005.

Coverage Borough wide and involving organisations external to the Borough

Status Non Development Plan Local Development Document

Conformity Must at least meet the minimum requirements in the regulations and will have regard to the Council's Corporate Communications Strategy (2004).

Timetable

Stage

Completion of pre-production / survey / early engagement:	Mar 2005
Pre submission consultation:	May 2005
Pre submission public participation:	Oct 2005
Submission to Secretary of State:	Feb 2006
Pre Examination Meeting:	May 2006
Examination:	Jul 2006
Receipt of Inspectors Report	Oct 2006
Adoption:	Jan 2007

Arrangement for Production

Organisational Lead: Head of Development

Political Management: Chief Executive, informed by Strategic Planning, Transportation and Economic Development Panel

Internal Resources:

Forward Plan Unit, Economic Development Unit, Policy and Performance Unit

External Resources:

Stakeholder Resources:

Local Strategic Partnership (LSP) to provide key link to community planning processes.

Community and stakeholder involvement:

Early stakeholder and community engagements and consultation on pre submission proposals.

APPENDIX 4

PROFILES OF EACH LOCAL DEVELOPMENT DOCUMENT

The Taunton Deane Local Plan.

Overview

Role and Subject. This was prepared under the previous planning legislation, being adopted in November 2004 with an end date of March 2011. Under the new planning system it is necessary to replace this development plan as a priority, with a number of Local Development Documents in order to keep it up to date. Under regulations the existing plan will be saved for a period of 3 years to December 2007 whilst remaining DPD's are put in place to replace it. As each development plan document is adopted, the relevant policies and proposals in the adopted local plan that it replaces will be withdrawn. Any existing policy not being replaced within this timeframe will have to have the express consent of the ODPM to remain as a "saved policy".

Coverage Borough wide

Status Adopted Development Plan Document

Conformity With the adopted Somerset and Exmoor National Park Joint Structure Plan Review 1991-2011

Timetable and Arrangements for Production Not applicable.

Core Strategy Development Plan Document

Overview

Role and Subject. Strategic document setting out the vision, spatial objectives and spatial strategy (backed by a key diagram) for meeting known and anticipated development requirements to 2021.

It will contain the area specific vision for the Borough, measurable objectives (linked to ongoing monitoring arrangements) and a set of core policies required to direct and deliver growth in a sustainable manner. It will deliver a broad framework for sustainable growth within the Borough through a range of objectives and policies such as the identification of the broad areas where development will be focussed (which will be followed through to delivery in the relevant Area Action Plans) and areas of conservation and development restraint. Policies will identify the role and function of Taunton PUA, including the anticipated housing and employment requirements and the growth needs for the identified settlement hierarchy below, including Wellington. Policies will provide guidance covering accessibility and locations for major travel generators, to provide the delivery mechanisms for affordable housing needs and other developer contributions, mixed use developments and associated infrastructure provision, urban and rural regeneration and environmental enhancement and conservation.

It will be prepared to be in conformity with RPG and emerging RSS which itself will be informed by work on the Taunton Sub area study. The Core Strategy will have regard to the Community Strategy and the saved Local Plan in so far as those are compatible with RPG/RSS. It is a priority because all other LDD's must be in conformity with the Core Strategy.

Coverage. Borough wide

Status. Development Plan Document

Conformity. Externally, general conformity with the emerging Regional Spatial Strategy, County Structure and Local Transport Plans. Internally, with the Council's Corporate Strategy, Community Strategy, Housing Strategy and Taunton Visioning work.

Timetable

Pre-production / survey / consultancy phase :	Apr05- Aug05
Period of preparation, including early stakeholder and Community engagement and consultation on issues and options:	Sep05- Feb06
Pre-submission consultation on preferred options and proposals:	Mar 06
Submission to the Secretary of State:	Sep 06
Pre Examination Meeting	Feb 07
Examination:	May 07

Receipt of Inspectors binding Report
Estimated date for adoption:

Sep 07
Jan 08

Arrangements for Production

Organisational Lead: Head of Development.

Political Management: Lead Portfolio Holder Planning Policy and Transportation. Council's (SPTED) Review Panel will review evidence and results of consultation at each stage and make recommendations to Executive. Full Council resolution required for submission and adoption stages.

Internal Resources: Forward Plan Unit Manager and Team, Economic Development Unit, Development Control, Housing Services, Environmental Health,

External Resources: Consultants engaged to undertake Retail Capacity Study, Urban Capacity Study, Housing Needs and Market Assessment, Recreational Facilities and Open Space. Somerset County Council Education will input into educational requirements arising from new developments, Planning and Highway Departments will inform the Core Strategy regarding accessibility mapping, highway capacities, programmes, future requirements arising from developments and principles for developer contribution. County Archaeologist will provide information on the historic environment within identified general development areas and the Environment Agency will provide information on development constraints in areas at risk of flooding. DEFRA will be required to inform the Core Strategy regarding land quality in areas with potential development interest.

Stakeholder Resources: Local Strategic Partnership (LSP) to provide link to community planning. Representatives of stakeholder groups to attend meetings and focus groups.

Community and stakeholder involvement: Early stakeholder and community engagement building on work developed through the agreed SCI with the

LSP. Full consultation on issues and options and preferred options and proposals.

Post Production Monitoring: Annual monitoring of key targets and selected key indicators such as affordable housing delivery and brownfield development targets, developed in partnership with the LSP. Reported in the Annual Monitoring Report.

Taunton Town Centre Area Action Plan Development Plan Document

Overview

Role and Subject. The current Local Plan identifies areas for change within the town centre but was formulated before GOSW's RPG10, which identified Taunton as a Principal Urban Area (PUA). The AAP will address and deliver regeneration and redevelopment opportunities identified in the Borough Councils 'Urban Design Framework' which has been prepared as part of the 'Taunton Vision' exercise. A key function of the AAP will be to enable development to enhance the sub regional function of Taunton town centre through the delivery of additional retail, office, residential and leisure/cultural space. The capacity for the town centre to absorb the required levels of growth will be addressed through commissioned studies such as the Retail and Urban Capacity studies. The AAP will also set out the delivery mechanisms for improved transport infrastructure such as the Third Way/Inner Relief road completion and the Northern Inner Distributor Road (NIDR) identified through the Local Transport Plan.. The AAP will be in conformity with the Core Strategy DPD and have regard to the Community Strategy.

Due to associated pressures arising from Taunton's designation as a PUA, the Urban Design Framework and strong developer interest in progressing key town centre sites, it is considered that issues raised go beyond the scope of the existing Local Plan. A full set of up to date and clear development plan policies, following thorough public scrutiny, are required in order to implement the Vision for Taunton and to guide investment and enhancement in the sub regional centre.

The Plan will define a spatial boundary for the DPD and specify criteria for development opportunities, the range of proposed uses within each site together with the required infrastructure and planning obligations. Areas will be identified on the accompanying Proposals Map.

Coverage. Taunton town centre.

Status. Development Plan Document.

Conformity. Externally, general conformity with the emerging Regional Spatial Strategy, County Structure and Local Transport Plans, Town Centre Business Plan. Internally, with the Council's Corporate Strategy, Community Strategy, Housing Strategy and Taunton Vision/Urban Urban Design Framework.

Timetable

Pre-production / survey / consultancy phase :	Apr05- Aug05
Period of preparation, including early stakeholder and Community engagement and consultation on issues and options:	Sep05- Feb06
Pre-submission consultation on preferred options and proposals:	Mar 06

Submission to the Secretary of State:	Sep 06
Pre Examination Meeting	Feb 07
Examination:	May 07
Receipt of Inspectors binding Report	Sep 07
Estimated date for adoption:	Jan 08

Arrangements for Production

Organisational Lead: Head of Development.

Political Management: Lead Portfolio Holder Planning Policy and Transportation. Council's (SPTED) Review Panel will review evidence and results of consultation at each stage and make recommendations to Executive. Full Council resolution required for submission and adoption stages.

Internal Resources: Forward Plan Unit Manager and Team, Economic Development Unit, Development Control, Housing Services, Environmental Health, Leisure Services

External Resources: Private sector landowners and developers of regeneration sites with other bodies such as the South West Regional Development Agency and Taunton Vision Advisory Board to assist in the financial and other delivery process. Somerset County Council's Education, Planning and Highways Departments, County Archaeologist for relevant specialist advice and the Environment Agency to provide advice on addressing potential flood risk.

Stakeholder Resources: Local Strategic Partnership (LSP) to provide link to community planning. Representatives of stakeholder groups to attend meetings and focus groups.

Community and stakeholder involvement: Early stakeholder and community engagement building on work developed through the agreed SCI with the LSP. Taunton Vision Advisory Board (Chief Executives and other private sector leaders) and Executive Group (public and private sector organisations) will ensure AAP is compatible with aims of Taunton Vision. The Taunton Vision Delivery Team will be strongly involved in ensuring the delivery of the Vision and AAP proposals are fully integrated. Full consultation on

issues and options and preferred options and proposals with all groups.

Post Production Monitoring: Annual monitoring of key targets and indicators to be developed in partnership with LSP such as delivery of office floorspace. Delivery to be reported in Annual Monitoring Report.

Urban Extension Area Action Plan Development Plan Document

Overview

Role and Subject Recognised by the Government as the most sustainable development location after brownfield recycling. The Area Action Plan (AAP) will identify one or more areas to accommodate the Borough's growth requirements, together with its associated infrastructure, as identified in the emerging Regional Spatial Strategy and Taunton sub area Study. The DPD will draw on work undertaken on behalf of the Borough Council, County Council and Regional Development Agency through the existing 'Urban Extension Study' (2004) as well as other work such as the Urban and Retail Capacity studies, which will inform the LDF process of growth requirements and opportunities within the development plan period. The outcome of the Plan will be to deliver a sustainable, mixed use development(s) building onto and enhancing existing infrastructure (physical and social) of a scale to meet the growth needs of the Borough beyond that capable of being accommodated on brownfield sites.

The high growth requirements stemming from the Councils Principal Urban Area status (PUA) will require that this Plan will be commenced towards the earlier stage of the LDF process.

Coverage

The Urban Extension Study identifies an area (or areas) of land at the urban edge of Taunton as the preferred site(s) to accommodate the majority of the Borough's additional growth requirements above that identified on brownfield sites.

Status

Development Plan Document

Conformity

With the Regional Spatial Strategy and having regard to the deposit draft Joint Structure Plan Alteration (June 2004)

Timetable

Pre-production / survey / consultancy phase :	Jun06- Jan07
Period of preparation, including early stakeholder and Community engagement and consultation on issues and options:	Feb07- Aug07
Pre-submission consultation on preferred options and proposals:	Sep 07
Submission to the Secretary of State:	Feb 08
Pre Examination Meeting	May 08
Examination:	Jul 08
Receipt of Inspectors binding Report	Nov 08
Estimated date for adoption:	Mar 09

Arrangements for Production

Organisational Lead: Head of Development.

- Political Management:** Lead Portfolio Holder Planning Policy and Transportation. Council's (SPTED) Review Panel will review evidence and results of consultation at each stage and make recommendations to Executive. Full Council resolution required for submission and adoption stages.
- Internal Resources:** Forward Plan Unit Manager and Team. Other input from Economic Development, Development Control, Housing Services, Leisure Services, Environmental Health.
- External Resources:** Landowners, housing and commercial developers and their specialist teams, Somerset County Council's Education, Planning and Highways Departments for their specialist input into development requirements, County Archaeologist, Environment Agency. Taunton Vision Advisory Board to guide proposals in line with the Taunton Vision.
- Stakeholder Resources:** Local Strategic Partnership (LSP) to provide link to community planning. Representatives of stakeholder groups to attend meetings and focus groups.
- Community and stakeholder involvement:** Early stakeholder and community engagement building on work developed through the agreed SCI with the LSP. Taunton Advisory Board (Chief Executives and other private sector leaders) and Executive Group (public and private sector organisations) will ensure AAP is compatible with aims of Taunton Vision. The Taunton Vision Delivery Team will be strongly involved in ensuring the delivery of the Vision and AAP proposals are fully integrated. Full consultation on issues and options and preferred options and proposals with all groups.
- Post Production Monitoring:** Annual monitoring of key targets and indicators to be developed in partnership with LSP such as the provision of community facilities through the development. Delivery to be reported in Annual Monitoring Report

Generic Development Control Policies Development Plan Document

Overview

Role and Subject Prepared in consultation (but not jointly) with other Somerset districts, the DPD will be a non site specific set of criteria based policies providing a consistent approach across the County towards assessing ad hoc development proposals. The DPD will reflect government policy advice and be in conformity with the aims and objectives of the Core Strategy. It is unlikely to be an initial priority for preparation due the need for an adopted Core Strategy and an AAP to harness the increasing development pressure in the town centre.

Coverage

Boroughwide, excluding site allocations and locations covered by Area Action Plan DPD policies.

Status

Development Plan Document

Conformity

With the Core Strategy, relevant government policy, including PPS1 and PPS12, the County Structure Plan until replaced by emerging Regional Spatial Strategy.

Timetable

Pre-production / survey / consultancy phase :	Jun06- Feb07
Period of preparation, including early stakeholder and Community engagement and consultation on issues and options:	Mar07- Aug07
Pre-submission consultation on preferred options and proposals:	Sep 07
Submission to the Secretary of State:	Feb 08
Pre Examination Meeting	May 08
Examination:	Jul 08
Receipt of Inspectors binding Report	Nov 08
Estimated date for adoption:	Mar 09

Arrangements for Production

Organisational Lead: Head of Development.

Political Management: Lead Portfolio Holder Planning Policy and Transportation. Council's (SPTED) Review Panel will review evidence and results of consultation at each stage and make recommendations to Executive. Full Council resolution required for submission and adoption stages.

Internal Resources:	Forward Plan Unit Manager and Team. Other input from Economic Development, Development Control, Housing Services, Leisure Services, Environmental Health.
External Resources:	Prepared with other Somerset District Council's but adopted locally. Somerset County Council's Education, Planning and Highways Departments, County Archaeologist, Regional Development Agency, Environment Agency.
Stakeholder Resources:	Local Strategic Partnership to provide key link with community planning. Representatives of stakeholder groups to attend meetings and focus groups.
Community and stakeholder involvement:	Early stakeholder and community engagement. Consultation on issues and options. Consultation on preferred options and proposals.
Post Production Monitoring:	Annual monitoring of policies and selected key indicators, developed in partnership with the LSP and other Somerset District Councils. Reported in the Annual Monitoring Report.

Allocations Development Plan Document

Overview

Role and Subject

To identify and allocate sufficient development land to accommodate the growth requirements of the Borough in conformity with the Regional Spatial Strategy, Core Strategy and with regard to evidence in the Urban Capacity Study, Retail Capacity Study and Employment Land Study. Allocations will be made for residential, employment, leisure and recreation, environmental and retail space together with appropriate social and physical infrastructure across the Borough other than in those areas covered by Area Action Plans.

Coverage

Borough wide except those areas already covered by Area Action Plans.

Status

Development Plan Document

Conformity

With the emerging Regional Spatial Strategy, Core Strategy, Planning Policy Statements and having regard to the deposit draft Joint Structure Plan Alteration (June 2004).

Timetable

Pre-production / survey / consultancy phase :	Jun 06- Feb 07
Period of preparation, including early stakeholder and	
Community engagement and consultation on issues and options:	Mar - Aug 07
Pre-submission consultation on preferred options and proposals:	Sep 07
Submission to the Secretary of State:	Feb 08
Pre Examination Meeting	May 08
Examination:	Jul 08
Receipt of Inspectors binding Report	Nov 08
Estimated date for adoption:	Mar 09

Arrangements for Production

Organisational Lead: Head of Development.

Political Management: Lead Portfolio Holder Planning Policy and Transportation. Council's (SPTED) Review Panel will review evidence and results of consultation at each stage and make recommendations to Executive. Full Council resolution required for submission and adoption stages.

Internal Resources: Forward Plan Unit Manager and Team.
Other input from Economic Development,

Development Control, Housing Services, Leisure Services, Environmental Health.

External Resources:

Somerset County Council's Education, Planning and Highways Departments, County Archaeologist, Environment Agency.

Stakeholder Resources:

Local Strategic Partnership to provide key link with community planning. Representatives of stakeholder groups to attend meetings and focus groups.

Community and stakeholder involvement: Early stakeholder and community engagement. Consultation on issues and options. Consultation on preferred options and proposals, prioritising affected parishes and communities. Consultation on objection sites.

Post Production Monitoring:

Annual monitoring of policies and selected key indicators such as housing completion levels, developed in partnership with the LSP and other Somerset District Councils. Reported in the Annual Monitoring Report.

Town Centre Supplementary Planning Document

Overview

Role and Function

To provide design advice for the Town Centre Area Action Plan drawing from existing work undertaken for the Urban Design Framework (Design Code) and relating to the identified development sites in the Town Centre AAP.

Coverage

Taunton town centre

Status

Supplementary Planning Document

Conformity

In accordance with the principles of the Core Strategy, the Town Centre Area Action Plan and the published Urban Design Framework and Design Code.

Timetable

Early stakeholder and Develop draft consultation, incl. sustainability appraisal:	Community engagement:	Undertaken Sep05-Feb06
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Consultation on draft SPD
Estimated date for adoption

Mar 06
Nov 07

Arrangements for Production

Organisational Lead: Head of Development.

Political Management: Lead Portfolio Holder Planning Policy and Transportation. Council's (SPTED) Review Panel will review evidence and results of consultation at each stage and make recommendations to Executive. Full Council resolution required for submission and adoption stages.

Internal Resources: As per DPD

External Resources: As per DPD

Stakeholder Resources: As per DPD

Community and stakeholder involvement: As per DPD

Urban Extension Supplementary Planning Document

Overview

Role and Subject

To provide detailed design guidance for the implementation of identified urban extension(s) made through the LDF process. The guidance will seek to promote layouts that follow best practice and complement the distinctiveness of the location through use of local building styles and materials.

Coverage

Area as defined within the Urban Extension DPD

Status

Supplementary Planning Document

Conformity

In accordance with the principles of the Core Strategy, RSS (having regard to the Structure Plan Review Deposit Draft 2004, the Urban Extension Area Action Plan and the published Urban Extension Study.

Timetable

Early stakeholder and Feb 07	Community engagement:	Sep06-
Develop draft consultation, incl. sustainability appraisal: 07		Mar-Aug
Consultation on draft SPD		Sep 07
Estimated date for adoption		Jan 09

Arrangements for Production

Organisational Lead: Head of Development.

Political Management: Lead Portfolio Holder Planning policy and Transportation. Council's (SPTED) Review Panel will review evidence and results of consultation at each stage and make recommendations to Executive. Full Council resolution required for submission and adoption stages.

Internal Resources: As per DPD

External Resources: As per DPD

Stakeholder Resources: As per DPD

Community and stakeholder involvement: As per DPD

Affordable Housing Supplementary Planning Document

Overview

Role and Subject

To provide detailed guidance for the implementation of affordable housing policy in Core Strategy.

Coverage

Boroughwide

Status

Supplementary Planning Document

Conformity

In accordance with saved policies of adopted Local Plan until replaced by Core Strategy policies.

Timetable

Early stakeholder and	Community engagement:	Oct 05-Feb 06
Develop draft consultation, incl. sustainability appraisal:		Mar- Aug 06
Consultation on draft SPD		Sep-Oct 06
Estimated date for adoption		Jan 07

Arrangements for Production

Organisational Lead: Head of Development.

Political Management: Lead Portfolio Holders from Planning Policy and Transportation and Housing . Council's (SPTED) Review Panel will review evidence and results of consultation at each stage and make recommendations to Executive. Full Council resolution required for submission and adoption stages.

Internal Resources: Forward Plan Unit Manager and Team and Housing Manager (Private sector and development) and team

External Resources: Input from Local Strategic Partnership, Quantock Housing Partnership, Housing Corporation, House Builders Federation.

Stakeholder Resources: LSP to provide key links to community planning. Representatives of stakeholder groups to attend meetings and stakeholder groups.

Community and stakeholder involvement Early stakeholder and community engagement building on work

developed through the agreed SCI with the
LSP. Full consultation on draft SPD.

2005

2006

2007

2008

		J	F	M	A	M	J	J	A	S	O	N	D	J	F	M	A	M	J	J	A	S	O	N	D	J	F	M	A	M	J	J	A	S	O	N	D	J	F	M	A												
T O W N C E N T R E A P	Pre Production				█	█	█	█	█																																												
	Issues and Options consultation									█	█	█	█	█	█																																						
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2005

2006

2007

2008

		J	F	M	A	M	J	J	A	S	O	N	D	J	F	M	A	M	J	J	A	S	O	N	D	J	F	M	A
D E V	Pre Product ion																												
	Issues and Options consult ation																												
D P D	Preferr ed options and Propos als																												
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Local Development Scheme

2005

2006

2007

2008

		J	F	M	A	M	J	J	A	S	O	N	D	J	F	M	A	M	J	J	A	S	O	N	D	J	F	M	A	M	J	J	A	S	O	N	D	J	F	M	A	
T O W N	Early stakeholder engagement																																									
	Develop draft consultation																																									
C E N T R E	Consultation on draft SPD																																									
	Estimated date for adoption																																									

2005

2006

2007

2008

		J	F	M	A	M	J	J	A	S	O	N	D	J	F	M	A	M	J	J	A	S	O	N	D	J	F	M	A
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APPENDIX 6

SUPPLEMENTARY PLANNING GUIDANCE

The Borough Council has produced a range of Supplementary Planning Guidance over the past few years, elaborating on certain policies and proposals contained in adopted Local Plans. The 2004 planning and Compulsory Purchase Act makes no provision to “save” existing SPG as part of the new planning system. However, they will retain their status as a non statutory ‘material consideration’ in determining planning applications. Some SPG will be withdrawn as they now have little or no relevance, others will remain as SPG.

Withdrawn:

Tangier Development Guide (Approved 1992)

Tone Vale/Cotford St Luke Development Guide (Approved 1995)

SPG to remain:

Monkton Heathfield Development Guide (Approved 2004)

Taunton Deane Residential Design Guide (1998)

Norton Fitzwarren Draft Development Guide (1999)

Employment Land (draft 2003)

Shop Fronts (1996)

Advertisement Control (Undated)

Security for Shop Fronts (1999)

Proposals for New and Revised Conservation areas in Taunton Deane (1998)

Rural Building Conversions (1997)

West Bagborough Village Design Guide (2000)

Existing draft SPG to be completed as SPD

Affordable Housing (draft 2001)

