

You are requested to attend a meeting of the Executive to be held in The John Meikle Room, The Deane House, Belvedere Road, Taunton on 9 October 2013 at 18:15.

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## **Agenda**

- 1 Apologies.
- 2 Minutes of the meeting of the Executive held on 10 July 2013 (attached).
- 3 Public Question Time.
- 4 Declaration of Interests  
To receive declarations of personal or prejudicial interests, in accordance with the Code of Conduct.
- 5 Financial and Performance Monitoring – Quarter 1 2013/2014 (attached). This report is included for information only. Neither of the contact officers will be present at the meeting to answer questions.
- 6 Somerset Flooding Summit – Draft Final Report. Report of the Civil Contingencies Manager (attached).
- 7 Local Development Scheme 2013. Report of the Policy Lead Officers (attached).  

Reporting Officer: Nick Bryant
- 8 Taunton Deane Borough Council Planning Obligations Affordable Housing Supplementary Planning Document. Report of the Housing Enabling Lead (attached).  

Reporting Officer: Jo Humble
- 9 Site Allocations and Development Management Plan – Preferred Option. Report of the Policy Lead Officers (attached).  

Reporting Officer: Nick Bryant
- 10 Executive Forward Plan - details of forthcoming items to be considered by the Executive and the opportunity for Members to suggest further items (attached)

Bruce Lang  
Assistant Chief Executive

12 July 2016

Members of the public are welcome to attend the meeting and listen to the discussions.

There is time set aside at the beginning of most meetings to allow the public to ask questions.

Speaking under “Public Question Time” is limited to 4 minutes per person in an overall period of 15 minutes. The Committee Administrator will keep a close watch on the time and the Chairman will be responsible for ensuring the time permitted does not overrun. The speaker will be allowed to address the Committee once only and will not be allowed to participate further in any debate.

Except at meetings of Full Council, where public participation will be restricted to Public Question Time only, if a member of the public wishes to address the Committee on any matter appearing on the agenda, the Chairman will normally permit this to occur when that item is reached and before the Councillors begin to debate the item.

This is more usual at meetings of the Council’s Planning Committee and details of the “rules” which apply at these meetings can be found in the leaflet “Having Your Say on Planning Applications”. A copy can be obtained free of charge from the Planning Reception Desk at The Deane House or by contacting the telephone number or e-mail address below.

If an item on the agenda is contentious, with a large number of people attending the meeting, a representative should be nominated to present the views of a group.

These arrangements do not apply to exempt (confidential) items on the agenda where any members of the press or public present will be asked to leave the Committee Room.

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Lift access to the John Meikle Room and the other Committee Rooms on the first floor of The Deane House, is available from the main ground floor entrance. Toilet facilities, with wheelchair access, are also available off the landing directly outside the Committee Rooms.



An induction loop operates to enhance sound for anyone wearing a hearing aid or using a transmitter.

**For further information about the meeting, please contact the Corporate Support Unit on 01823 356414 or email [r.bryant@tauntondeane.gov.uk](mailto:r.bryant@tauntondeane.gov.uk)**

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**Executive Members:-**

Councillor M Edwards	(Business Development and Asset Management and Communications (Deputy Leader))
Councillor J Warmington	(Community Leadership)
Councillor J Williams - Leader of the Council	(Leader of the Council )
Councillor V Stock-Williams	(Portfolio Holder - Corporate Resources)
Councillor N Cavill	(Portfolio Holder - Economic Development, Asset Management, Arts and Tourism)
Councillor J Adkins	(Portfolio Holder - Housing Services)
Councillor C Herbert	(Sports, Parks and Leisure)

## Executive – 10 July 2013

Present: Councillor Williams (Chairman)  
Councillors Mrs Adkins, Cavill, Edwards, Hayward, Mrs Herbert,  
Mrs Stock-Williams and Mrs Warmington

Officers: Shirlene Adam (Strategic Director), Dan Webb (Performance Lead), Phil Bisatt (Policy Officer), James Barrah (Health and Housing Manager), Stephen Major (Housing Development Project Lead), Lucy Clothier (Accountant), Simon Lewis (Strategy and Performance Manager), Ian Franklin (Regeneration Delivery Manager), Adrian Priest (Asset Holdings Manager), Tim Child (Southwest One Property), Tonya Meers (Legal and Democratic Services Manager) and Richard Bryant (Democratic Services Manager and Corporate Support Lead)

Also present: Councillors Coles, Mrs Floyd and Horsley

(The meeting commenced at 6.15 pm.)

### 29. Minutes

The minutes of the meeting of the Executive held on 15 May 2013, copies of which had been circulated, were taken as read and were signed.

### 30. Corporate Performance Monitoring – Quarter 4 / Outturn 2012/2013

Considered report previously circulated, which detailed the performance of the Council for the final quarter of 2012/2013.

The monitoring of the Corporate Strategy, service delivery, performance indicators and budgets was an important part of the overall performance management framework. Analysis of the overall performance of the Council revealed that 65% of all performance measures were on target. This was a slightly better position compared to the previous quarter (Quarter 3 was 63%). A summary / overview of the Quarter 4 scorecard was shown in the table below:-

Section	No. of measures	☺ Green	☹ Amber	☹ Red	Trend (from last quarter)
1) Corporate Strategy Aims	18	13 (72%)	3 (17%)	2 (11%)	↔
2) Service Delivery	15	9 (60%)	3 (20%)	3 (20%)	↓
3) Managing Finances	12	7 (58%)	2 (17%)	3 (25%)	↔
4) Key Projects	7	5 (71%)	2 (29%)		↓
5) Key Partnerships	8	4 (50%)	3 (38%)	1 (12%)	↔
6) People	6	4	1	1	↑

		(67%)	(17%)	(17%)	
7) Corporate Management	10	7 (70%)	3 (30%)		↑
<b>TOTALS</b>	<b>71</b>	<b>49 (65%)</b>	<b>17 (22%)</b>	<b>10 (13%)</b>	↔

**KEY:**

- ↑ = Improving (ie more Green, less Amber and/or Red alerts)  
↓ = Worsening (ie less Green, more Amber and/or Red)  
↔ = No change.

Submitted details of the comments made by the Corporate Scrutiny Committee which had considered the Performance Outturn Report at its meeting on 23 May 2013. One of the concerns raised was the continuing high levels of staff sickness. The Executive supported the proposed setting up of a Task and Finish Group to fully investigate this issue.

**Resolved that:-**

- (1) The report be noted; and
- (2) The Corporate Scrutiny Committee be recommended to proceed with initiating a Task and Finish Group to explore the current staff sickness issue.

**31. Introduction of the Community Infrastructure Levy in Taunton Deane – Proposed Policy for Payment by Instalments**

Reference Minute No.3/2013, considered report previously circulated, concerning the introduction of the proposed Community Infrastructure Levy (CIL) Instalment Policy.

The CIL Regulations allowed a charging authority, like Taunton Deane, to accept payment of CIL by instalments, so long as a policy to that effect was published on the Council's website.

Noted that the Council needed to bring forward such a policy so that this was available for the CIL Examination which was due to commence on 24 July 2013, although the policy itself would not be formally examined.

The Instalment Policy set out in the Appendix to the report differed from the draft policy issued in January 2013 as follows:-

- (i) All categories of development, whether residential or non-residential, would be subject to the same type of instalment policy – to do otherwise would pose intractable problems in the case of mixed-use developments; and
- (ii) It did not appear possible to have payment by instalments linked to completion of a specified proportion of dwellings or floor space on a site. This was because the complexity of the CIL administration process required

automation, and the computer software was only able to issue notices or letters in response to an elapse of periods of time.

Reported that in view of (ii) above, consideration had been given to the rate at which developments might be completed, and thus the number of instalments and time periods for payment of each instalment.

It was important to note that, if there was no instalment policy in place, payment of CIL would become due in full 60 days following commencement of development.

**Resolved** that the proposed Community Infrastructure Levy Instalment Policy be endorsed.

### 32. **Halcon North Regeneration - Creechbarrow Road Project, Taunton**

Reference Minute No. 10/2013, considered report previously circulated, concerning the outline detailed proposals primarily in relation to the Council's portion of the site.

The revised development project sought to maximise the opportunities afforded by Homes and Communities Agency funding allocated to Knightstone Housing Association (KHA) and changes to housing finance resulting in more resources available for the Council's Housing Revenue Account (HRA) to invest in new affordable housing, along with land available in the development site. The aim of the project was to assist in tackling the high levels of deprivation in the Halcon Ward and to provide more affordable housing.

Since this time much work had been undertaken to progress the scheme, to the point where final approval for the TDBC element was now requested in this report.

The site was currently being assembled by decanting the current tenants and buy back of the leasehold properties along with giving notice to quit on the garages.

All the current flats/houses on the Creechbarrow Road site would be demolished. One end of the site would be transferred to KHA and they would construct 32 affordable rented houses on this area. The remainder of this site would remain in Taunton Deane ownership, on which 60 new homes for Social rent would be built.

Whilst the project was housing driven, it was also designed to help tackle the deprivation in the area. In total, the proposal was for 92 new homes on the site, a significant increase over the number of properties currently on the site. This represented a significant increase in better quality affordable homes that were cheaper to run and potential investment of over £12 million in this area.

The proposed play/green area would provide a new central focus and help integration of the new and the existing properties and provide a quality open space and the Community Hub building would potentially provide a valuable facility for the provision of services to the Halcon Ward.

The KHA outline development was comprised of 32 dwellings in total, consisting of the following.

- 1 x 1 bed two-person Flat Over Garage (FOG);
- 3 x 2 bed four-person FOG;
- 9 x 1 bed two-person elderly persons flats (including 3 wheelchair compliant);
- 6 x 2 bed three-person elderly persons flats (including 2 wheelchair compliant);
- 3 x 2 bed four-person houses;
- 9 x 3 bed five-person houses; and
- 1 x 4 bed seven-person house.

KHA funding was supported by Homes and Community Agency (HCA) grant for 30 of the 32 new dwellings. The grant conditions required completion of these properties by 31 March 2015.

Heads of Terms for the disposal of the KHA portion of the site were currently being prepared. Previously the Council had commissioned Savills to undertake an assessment of the residual value of the KHA portion of the site for affordable housing. This had confirmed a negative residual value, and consequently the site would be disposed of for £1. The Council was operating in an “open book” fashion with KHA and the total scheme cost for the KHA part was likely to be £3,972,000 and showed a substantial loss.

Reported that if during contractor procurement the KHA scheme revealed a changed position to generating a surplus, an overage agreement had already been negotiated where KHA and the Council would benefit equally in any surpluses derived. In addition a buy back for £1 clause had been included in the draft Heads of Terms so the Council would be able to re-purchase the site if the scheme faltered.

The outline of Taunton Deane’s development was comprised of 60 new properties in accordance with the mix below:-

- 9 x 1 bed two-person elderly persons flats (including 3 wheelchair compliant);
- 6 x 2 bed three-person elderly persons flats (including 2 wheelchair compliant);
- 1 x 1 bed two-person (FOG);
- 3 x 2 bed three-person (FOG);
- 6 x 1 bed two-person wheelchair compliant flats;
- 8 x 1 bed two-person flats;
- 6 x 2 bed three-person flats;
- 4 x 2 bed four-person houses;
- 13 x 3 bed five-person houses;
- 2 x 4 bed seven-person houses;
- 1 x 5 bed eight-person house; and
- 1 x 6 bed nine-person house.

An Elderly Persons Court would be provided comprising six two-bed and nine one-bed properties all designed to cater for non close-care elderly persons, with the inclusion of wheelchair transfer areas and level access showers in all flats with the option of reverting to baths should they be required. In addition, six ground floor wheelchair compliant ground floor flats had been included in the scheme proposal.

The development would include the following Design Standards:-

- Code for Sustainable Development – Level 4 - The new homes would be much cheaper to run for the occupants in that they would be 25% more energy efficient than current Building Regulations. In addition, Level 4 aimed to:-
  - (a) reduce potable water consumption per person;
  - (b) encourage good waste management and recycling, both during construction and the occupation of the building;
  - (c) encourage the use of sustainable and/or recycled building materials;
  - (d) encourage the use of low or zero carbon technologies;
  - (e) increase the health and wellbeing of the occupants; and
  - (f) protect and enhance the ecology.
- Lifetime Homes - The Creechbarrow Road scheme layout and house layouts would fully conform to the latest Lifetime Homes design criteria, which ensured that a home built to the standards would be adaptable to allow future changes in occupant's circumstances to be accommodated through pre-planned alterations rather than requiring them to move house.
- Secured by Design - An integral part of the overall sustainable development strategy was to adopt the Secured by Design Police initiative providing guidance and encouragement to those engaged within the specification, design and build of new homes to adopt crime prevention measures in new development. Compliance with the guidance had been proven to reduce the opportunity for crime and the fear of crime, creating safer, more secure and sustainable environments.
- Taunton Protocol – This had been adopted by the Council in November 2011 and set out the Council's aspirations for development in the fields of carbon reduction, building design and valuation, producing significant reductions of Co2 to help meet the Government's challenging targets for reducing the impact of climate change.

Further reported that the scheme would remove a current Housing Revenue Account owned play area at the northern end of the site which was of poor quality. In its place a new, more central play area/open space would be provided in the scheme. An equipped area for younger children known as a Local Equipped Area for Play was to be provided within the development, without the necessity of crossing Creechbarrow Road.

A three storey building was proposed at the end of Moorland Road. This would provide dwellings (8 x 1 bed, 2 person flats) on the first and second floors and a community facility on the ground floor which potentially could include the following features:-

- Walk in community facilities such as youth meeting place, internet provision and community café;
- Access to advice and services via volunteers and agencies;
- Meeting/activity rooms;
- Smaller interview rooms; and
- Landing pad workstations (hot desks) for partner agencies working in the area.

It was the intention through the construction phase to maximise opportunities for local community involvement and benefit through such things as requiring contractor(s) to provide training/apprenticeship opportunities that may lead to longer term employment.

Such opportunities would initially be ring-fenced to persons within the ward and the involvement of local and feeder schools in design and public art throughout the site.

In order to maximise the benefits of the scheme, it was important to let the new properties in a way that would facilitate and enable the greatest positive impact. Consequently a draft Local Lettings Plan had been created in consultation with partners and KHA which would apply to the whole development area.

Reported that the new Council properties would be subject to Right to Buy (RtB), therefore if they were let to a tenant with existing, or, in time, earned RtB eligibility (Council or HA tenant for 5 years), they could make an application to RtB the property.

However, the Council was afforded some protection by the "Cost floor" provision. This meant that for new build property for a period of 15 years, the RtB discounts would be limited to ensure that the purchase price of the property did not fall below what had been spent on building, buying, repairing or maintaining it over a certain period of time, up to the market value of the property. Therefore, in order to RtB a property, applicants would be required to pay the full build costs of the property (up to its market value).

The report detailed the results of the extensive public consultation/engagement which had been undertaken, in terms of preferences and concerns. All of the points had been assimilated into a composite design development process, which had informed the planning submission.

Reported that the following was the current position as far as site assembly was concerned:-

- (i) Notice to quit had been issued to all tenants of garages. Many were now vacant with keys returned;
- (ii) 15 properties had been decanted to alternate accommodation;
- (iii) 15 accepted offers on alternate property and were somewhere down the path of moving home; and
- (iv) Negotiations were continuing with leaseholders for the buy back of properties.

The area of the scheme included four properties at the end of Moorland Road. Of these, one (No 1) was owned by the General Fund (GF) as it was "bought back" by Housing Enabling during the course of the original larger project. The remaining three properties were owned by the HRA. It was proposed that the property was transferred to the HRA from the GF at a price agreed following formal valuation.

Following updates to the proposals reported to the Executive in February 2013, a detailed financial appraisal of the current proposed scheme had been undertaken and provided the following conclusions. However it should be noted that the construction work had not yet been subject to tendering and it was likely that reductions in the projected costs could be achieved through a competitive tendering process:-

- The Total Scheme Costs for the project was £8,143,000;

- Based on income from rents over a 30 year period the scheme could afford to repay £5,764,000 over 30 years.
- Therefore the scheme required a subsidy of £2,379,000
- The payback period (the time at which the full cost – including the £2,379,000 above - was paid back) = 46 years.

The current 2013/2014 Capital Programme included an approved budget for the scheme totalling £7,667,000. In addition, there was an approved budget allocation of £200,000 included in the 2012/2013 Capital Programme for this scheme, giving approval for Total Capital Expenditure of £7,867,000.

The updated estimate of Total Scheme Costs exceeded the current approval, therefore it was necessary to request a budget increase of £276,000 in order to proceed to tender, as shown in the following table:-

	£
Current Capital Expenditure Budget for the scheme:	
2012/13 Capital Programme	200,000
2013/14 Capital Programme	7,667,000
Current Budget	7,867,000
Updated estimate of Total Scheme Costs	8,143,000
Additional Budget Approval Required	276,000

In terms of funding arrangements for the scheme, when the initial proposals were approved £200,000 was allocated from HRA Reserves and Members agreed in principle to approve funding for the balance via borrowing. The Council had experienced significant growth in RtB sales – and therefore capital receipts – in the last year. It was therefore proposed to use RtB capital receipts to fund 10% of the scheme, taking into account the requirement to meet the conditions of the One for One Replacement Agreement with the Government. The following table summarised the proposed funding at this stage:-

	£
Estimated Total Funding Required	8,143,000
Proposed Funding:	
HRA Reserves	200,000
RtB Capital Receipts	814,000
Social Housing Development Fund (indicative only)	1,686,000
Borrowing (indicative only)	5,443,000
Total Funding	8,143,000

Giving approval to support expenditure through borrowing would enable the scheme to proceed.

Although the Business Case indicated that the HRA would effectively provide a subsidy for the scheme within the current 30-year plan, the investment in the increased housing that the scheme provided did pay back over 46 years. It was therefore reasonable to

conclude that the investment was affordable over the long term and that the properties should have a useful life of at least 46 years if properly maintained as planned.

**Resolved** that Full Council be recommended to:-

- (1) Grant authority to the Housing and Health Manager to progress and implement the Creechbarrow Road, Taunton Redevelopment Scheme;
- (2) Approve an 'in principle' commitment to promoting a Compulsory Purchase Order(s) to progress the redevelopment scheme;
- (3) Approve, subject to valuation, the transfer of 1 Moorland Road, Taunton from the General Fund to the Housing Revenue Account;
- (4) Approve a Supplementary Estimate of £276,000 thus increasing the total Capital Expenditure Budget for the scheme to £8,143,000, and to note the proposed funding plan for the scheme, including borrowing; and
- (5) Comment on the proposed joint TDBC and KHA Local Lettings Plan for the development and confirm support for principles contained therein.

### **33. Extension of Somerset Aster Living Care and Repair Contract**

Reference Minute No 82/2009, considered report previously circulated, concerning a proposal to extend the Aster Living Care Contract by sixteen months.

In 2010, Somerset County Council (SCC), the Primary Care Trust and Sedgemoor, West Somerset, Mendip and Taunton Deane Councils commissioned Ridgeway Care and Repair (now Aster Living) to provide a contracted Home Improvement Agency service in Somerset (excluding South Somerset).

The contract was to provide a range of services with the key ones being the delivery of adaptations to vulnerable households via Disabled Facilities Grants (DFGs) and a Handyperson service. The service commenced in November 2010 on a three year contract.

Previously within Taunton Deane, 'Home Aid' (an in-house team) had provided the Home Improvement Agency (HIA) service. As part of the new commissioning, SCC had diverted its £117,000 Supporting People monies from Taunton Deane Home Aid to the new provider.

The Council's historical contribution to Home Aid had been the provision of premises and an administration fee taken from the DFG budget for administering the Grants. Taunton Deane's commitment to future funding was therefore limited to funding a 12% fee on DFGs awarded. This was unusual in this respect as all of the other District Councils that commissioned the services had committed a significant annual contribution as well as the 12% fee.

The new HIA had been commissioned to provide a service for vulnerable clients that would support applicants for DFGs, liaising with them and Occupational Therapists (OTs). It would also assist clients in applying to the Council for a Wessex Loan to

undertake important repairs to their properties and provide support and signposting where there was a funding shortfall.

Additionally the new provider was contracted to operate a Handihelp Service across the County. As a result a decision was taken to end the existing Taunton Deane Handyperson service.

The remaining statutory elements of the Council's DFG responsibility which included assessing the eligibility and need for the adaptation and to ensure the adaptation had been installed was packaged together into a new partnership arrangement as part of the Somerset West Private Sector Housing Partnership (SWPSHP). Essentially the SWPSHP made referrals to the HIA and verified its work.

Further reported that the existing contract with Somerset Aster Living Care was due for renewal in November 2013 and the HIA Commissioners had made the decision to extend the existing contract by sixteen months to 31 March 2015.

The Commissioners were proposing that the overall county-wide funding level of the contract remained the same for this sixteen month period however that the contributions from the District Councils should be redistributed to reflect the level of service that each District area received, making contributions fairer to reflect the cost of running the HIA. The implications of this were an increased cost of the services to Taunton Deane, as well as changes to the other District Council contributions.

Aster Living was part of the Aster Group a major company with a turnover of £150,000. It was a not for profit organisation providing HIAs in different parts of the country. The key services provided in Somerset and for Taunton Deane were:-

- Delivery of DFGs;
- Handyperson Service;
- Gardening and Painting / Decorating Service;
- Home from Hospital Service;
- Reablement Service; and
- Other Value Added, including the provision of comprehensive service and checks, strong partnerships with other agencies and all caseworkers trained to the Trusted Assessor level.

The first complete year of the new contract was 2011/2012 however this was hampered by a legal challenge. Consequently the organisation was not properly established until April of 2012 by which time the list of DFG applications had grown.

In the interim, the SWPSHP had dealt with the high priority clients and Council tenants DFG applications. It took Aster and the SWPSHP some time to clear the backlog with the majority of DFG applications being approved towards the end of the financial year and rolled over into 2012/2013.

In 2012/13 the number of completed DFGs increased however again was below the targeted number. Two key reasons for this were:-

- Delays in the end to end process, due to referral delays from OTs in the early stages of the implementation of the Reablement programme and the clearing of the waiting list for low priority clients which dated back to the start of the contract (see 5.1 above) meant that there was a high drop-out rate of applicants during the process; and
- The success of the Reablement Scheme had led to more being spent through Adult Social Care and through the Handyperson service for minor adaptations with a corresponding reduced demand on major adaptations through the DFG service.

The following has been delivered in Taunton Deane over the past two years:-

<b>Year</b>	<b>DFG Enquiries</b>	<b>DFG Completions</b>	<b>Handyman Jobs</b>	<b>Home from Hospital</b>	<b>Gardening and Decorating</b>
2011/12	201	32	1515	N/A	N/A
2012/13	146	43	1132	11	400

Further reported that at the time of commissioning the new HIA and of Taunton Deane joining the SWPSHP, the Council had calculated that all costs of the internal HIA service had been funded from the Supporting People Grant received and from the DFG administration fee. The Supporting People grant was subsequently diverted from the Taunton Deane in-house service to the new countywide contract and the Council declined to commit further monies into the Core HIA service, except for the 12% administration fee, taken directly from the DFG Capital Budget.

This was in stark contrast to the other three District Councils (WSDC, SDC and MDC) who had contributed an average of £54,000 per annum each annually over the past three years to the core costs of the HIA.

Furthermore, Taunton Deane opted at the time to end their own Handyperson Service and take the budget as on-going savings due to financial pressures. No money was allocated toward the Handyperson element of the HIA contract even though the other three Councils had committed an average of £9,200 each per annum.

The HIA Commissioning Group was now looking to extend the Aster HIA contract for a further sixteen months from November 2013 with the intention to retain the same overall level of funding for the contract. The District Council representatives had requested that a more equitable contribution was made from each District Council toward the District Council share of the bill.

It was clear that Taunton Deane was currently not contributing an equitable amount to the cost of operating the HIA in Somerset compared to its neighbouring Districts. Each of the District Councils had now been asked to put forward their commitments for the next two years.

Although there was no exact science to what a fair contribution should be, the HIA Commissioning Board had proposed that District Council funding for the Core Service for the sixteen month contract extension should be based on the number of DFGs delivered in their area by Aster during 2012/2013.

Together with a contribution towards the Handyperson Service, it had been calculated that Taunton Deane would be required to identify a £48,300 annual contribution towards the contract (£44,300 General Fund and £4,000 from the Housing Revenue Account). As the contract started in November, the part year cost in 2013/2014 would be up to £17,800 General Fund and £1,700 HRA.

The report contained a number of alternative options which could be considered by Councillors. These included increasing the charges on the Handyperson Service, withdrawing from the contract and providing the service in-house which would be far more expensive and remaining in the HIA Partnership and continue not to contribute financially. With regard to the latter, this would result in a much reduced service or even the withdrawal of the service in Taunton Deane.

**Resolved** that £48,300 per annum be committed annually (£44,300 from the General Fund and £4,000 from the Housing Revenue Account) from November 2013 towards the Home Improvement Agency contract, with the continuing budgetary impact being factored into the Medium Term Financial Plan.

34. **Executive Forward Plan**

Submitted for information the Forward Plan of the Executive over the next few months.

**Resolved** that the Forward Plan be noted.

35. **Exclusion of the Press and Public**

**Resolved** that the press and public be excluded from the meeting for the following items because of the likelihood that exempt information would otherwise be disclosed relating to Clause 3 of Schedule 12A to the Local Government Act, 1972 and the public interest in withholding the information outweighed the public interest in disclosing the information to the public.

36. **Sale and Acquisition of Freehold Interest in Land at Lisieux Way, Taunton**

Considered report previously circulated, concerning the proposed sale of a freehold interest in part of the site at Lisieux Way in Taunton, plus a freehold acquisition of an alternative part of the site. The proposal, if approved, would 'open up' the site for development as employment land, under the Council's priority of growth and regeneration.

The site in total extended to approximately 6 acres with the Council currently owning the freehold interest in approximately 4.41 acres.

A business had held this part of the site on a lease from the Council for many years with approximately 58 years of the term to run. The Council was currently receiving a ground rent each year in respect of the lease, details of which were reported. Rent reviews were held at 14 year intervals but, as the last review was held in 2006 it was

unlikely that the rent would increase in the foreseeable future. The business owned the freehold interest in the remainder of the site.

The whole site had unsuccessfully been marketed over the past few years due to the lease of part of the site, which made it an unviable purchase in its current situation for a private investor.

The result of the inability to sell the combined interests of the Council and the existing business on the open market was that the site remained mainly vacant. The site was well located for redevelopment for employment use and was currently undeveloped at a time when there was demand for employment space in such a good location and a severe shortage of suitable alternative sites.

There were currently two tenants on the site occupying Buildings "1" and "3", details of which were submitted.

Reported that a Property Development Company had recently agreed terms to purchase the business's interest in the site. They had now approached the Council with a view to purchasing Taunton Deane's interest to give them the freehold of the whole site. They proposed to redevelop the site for employment uses and this would be reflected in any legal agreement between the parties.

The consideration for the purchase would be the transfer of the freehold interest in the newly refurbished "Building 3". The building was currently occupied on a Full Repairing and Insuring Lease which commenced on 31 May 2012 and was for a term of 25 years with 5 yearly rent reviews. Details of the current occupiers and the current annual rental were detailed in the report.

As the rental income available under this lease would be greater than the rent received by the Council from the business which currently leased the Council's land by a significant sum each year, there was additional value to the Council from the proposed sale and acquisition. A proposed consideration had been negotiated and provisionally agreed with the Property Development Company for the acquisition of the freehold of "Building 1". With Stamp Duty and a contingency for other associated costs of acquisition, the difference in rent would represent an annual return of 8% gross on the up front capital investment.

The report went on to comment on the Capital Costs and Funding, the Return on Investment and the Revenue Implications and Affordability.

From an investment perspective, the positive Net Present Values indicated the investment opportunity represented an attractive proposition. However, it was important to note that as with any investment this would not be risk-free.

The proposal was likely to produce a continuing net saving to the Council, indicating that the proposal would be affordable if fully funded through borrowing. The annual savings would be higher if the Council used reserves (cash) towards the funding of the capital costs.

**Resolved** that:-

- (1) Full Council be recommended to support the proposed sale and acquisition of land and buildings at Lisieux Way, Taunton and that a Supplementary Estimate to the Capital Programme to the amount detailed in the report for this purpose be approved, via borrowing;
- (2) It be noted that the continuing revenue implications would be taken into account as part of the annual budget setting process; and
- (3) The proposed economic development uses of the site in the future be approved in conjunction with the Section 151 Officer, the Portfolio Holder and the Shadow Portfolio Holder.

### **37. Land at Creedwell Orchard Housing Estate, Milverton**

Reference Minute No 100/2011, considered report previously circulated, concerning the broad terms and conditions to be included in an Option Agreement in respect of the proposed sale of a small area of land to S Notaro Limited (SNL).

At its meeting on 16 November 2011, the Executive resolved to dispose of an area of land forming part of Creedwell Orchard Housing Estate in Milverton on terms and conditions to be agreed by Southwest One and endorsed by the District Valuer to provide access to an adjoining field to be developed by SNL.

However, following the submission of a Town and Village Green Application by a group of Milverton Residents on the land to be developed by SNL, terms and conditions for the immediate sale of the Council's land could not be agreed.

Following further discussions with SNL, the company was now prepared to enter into an Option Agreement to purchase the Council's land in the future assuming a successful outcome with the Town and Village Green Application, on terms and conditions to be agreed in consultation with specialist external legal advisors and endorsed by the District Valuer. Details of the draft terms and conditions were submitted for the information of the Executive.

The sale of an Option Agreement would provide the Council with a relatively modest capital receipt now with the prospect of a substantial capital receipt in due course, both for reinvestment into affordable housing.

Also reported that after full consideration by the Council's Legal and Democratic Services Manager, it had been established that the Critchel Down rules were not considered to be applicable in this case and, therefore, the Council could proceed with the sale of its access land to SNL without the need to formally offer the land back to the previous owner or successors in title.

It had now been formally accepted by Taunton Deane, as the Local Planning Authority, and the County Council that the Council's land was suitable as a single highway access for the development land and as a consequence of this, Council had amended the original Section 52 Agreement associated with the extant permission, so omitting any requirement for off-site widening work or two points of access for the development.

**Resolved** that:-

- (a) The granting of an Option Agreement to S Notaro Limited to purchase the Council's access land, identified on the plan included with the report, on terms and conditions to be agreed by Southwest One be approved, subject to being certified by the District Valuer as representing best value for Taunton Deane Borough Council;
- (b) It be also approved that the premium for the option Agreement and any future capital receipt arising from the sale of the Council's land be reinvested into the provision of affordable housing; and
- (c) The Solicitors, David Jones Bould, provide further advice to the Council in respect of other terms and conditions to ensure that the Council's future interests were best protected.

(The meeting ended at 7.36 pm.)

# Taunton Deane Borough Council

**Executive – 9 October 2013**

**Financial and Performance Monitoring – Quarter 1 2013/2014**

**Joint report of the Performance Lead Officer and Financial Services Manager**

(This matter is the responsibility of Executive Councillor Mrs Vivienne Stock-Williams)

## **IMPORTANT – PLEASE NOTE:**

**In order for this performance information to be debated in the most efficient manner at the Executive committee, we would encourage Members who have queries with any aspect of the report to contact the appropriate officer(s) named (at the end of the report) before the meeting so that information can be collated in advance or relevant officers can be invited to the meeting.**

## **1. Executive Summary**

This report provides an update on the financial position and the performance of the Council to the end of Quarter 1 of 2013/14 (as at 30 June 2013). The monitoring of the Corporate Strategy, service delivery, performance indicators and budgets is an important part of the overall performance management framework.

The detailed 2013/14 financial position for Quarter 1 is provided in section 2 of this report although a high level summary is also included in the Scorecard (Appendix A, section 2).

The overall financial position of the Council remains within 1.1% of the approved budget.

The current forecast outturn for the financial year 2013/14 is:

- General Fund Revenue is an overspend of £149,000
- Housing Revenue Account (HRA) to remain within budget overall.

The Corporate Scorecard (aims, objectives, measures & targets) has been refreshed to reflect the new 2013 – 2016 Corporate Business Plan.

Analysis of the overall performance of the Council reveals that 60% of all performance measures are on target (ie Green alert).

Of the five 'Red' alerts within the scorecard, information has been provided in additional 'Key Risks/Issues/Impacts' sheets for: 'Family Focus' project (ref 3.2), Fly-tipping (ref 3.4), and Equality Action Plan (ref 6.5).

## 2. 2013/14 Financial Position – Quarter 1 Update

### Introduction

- 2.1 The overall financial position of the Council is that full year net spending is currently projected to outturn at a level 1.1% above that budgeted.
- 2.2 Members will be aware from previous experience that the position can change between 'in year' projections and the final outturn position. The budget monitoring process involves a detailed review of all budgets. Budget Holders, with support and advice from their accountants, regularly review the position and update their forecasts based on currently available information and knowledge of service requirements for the remainder of the year. As with any forecast there is always a risk that some unforeseen changes could influence the position at the year end, and a number of risks and uncertainties are highlighted within this report. However, the current forecast is considered to be reasonable based on current information.

### General Fund Revenue Account - 2013/14 Forecast Outturn

- 2.3 The current forecast outturn for the Council's General Fund services is an over spend of £149k (1.1% of Net Budget) for the financial year 2013/14. A summary of the General Fund Revenue Account budget and forecast for the year is included in **Annex A**.
- 2.4 There are a number of significant variances included within the reported overspend as updated from the budgeted position:
- a) **Deane Helpline:** There are various factors which have led to a projected overspend of £125k. Firstly, £19k of computer licensing costs previously included within ICT recharges, were not budgeted for. Furthermore, expenditure on equipment of £30k necessary for the operation of the service was not incorporated into the capital programme, and has instead been charged to revenue in the year. There has been £22k incurred in additional staffing costs, although an overall reduction in hours worked should help to mitigate this expenditure. Finally, the loss of major contract income (£53k) has severely impacted the service. An external review will begin shortly to identify ways of reducing the Council's future financial commitment.
  - b) **Rent Allowances:** This is a demand led service and the fluctuations in the number of people claiming benefit is outside of TDBC control. Due to the poor state of the economy and cuts in welfare benefits, customer's ability to repay overpaid benefit has been severely compromised and consequently, despite best efforts, recovery rates have deteriorated leading to a projected adverse variance of £160k
  - c) **Rent Rebates:** The factors influencing this service are the same as those set out in b) above; and it is anticipated that the full year impact on the budget will lead to an adverse variance of £58k.

d) **Somerset Waste Partnership:** The service overall is currently projected to underspend by £92k. The main variations arise from household waste collection which is currently underspent by £132k. This variance results from an £80k increase in garden waste fees, and from a £52k reduction due to contract fee amendments. However, some of these savings are offset by the predicted £40k overspend on the provision of recycling services.

2.5 Further information regarding the above and other reported variances to budget, together with the management action that has been taken, or is planned, is included in **Annex B**.

### **General Fund Reserves**

2.6 The General Fund reserve balance at the start of the year was £3.943m. Following approved budget allocations during the first quarter of 2013/14 the budgeted balance at the end of the current financial year has reduced to £2.333m (see **Annex C**).

2.7 If the current trend continues on all of the budgets highlighted above, and the Council takes no further corrective action in the year, the potential overspend of £149k would be transferred to this reserve, decreasing the projected balance to £2.184m at the end of the financial year.

2.8 This is well above the current minimum balance of £1.50m required in the Council's financial strategy.

2.9 The Council's Strategic Director (Section 151 Officer), has also commissioned a review of all earmarked reserves which will be completed later this year.

### **General Fund - Risk and Uncertainty**

2.10 Budgets and forecasts are based on known information and the best estimates of the Council's future spending and income. Incomes and expenditures over the financial year 2013/14 are estimated by budget holders and then reported through the budget monitoring process. During this process risks and uncertainties are identified which could impact the financial projections, but for which the likelihood, and/or amount are uncertain.

2.11 The following risks have been identified through the Q1 process:

a) **Deane Helpline Trading Account** – There is at the end of June, a significant predicted adverse variance against the approved budget for the year, which the Council will have to meet unless actions can be put into place to mitigate these costs. The service is under urgent review and the Theme Manager is working closely with external consultants engaged to consider options for future delivery.

b) **Building Control** – Income levels are below that expected at the end of the first quarter, and although savings from elsewhere within the service will offset this, careful monitoring of future levels of income is essential.

- c) **The DLO** – Is currently operating within its overall budget. Work is ongoing to review the DLO budgets in detail, but it is a complex organisation. There are significant monies involved in the DLO operation, and although the current forecast is at budget, all expenditures and incomes must be carefully monitored throughout the year.
- d) **Land Charges** – Changes in delivery of the service could potentially lead to a loss of income, although this cannot be quantified at this time.
- e) **Cemeteries and Crematoria** – The new Crematorium planned for Bridgwater may adversely impact upon income levels later this year, although the start up date of operation for the new facility is as yet uncertain.
- f) **Rent Allowances and Rent Rebates** – Budgets are being adversely impacted by factors such as the downturn in economic conditions, and through continued Government reductions in Welfare spending.
- g) **Year End Adjustments:** Certain items are not determine or finalised until the financial year end. For example the final assessment of provisions required for bad debts, and final allocations of support service recharges. These can result in potentially significant differences to current forecasts.

### **Forecast Outturn Summary – Housing Revenue Account**

- 2.12 A summary of the HRA revenue budget and forecast for the year is included in **Annex D**.
- 2.13 The current forecast outturn for the Council's Housing Revenue Account (HRA), is for overall spending and income to remain within budgeted parameters for the financial year 2013/14. However, there are a number of significant variances within both the overall income and expenditure budgets as set out in **Annex E**.
- 2.14 The provision for bad debts was increased in 2013/14 in the business plan due to the potential impact of the Welfare Reform Act. This has led to a forecast of additional rent income of £330k against the original budget as although Welfare Reform has had an affect, it is unlikely to fully impact the HRA in this financial year.
- 2.15 Conservative budgeting for the potential loss of income from void properties allowed for at 2%, has in fact led to projected additional rent incomes of £209k against budgeted levels based upon current trends.
- 2.16 Expenditure on void properties in the first quarter has been much higher than budgeted, and current forecasts show an expected spend for the year of £837k over target budget. Further work is being undertaken to establish the reasons for this spending and the management action needed. However, although it is known that the initial impact of Welfare Reform has increased the number of voids, the average length of time taken to make void properties available again for use has been reduced

to 17 days, and so rent income has not been adversely affected.

- 2.17 The likely capitalisation of much of the spending planned for asbestos removal this year has led to an expected underspend in revenue of £146k.
- 2.18 An underspend of £118k is currently forecast due to cautious budgeting for the cost of insurance claims i.e. works that could be claimed through the insurance policy, but do not meet the excess amount. This forecast will be dependent upon works actually needed, and so could change throughout the year.

### **HRA - Risk and Uncertainty**

- 2.19 As with the General Fund, budgets and forecasts are based on known information and the best estimates of the Council's future spending and income. Income and expenditure over the financial year 2013/14 is estimated by budget holders and then reported through the budget monitoring process. During this process risks and uncertainties are identified which could impact financial projections, but for which the likelihood and/or amount are uncertain.
- 2.20 The most significant risk to the current forecast is the potential underspend on the HRA Capital Programme as set from 2.36 below. The programme for the current financial year is entirely funded from HRA revenue resources, therefore an underspend in the capital budget will result in a related underspend in the revenue budget. Should this underspend materialise at the end of the financial year, recommendations in respect of any surplus funds will be included within the Financial Outturn Report.
- 2.21 The Council carries protection against risk and uncertainty in a number of ways, such as insurances and maintaining reserves.
- 2.22 Potential changes to the rent formula - the way in which the HRA is able to increase rents was unveiled as part of the Spending Review 2013. Rent convergence, whereby rents can be increased or decreased by up to £2 per week each year to bring them in line with 'target' rents, will cease after 2014/15. The HRA will not have reached rent convergence by this time, although the business plan assumes the continuation of rent convergence. The financial impact on the business plan is currently being considered.
- 2.23 Rent increases will now be linked to CPI rather than RPI in line with a move across Government to use CPI. The effect of this will depend on future inflation rate. These changes will be updated as part of the next Business Plan review.

### **Housing Revenue Account Reserves**

- 2.24 The HRA reserves ("working balance"), at the start of the year were £2.247m. Following approved budget allocations during 2013/14, the budgeted balance at the end of the current financial year is £2.047m (see **Annex F**).

### **Budget Changes**

- 2.25 The Original Budget for the year was approved by Full Council on 26 February 2013. The budget requirement for the Council may not remain static for the whole financial year, and officers may request changes to approved budgets during the course of the financial year, either in the form of: transfers to/from General reserves, known as “Supplementary Estimates and Returns” (either General Fund or HRA); or transfers between budgets, known as “virements”. Virements that are above £50,000 in value require Executive approval.
- 2.26 There are no proposed virements recommended for Executive approval at this time.
- 2.27 There are no new requested “Supplementary Estimates and Returns” in either the General Fund or HRA included in this report.
- 2.28 It should be noted that the pay award for 2013/14 has been confirmed at 1% which is the amount assumed within the Council’s budget.

#### **Deane DLO Trading Account**

- 2.29 The forecast year end outturn shows no significant departure at the end of June from the budgeted position. There is currently a great deal of work underway to more accurately align budgets within both Grounds Maintenance and Building Maintenance, and this will improve the ease and accuracy of reporting during the remainder of the financial year. It is also anticipated that further improvements to both management and financial reporting will result from the replacement of the DLO’s costing system (COSY), with the Capita OpenContractor system.
- 2.30 The DLO is continuing to implement the aforementioned replacement IT system, and work also continues on the depot relocation project.
- 2.31 A Trading Account Summary and Reserves Position Statement for the DLO are included in **Annex G**. The trading account reserves are reported as part of the General Fund Earmarked Reserves balance.

#### **2.32 Deane Helpline Trading Account**

The Deane Helpline Trading Account is predicted to make a full year loss of £125k, based upon the position at the end of the first quarter, as highlighted with 2.4a above. A review by external consultants will begin shortly to consider the future provision of this service, and to also identify ways of reducing the Council’s future financial commitment.

#### **Forecast Outturn Summary – General Fund Capital Programme**

- 2.33 The current forecast outturn for the Council’s General Fund Capital Programme is Net Expenditure of £12,706k, compared to the budget of £12,706k. The forecast variance is therefore zero for the financial year 2013/14. However, £6,843k has been reported as slippage (timing of spend) on projects into 2014/15.
- 2.34 A summary of the General Fund Capital Programme budget and forecast for the year

is included in **Annex H**.

### **GF Capital Programme Risk and Uncertainty**

- 2.35 The main issues regarding risk and uncertainty in the General Fund capital programme from a financial perspective is timing of expenditure. As highlighted above, there is likely to be a significant amount of slippage into 2013/14. There are however, other issues that will also be closely monitored:
- a. There may be an additional budget required for the purchase of DLO vehicles to support new projects. If and when this finance is needed, the appropriate approval will be sought and the budget funded from DLO reserves.
  - b. It is possible that there could be slippage on the Grants to RSLs budget of £187k into 2014/15, but this is dependant upon negotiations with the developer.
  - c. Expenditure on the Private Sector Housing projects is subject to demand and so expenditure could vary from the forecast.

### **Forecast Outturn Summary – Housing Revenue Account Capital Programme**

- 2.36 The current forecast outturn for the Council's Housing Revenue Account Capital Programme is for a net expenditure of £20.229m against a budget of £20.229m. The forecast variance is therefore zero. However, £10.571m has been reported as slippage (timing of spend) on projects into 2014/15.
- 2.37 A summary of the HRA Capital Programme budget and forecast for the year is included in **Annex H**.

### **HRA Capital Programme Variances**

- 2.38 There are a number of factors that affect the delivery of capital works and the service is applying a sensible flexible approach in response to prevailing circumstances and opportunities. The forecasts from the Housing department show that the projected spend is realistic. Opportunities to accelerate spend will be taken where possible, although the service must also of course ensure that there is no reduction in the value for money achieved.
- 2.39 Although spending on capital schemes is relatively low to date. This is primarily due to the fact that planned works at Creechbarrow Road (£6.667m) will not be completed for some time leading to a significant amount of slippage in 2014/15. However, decanting works are underway and it is envisaged that spend of approximately £1m will be incurred this year.
- 2.40 Another impact on the programme is that planned spending of £4.2m for the following projects; Phase 1 Vale View West Bagborough, Phase 1 Milton Close, Phase 1 Bacon Drive, and Phase 1 Normandy Drive will all be carried out over an extended timeframe and slippage from the 2013/14 programme will be required.

### 3. The Corporate Performance Scorecard (please see Appendix A)

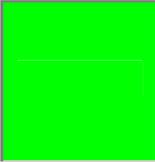
3.1 The TDBC Scorecard at **Appendix A** contains full details of Quarter 1 performance.

3.2 Scorecard explanation / key:

Each section of the scorecard uses the same template and is structured as follows:

Ref	OBJECTIVES	MEASURES	ALERT	ISSUES (current & future) and IMPACTS
	Strategic & corporate objectives categorised in the 7 sections of the scorecard	Key performance indicators (& targets where possible) used to measure the objective.	Red, Amber or Green (see below)	A brief summary highlighting reasons for and issues surrounding the alert reported (see Green, Amber, Red below). Also any known problems that may jeopardise attainment. Where relevant, CMT will provide further information in addressing under performance.

3.3 Key to performance alerts:

	Reasons for alert	Notes
	Planned actions are on course	Justification for the Green alert will be provided.
	Performance indicators are on target	Key successes or exceptional performance will be outlined.
 Amber	Some uncertainty in meeting planned actions	The reason for the Amber alert will be made clear. Mitigating actions will be outlined
	Some concern that performance indicators may not achieve target	
 Red	Planned actions are off course	A brief high level summary is included within scorecard. Where the Corporate Management Team consider a Red alert to be a priority issue requiring further detail and explanation, a separate one page information sheet for more detail will be appended to the report
	Performance indicators will not achieve target	

3.4 A summary / overview of the Quarter 1 scorecard (appendix A) is in the table below

Section	No. of measures	 Green	 Amber	 Red	N/A	Trend (from last quarter)
<b>Aim 1 - Quality Sustainable Growth &amp; Development</b>	9	4 (44%)	4 (44%)	1 (11%)		
<b>Aim 2 - A Vibrant Economic Environment</b>	8	7 (88%)	1 (12%)			
<b>Aim 3 - A Vibrant Social, Cultural and Leisure Environment</b>	9	5 (56%)	2 (22%)	2 (22%)		
<b>Aim 4 – A Transformed Council</b>	5	4 (80%)	1 (20%)			
2) Managing Finances	14	8 (57%)	5 (36%)	1 (7%)		
3) Corporate Health	12	6 (45%)	5 (45%)	1 (9%)		
<b>TOTALS</b>	<b>57</b>	<b>34 (60%)</b>	<b>18 (32%)</b>	<b>5 (9%)</b>		

**KEY:**

-  = Improving (ie more Green, less Amber &/or Red alerts)
-  = Worsening (ie less Green, more Amber &/or Red)
-  = No change

### 3.5 Corporate Performance Scorecard changes for 2013/14

3.5.1 The corporate performance scorecard was introduced in 2009/10 and has remained largely unchanged since then. CMT have reviewed the structure and content of the scorecard to better reflect the new Council's priorities following the change from the previous Corporate Strategy to the new Corporate Business Plan (2013 – 2016).

3.5.2 The key changes are:

- a) Corporate aims, objectives and measures have been refreshed (Section 1)
- b) Corporate projects section removed and incorporated within section 1
- c) Service delivery section removed and replaced with additional appendices provided by Theme Managers – Theme 'Exceptions & Highlights' reports (See Annex J). Full versions of Theme scorecards have also been made available to Members on the Members' Portal.
- d) The new 'Corporate Health' section incorporates: Human Resources, Customer Service and Corporate Governance measures.
- e) The scorecard template now includes two new columns: Quarterly trends, and the relevant Portfolio shown against each measure

3.5.3 From Quarter 2 onwards, in addition to the corporate overview, one Theme Manager each quarter will attend the Scrutiny committee meeting to provide a more in-depth report on that Theme's performance & progress of key projects and activities. Each Theme can therefore be reviewed once in a 12 month cycle.

3.5.4 A summary of the whole performance reporting framework is shown below. This indicates where other performance information can be obtained relating to a wide variety of services, partnerships, projects, and strategic aims and objectives.

<b>What</b>	<b>Responsible officer</b>	<b>Where</b>	<b>When</b>
<b>Corporate scorecard &amp; financial monitoring</b>	Dan Webb / Paul Fitzgerald	~ CMT ~ Corporate Scrutiny ~ Executive	Quarterly
<b>Theme scorecards</b>	Theme Managers	~ CMT ~ <i>Members' Portal</i> ~ <i>PFH briefings</i>	Quarterly
<b>Corporate Programmes</b> (major projects - Growth & Regeneration' Transformation)	Simon Lewis	Programme management Group	Monthly
<b>Southwest One</b> Performance / KPI monitoring	Richard Sealy	~ Corporate Scrutiny ~ Client KPI monitoring	6-monthly Monthly
<b>Somerset Waste Partnership</b> Performance monitoring report	Richard Sealy	~ Waste Board ~ Members' Portal	Quarterly
<b>Somerset Waste Partnership</b> Annual business plan	Richard Sealy	Corporate Scrutiny	Annual
<b>Tone Leisure</b> Performance report	Chris Hall	Community Scrutiny	6-monthly
<b>Housing Services</b> Performance indicators report	James Barra	Tenant Services Management Board	Quarterly
<b>Somerset West Private Sector Housing Partnership</b>	Richard Sealy?	~ SWPSHP Board ~ Client KPI monitoring	~ ~ Monthly
<b>South West Audit Partnership (SWAP)</b> - progress of audit plan	Shirlene Adam	~ Corporate Governance Officer's Group ~ Corporate Governance committee	Quarterly
<b>Project Taunton</b>	Mark Green	Project Taunton Steering Group	bi-monthly
<b>DLO transformation</b>	Chris Hall	DLO Steering Group	
<b>Climate Change</b>	Simon Lewis	Carbon Management Steering Group	Bi-monthly
<b>Taunton Deane Partnership - Priority Areas Strategy</b>	Simon Lewis	~ TDP Executive ~ TDP Board ~ Community Scrutiny	

#### **4. Finance Comments (from the Strategic Finance Officer / Deputy S151 Officer):**

- i) The budget monitoring process has been improved and provides confidence in the year end projections set out within the report. However, the current forecast is based upon the best available current information, and the overall financial position will undoubtedly change as the year progresses.
- ii) The economic climate continues to have an adverse impact upon aspects of our revenue budget. The main variances identified within General Fund revenue relate to a relatively small number of services, but these can have a significant impact on the overall financial position.
- iii) CMT and managers will continue to monitor the budget position throughout the year.
- iv) There are no significant issues currently within the HRA. Similarly there are no specific concerns within either the General Fund or the HRA capital programmes other than slippage.

#### **5. Legal Comments**

There are no legal implications in this report.

#### **6. Links to Corporate Aims**

As this report covers all aspects of the Council's performance, all Corporate Priorities are affected (ref Scorecard section 1)

#### **7. Environmental and Community Safety Implications**

Please see section 3.4 of the Scorecard for those areas contributing to the above

#### **8. Equalities Impact**

Ref scorecard section 6.5 for details of equalities progress within the council.

#### **9. Risk Management**

Ref scorecard section 6.6 for details of risk management progress within the council.

#### **10. Partnership Implications**

A number of corporate aims and objectives reported within the corporate scorecard are delivered in partnership with other organisations. Performance issues relating to specific partnerships are reported within the more detailed Theme scorecards (for example 'Corporate & Client'), as well as various other partner specific reports as described in the overall performance reporting framework – please see 3.5.4 above.

## 11. Recommendations

- 11.1 It is recommended that the Executive reviews the Council's performance as at the end of Quarter 1, taking corrective action or requesting further information from Theme Managers where necessary.

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# Appendix A

Ref	OBJECTIVES	MEASURES	Alert	Trend	Performance data & comments (Key risks/issues/achievements)	Portfolio
<b>SECTION 1) CORPORATE BUSINESS PLAN – strategic aims &amp; objectives</b>						
<b>Aim 1) Quality Sustainable Growth &amp; Development</b>						
1.1	<b>Objective 1</b> Increase number, quality & range of housing / affordable housing	Creechbarrow Rd redevelopment project	G	New	<b>Overall Project Status -</b> Planning application submitted; contractor selection underway and tender process to commence Q3 2013. Start on site scheduled for Q4.	Housing
		Number of affordable homes delivered	G	↑	<b>Annual affordable homes target - 200 homes. 53 affordable homes have been completed</b> , including the first affordable homes at Monkton Heathfield. There are a further 116 homes in the pipeline and it is anticipated there will be an increase in affordable homes being sold through the Help to Buy initiative to enable the 200 homes target to be met	Housing
		Deliver sustainable urban extensions	A	New	Discussions continue with developers in an attempt to overcome issues relating to bringing forward the Monkton Heathfield developments. The Council has successfully applied to the CLG for capacity funding and been awarded £500k to help resolve these issues Work is progressing on preferred options consultation which will include Comeytrowe/Trull.	Planning Transport and Coms
		Maintain 5 year supply of ready to develop housing sites	A	↓	2012 Strategic Housing Land Availability Assessment = We have a 5.57 year supply of ready to develop housing sites. The requirement for a 5% or 20% buffer (raised by Inspectors) is under negotiation, Amber alert reflects this uncertainty.	Planning Transport and Coms
		Major Planning applications processed in target time	R	↓	<b>Target 60% of Major Development planning applications (large and small scale) determined within 13 weeks.</b> <b>Quarter 1 2013/14 = 56.25%</b> (9 out of 16 applications determined within 13 weeks). Quarter 1 Last year = 57.14% (4 out of 7 applications determined within 13 weeks). Between January and June 2013 there has been a vacant Major Applications Officer post, there has also been an increase in the number of Major applications made during Quarter 1 compared to Quarter 1 12/13.	Planning Transport and Coms

## Appendix A

Ref	OBJECTIVES	MEASURES	Alert	Trend	Performance data & comments (Key risks/issues/achievements)	Portfolio
1.2	Objective 2 Delivering infrastructure	Firepool Project	A	New	<p><b>Target - Planning permission achieved by Summer 2014.</b> We need to agree and implement a process for obtaining Planning permission on Northern site. Telecoms mast removed from Unit 5 Canal Rd (at no cost to TDBC) - building now scheduled for demolition Jan 2014 latest. Various occupier opportunities being actively pursued. Existing master plan will be reconsidered as part of the wider town centre rethink project.</p>	Ec Dev, Assets Mgt, Tourism & Arts
		Flood alleviation solutions project	A	↔	<p><b>Overall Project Status -</b> Access obtained to likely site of upstream storage facility and initial indications are that there are no likely ecological / environmental 'show stoppers'. Funding to deliver potential schemes remains uncertain. Partnership working with the Environment Agency / project governance in place. Project Initiation Document drafted, Risk &amp; Issues register in place, project plan being developed - indicative timescale for completion c2018.</p>	Ec Dev, Assets Mgt, Tourism & Arts
		Community Infrastructure Levy (CIL)	G	↑	<p><b>Target - Adopt CIL by April 2014.</b> CIL examination to take place 24/25 July 2013. Plans on track to adopt CIL in April 2014.</p>	Planning Transport and Coms
		Strategic Transport Initiatives (NIDR, J25)	G	New	Contractor on site for delivery of NIDR – completion due late 2014.	Planning Transport and Coms

Ref	OBJECTIVES	MEASURES	Alert	Trend	Performance data & comments (Key risks/issues/achievements)	Portfolio
<b>Aim 2) A Vibrant Economic Environment</b>						
2.1	<b>Objective 3</b> Improving perception of Taunton, attracting new businesses & supporting existing ones	Taunton Town Centre 'rethink' project	G	↔	<b>Overall Project Status.</b> Project brief agreed and expressions of interest sought - submissions due to be received 2 Aug with interview & selection w/c 26 Aug - appointment/start by 9 Sept. Report and presentation on findings & recommendations to Members during Qtr 3.	Ec Dev, Assets Mgt, Tourism & Arts
		Marketing & promotion of Taunton	G	New	<b>Target - Complete 4 programmes to market and promote Taunton Deane to businesses:</b> 1. Taunton Means Business - Awareness raising campaign carried out in Q1 has resulted in increased number of investment enquiries 2. Project Taunton - 1:1 liaison with developers of key town centre sites in Taunton ongoing 3. Into Somerset - ongoing liaison with Somerset Chamber, including re EDF supply chain 4. Taunton Town Team - proactive approach to retailers to attract them to Taunton	Ec Dev, Assets Mgt, Tourism & Arts
		Business Improvement District (BID)	A	New	<b>Target - Achievement of a successful BID ballot in April 2014.</b> Taunton Town Centre Company is currently discussing with its Members and other town centre businesses the appetite and demand for a further BID. If supported the BID ballot would be held in March 2014	Ec Dev, Assets Mgt, Tourism & Arts
		Taunton town centre shop vacancy rate	G	New	<b>Target - Low vacancy rate.</b> Current vacancy rate is 8.5% against a national average of 14.1% (May 13). Several new negotiations are taking place on premises in the town centre.	Ec Dev, Assets Mgt, Tourism & Arts

Ref	OBJECTIVES	MEASURES	Alert	Trend	Performance data & comments (Key risks/issues/achievements)	Portfolio
2.2	Objective 4 Increasing economic activity	Employment & skills projects	G	↔	Job Clubs at Halcon, Priorswood and Wellington - Delivered by Vista during 2012/13 - there were 2195 attendances over the 12 months for various levels of assistance, including CV writing, IT Skills, etc. There were 50 people who found full-time employment and 139 undertook a social action/informal learning course/work experience placement. The SLA for the three job clubs for 2013/14 has just been reawarded to Vista. <i>No data available for Q1</i>	Ec Dev, Assets Mgt, Tourism & Arts
		Employment land (delivery & take-up)	G	New	<b>Target - Achieve 100% of employment land requirements as per Core Strategy by 2028.</b> Employment land developed 2006-13 = 16,926 sq.m. office and 15.76 ha industrial which equates to 34% and 43% respectively of total requirements to 2028. A further 71,194 sq.m. office and 63.31 ha industrial land is committed or allocated for development. This is monitored annually. A second strategic employment site is to be sought through the Site Allocations Plan.	Ec Dev, Assets Mgt, Tourism & Arts
		Inward investment	G	↔	17 Inward investment enquiries have been received in this quarter. Enquiries have come from the following sectors: ICT, retail, electric vehicle development, restaurant/leisure, logistics and childcare. £140,000 of £400,000 awarded in Investment grants.	Ec Dev, Assets Mgt, Tourism & Arts
		Local Business Development and Support	G	↔	<b>Target - Delivery of Business Support Action Plan</b> (including delivery of 4 Business information events in 2013/14 and small business grants). 10 small businesses supported through the Small grants fund totalling £5,000. Action plan of targeted support to businesses has been developed. October business fair planned in Wiveliscombe. Signposting to relevant training and development opportunities given to businesses.	Ec Dev, Assets Mgt, Tourism & Arts

Ref	OBJECTIVES	MEASURES	Alert	Trend	Performance data & comments (Key risks/issues/achievements)	Portfolio
<b>Aim 3) A Vibrant Social, Cultural and Leisure Environment</b>						
3.1	<b>Objective 5</b> Working with partners to encourage strong, informed & active communities	Priority Areas Strategy (PAS) – progress of projects	G	↑	Strong informed and active communities - All projects Green Access to services information and advice - All projects Green or Amber except 'Access to Health' due to decommissioning of surgery in Halcon. Improve lives of the most vulnerable households - All projects Green or Amber apart from Family Focus (see 3.2) Improve the look and feel of the local area - All projects Green The TDP has agreed a new action plan with additional projects, a new scorecard will be reported at Q2.	Community Leadership
		Halcon One Team (& 'Hub')	G	New	The Halcon One Team has been operating for twelve weeks under a joint Avon and Somerset Constabulary and Taunton Deane Borough Council pilot project. Professionals from eleven separate organisations have now formed a coordinated team, meeting three mornings a week, where daily demands effecting the Halcon ward are discussed, reviewed and actions set for delivery. In total 191 joint actions have been set and achieved. The Halcon One Team pilot has also identified ten key themes for future development; these include Domestic Violence, Drugs, Safeguarding, Unemployment, Education, Youth Diversion, Money Management, Environment, Tenant Management and Information.	Community Leadership
		Health & Wellbeing strategy	G	New	<b>Target - Develop Action Plan by April 2014.</b> Audit to be carried out and action plan developed from the audit. Currently there is a lack of officer resource to deliver these actions.	Community Leadership

Ref	OBJECTIVES	MEASURES	Alert	Trend	Performance data & comments (Key risks/issues/achievements)	Portfolio
3.2	<b>Objective 6</b> Working with partners to improve the lives of our most vulnerable households	'Family Focus' (Troubled Families) project	R	New	<b>Target - To have engaged and worked with 127 families by December 2013.</b> Currently working with <b>47 families</b> . Project moving from using existing partnership resources to dedicated Family Support Workers. Family Support Workers will be in post from July 2013. We are currently behind where we would expect to be due to delays in recruitment, however will quickly increase the number of families worked with from early August. <b>Separate Risks/Issues/Impacts appended (ANNEX I)</b>	Community Leadership
3.3	<b>Objective 7</b> Facilitating and supporting cultural and leisure opportunities	Swimming Pool projects	G	↔	<b>Overall Project Status.</b> Station Road Pool Refurbishment - is well on track. Project Management team and the Design Team have been procured; site surveys have and continue to be carried out. Closedown is still on track for anticipated Oct/Nov. New Blackbrook Pool - the project team are progressing the VAT issue, Hawkins Trust discussions, Lease requirements with Tone Leisure procurement options and preparation.	Sports Parks Leisure
		Develop a new community leisure strategy	A	New	<b>Target - Develop Community Leisure Strategy by April 2014.</b> Uncertain achievable by target date due to lack of staff resource due to focus on Pools project. Parks and Open Spaces strategy review and update is in progress. The results of this will then feed into an overall draft leisure strategy which will combine our allotment, play and sports strategies that will provide an overall plan aligned to TDBC Business Plan and Wellbeing Agenda.	Sports Parks Leisure
		Taunton town centre events programme	G	New	Taunton Events Group continues to plan and deliver a comprehensive programme of events throughout Summer 2013. Marketing material produced to promote events every weekend during June to August. Somerfest on 15th June very successful. A celebration of procession, music and performing arts throughout Taunton town centre. Approx 15,000 additional visitors to the town centre (up 25%). Planned new events include Our Big Gig (13 Jul), Shakespeare Festival (8-10 Aug) and street performance.	Ec Dev, Assets Mgt, Tourism & Arts

Ref	OBJECTIVES	MEASURES	Alert	Trend	Performance data & comments (Key risks/issues/achievements)	Portfolio
		Brewhouse theatre	A	New	<p><b>Target - Develop a sustainable solution for the Brewhouse Theatre.</b></p> <p>Negotiations with Administrator continuing over acquisition of lease on the property. Consultant (David Pratley Associates) appointed to advise Council of options to reopen the theatre. He is currently liaising with interested parties to ascertain local support and capacity to operate the venue. Member Steering Group set up, due to report back to Members in Autumn.</p>	Planning Transport and Coms
3.4	<b>Objective 8</b> Maintaining clean streets, good quality parks, open spaces and leisure & cultural facilities	Fly-tipping	R	↓	<p>Enforcement action is taken by the Environmental Protection Team wherever there is evidence that can be pursued.</p> <p>Actual fly tip numbers are as follows:  Q1 2013/14 = 152  Q1 Last year = 144</p> <p><b>Separate Risks/Issues/Impacts appended. (ANNEX I)</b></p>	Env Services Climate Change
		Parks & open-spaces	G	New	<p>New investments in play equipment have been made at Hamilton Gault and the new social space at the Wellington pavilion has been handed over to the cricket club. No new surveys have been undertaken at this stage</p>	Sports Parks Leisure

**Aim 4) A Transformed Council – key projects of the transformation programme:  
Objective 9) Achieving financial sustainability; Objective 10) Transforming services; Objective 11) Transforming the way we work**

Ref	Project	Alert	Trend	Key Milestones	Key Accomplishments	Key risks/Issues
4.1	TDBC & West Somerset joint-working feasibility	G	↑	<ul style="list-style-type: none"> <li>• Project Initiation complete mid-May.</li> <li>• Submit bid for Transformation funding 11th July</li> <li>• Complete Business Case mid Sept.</li> <li>• Council decision-making process Sept - Oct</li> </ul>	<ul style="list-style-type: none"> <li>• Project team in place and Project planning undertaken &amp; documentation in place</li> <li>• Communications approach positive (newsletter, briefings &amp; workshops)</li> <li>• Draft bid created and circulated</li> <li>• Met with key stakeholders and Unison and members</li> <li>• Visit to South Oxfordshire.</li> <li>• Reports on joint Chief Executive prepared for Members.</li> </ul>	<ul style="list-style-type: none"> <li>• OPPORTUNITY – to make connections with other orgs (e.g. Exmoor Nat Park)</li> <li>• RISK – The continuation of project if Members decide not to progress with the project at any stage.</li> </ul>
4.2	Customer Access & Council Accommodation	G	↔	<ul style="list-style-type: none"> <li>• Develop business case to provide cost effective office accommodation and customer access that meets the needs of the community.</li> <li>• Agree project plan and risk assessment Aug 2013.</li> <li>• Complete research of all shared accommodation opportunities including off site visits.</li> <li>• Full business case to Full Council in December 2013.</li> </ul>	<ul style="list-style-type: none"> <li>• Project approved by Full Council &amp; resources allocated</li> <li>• Project manager appointed &amp; team assembled</li> <li>• SMART officer tour completed</li> <li>• High level principles agreed</li> <li>• Deane House valuation and Firepool new build costs requested</li> <li>• Customer channel matrix in progress.</li> <li>• Communications and FAQs drafted.</li> <li>• Deane House condition survey completed.</li> <li>• Staff ways of working study completed.</li> </ul>	<ul style="list-style-type: none"> <li>• RISK – Some slippage of timescales due to officer leave and waiting for third party information.</li> <li>• RISK – Failure to produce positive business case and upfront investment too expensive.</li> <li>• RISK – No partners identified for joint solutions.</li> <li>• RISK – Conflicting demands on available resources.</li> <li>• RISK – Achieving cross political party support.</li> <li>• RISK – Development constraints; access, flooding, tree protection orders and environment, existing car parks, pool parking.</li> <li>• RISK – Failure to join up with overlapping projects Asset Strategy, West Somerset projects.</li> </ul>

Ref	Project	Alert	Trend	Key Milestones	Key Accomplishments	Key risks/Issues
4.3	Asset Strategy	G	↑	<ul style="list-style-type: none"> <li>• Agree Project Initiation Document &amp; complete Scope of Work by 31st May 2013.</li> <li>• Procurement of external expertise w/c 12th Aug 2013.</li> <li>• Draft Strategy &amp; DMF to CMT for review late Sept</li> <li>• Strategy to Full Council Oct 13</li> <li>• Implementation from Nov 13</li> </ul>	<ul style="list-style-type: none"> <li>• Members agreed funding for project May 13.</li> <li>• Completion of the Request for Quotation document.</li> <li>• Commencement of the Procurement process.</li> <li>• Progress update provided to Portfolio Holder and Shadow.</li> </ul>	<p>Issue – Production of Strategy may not be achievable by October due to tight timescales and dependence on external expertise.</p> <p>Issue – Potential overlap with other projects (customer access/Accommodation, Pools and DLO relocation, West Somerset) more joined up approach required.</p>
4.4	DLO depot relocation feasibility	G	↔	<ul style="list-style-type: none"> <li>• Marketing complete and preferred bids selected 04/13</li> <li>• Assess changes to offers received and feasibility of an alternative site July 2013</li> <li>• Bidders interviews 29th July 2013.</li> <li>• Present report to Scrutiny and Executive August 2013 (was May)</li> </ul>	<ul style="list-style-type: none"> <li>• All offers received March &amp; site options evaluations completed April</li> <li>• Members briefing 7th May 2013</li> <li>• Revised bid received July 2013.</li> </ul>	<p>Risk – All offers subject to negotiation which could affect business case.</p> <p>Risk – Cost implications and need for asset management plan to be developed if decision made to not relocate.</p> <p>Risk – Bidders may retract offers if decisions are not timely.</p> <p>Risk – Other potential sites may be identified which will effect timescales of project.</p>
4.5	Southwest One Review	A	New	<ul style="list-style-type: none"> <li>• Approval will be sought via Scrutiny and Full Council prior to any decisions being made.</li> </ul>	<ul style="list-style-type: none"> <li>• Project team formed</li> <li>• Governance arrangements in place.</li> </ul>	<p>Issue - Currently in commercial discussions with Southwest One, this is taking longer than anticipated.</p> <p>Key Risk - Negative impact on staff if procedures are not correctly followed/poor and untimely communications.</p>

Ref	OBJECTIVES	MEASURES	Alert	Trend	Performance data & comments (Key risks/issues/achievements)	Portfolio
<b>SECTION 2) MANAGING FINANCES</b>						
5.1	<b>Budget monitoring</b> To control spending within approved budget total for the year	<b>a) General Fund Revenue</b> within 1% = ☺ 1 – 2% = ☹ over 2% = ☹	A	NA	At the end of June 2013, the Council's net outturn for General Fund services based upon current trends is <b>predicted to be £149k (1.1%) above budgeted levels</b> . This variance is due to a range of factors as outlined within the report. Regular monitoring processes are in place, and appropriate actions will be determined and implemented as required. (For detail see Section 2 of main report)	Corp Resources
		<b>b) General Fund Capital</b> within 2% = ☺ 2 – 3.5% = ☹ over 3.5% = ☹	G	NA	Spending within the General Fund capital programme is at budgeted levels (For detail see Section 2 of main report)	Corp Resources
		<b>c) Housing Revenue (HRA)</b> within 0.5% = ☺ 0.5 – 2% = ☹ over 2% = ☹	G	NA	There are a number of significant variances from both planned levels of income and expenditure. However, when these are netted together the actual predicted outturn after the first quarter, is that the HRA is operating within overall budgeted parameters (For detail see Section 2 of main report).	Corp Resources
		<b>d) HRA Capital</b> within 2% = ☺ 2 – 3.5% = ☹ over 3.5% = ☹	G	NA	Spending within the HRA capital programme is low at the end of quarter 1, but in line within the anticipated spending profile (For detail see Section 2 of main report).	Corp Resources
		<b>e) Council Tax Support</b> within £25k = ☺ £25k-£50k = ☹ over £50k = ☹	G	NA	Spend remains below budget at this time with new claims being made daily as expected. Caseload is steady Expenditure for LCTS is under budget by £134k The net adjustment figure for CTB is £17k in the Council's favour - i.e. we have identified more overpayments of CTB than underpayments for periods before 31/3/2013 - all of which are recoverable and we get to keep all that we collect (or at least 10% of it as the remainder will go to other preceptors)	Corp Resources

Ref	OBJECTIVES	MEASURES	Alert	Trend	Performance data & comments (Key risks/issues/achievements)	Portfolio
		<b>f) Business Rates</b> Net rate yield	<b>G</b>	na	The yield remains consistent each month and the forecast appears to be robust at this time. Work continues to integrate the numbers making sure we understand all positive and negative activities that affect Business Rates.	Corp Resources
<b>5.2</b>	<b>Reserves</b> To maintain an adequate reserve (based on financial risk analysis)	<b>General Fund reserve</b> >£1.25m = 😊 £1 - £1.25m = 😐 <£1m = ☹️	<b>G</b>	na	The opening General Fund reserve balance as at the 1 April 2013 of £3,943k, has been significantly reduced by subsequent allocations including £1,500k to the Blackbrook Swimming Pool project. The revised balance of £2,333k would be further reduced by £185k if the current year predicted outturn proved to be accurate, although the <b>residual balance of £2,148k</b> would still be above minimum requirement of £1,500k (For detail see Section 2 of main report).	Corp Resources
<b>5.3</b>	<b>Next year's budget gap</b>	A balanced budget 2014/15	<b>A</b>	↓	The Business Plan Project has clarified the vision and high level objectives of the Council; more work is now needed to develop our approach to translating this into our approach to savings targets. This is underway and further reports will be shared at Scrutiny Shortly	Corp Resources
<b>5.4</b>	<b>Debt collection</b>	a) Council Tax Target = 97.8%	<b>A</b>	↓	<b>Actual for Q1 = 34.84%</b> The target for Q1 = 35.29% Slightly behind target. We are monitoring this closely in view of the potential impact of the introduction of local CTS	Corp Resources
		b) NNDR Target = 98.4%	<b>G</b>	↔	<b>Actual for Q1 = 33.97%</b> The target for Q1 = 33.29%	Corp Resources
		c) Housing Rent Target = max arrears £360k)	<b>A</b>	↔	The figure for rent arrears is <b>£391,302</b> . The target for the year is £360K. The estates team are working on rent arrears as a priority in view of the welfare reform and introduction of universal credit next year.	Housing

Ref	OBJECTIVES	MEASURES	Alert	Trend	Performance data & comments (Key risks/issues/achievements)	Portfolio
		d) Sundry Debts position (In SAP only*)	A	↓	<p>There is good progress with the levels of debt in the sundry debtor system. Further work needs to be done on the debt over 90 days as some of the debts may be being paid via instalments.</p> <p><b>As at 1st July 2013 debt = £1.05m</b> As at 1st July last year debt = £2.39m</p> <p><b>As at 1st July 2013 debt over 90 days old = £0.53m</b> As at 1st July last year debt over 90 days old = £1.48m</p>	Corp Resources
5.5	Benefits subsidy	To achieve 100% subsidy	G	↔	<p>On target</p> <p>The lower threshold for TDBC is £153k pa.</p> <p>The predicted outturn is £43k leaving us with a £90k safety net.</p>	Corp Resources
5.6	Procurement Transformation Project Ensure TDBC realises benefits of the various transformation projects	Value of Procurement Savings against target (based on 'loan' repayment figure)	R	↔	<p>Latest released figures from the Procurement Consolidated Update Report are to 31/05/2013. <b>£2.891m of savings initiatives agreed to date of which £1.704m has been delivered.</b></p> <p>The balance is not yet due to be delivered (the remainder will be delivered over future months/years within the lifetime of the SwOne contract).</p>	Corp Resources

### 3. CORPORATE HEALTH (People, Customer Service, & Corporate Governance)

Ref	OBJECTIVES	MEASURES	Alert	Trend	Performance data & comments (Key risks/issues/achievements)	Portfolio
6.1	People	a) Staff sickness	G	↑	<b>Target = 8.5 max working days lost per FT employee</b> <b>Quarter 1 actual = 2.02 days</b> Qtr1 last year was 2.13 days, with the year-end outturn result being 10.48 days, therefore although this first quarter report is encouraging we should remember that the first half of the year generally sees lower sickness absence	Corp Resources
		b) Staff Turnover	G	↔	<b>Target - 12% (voluntary leavers as % of staff in post)</b>  <b>Total turnover for Q1 = 2.63%</b> Voluntary turnover for Q1 = 1.75%	Corp Resources
6.2	<b>Delivering customer driven services</b> To deliver customer focussed services, achieving high levels of customer satisfaction.	a) Calls resolved at 1 <sup>st</sup> point of contact	G	↔	<b>Target - for Contact Centre 92 %.</b> <b>Quarter 1 actual = 97.24%</b> Total for Year = 97.24% (Qtr 1 last Year = 94.37%)	Corp Resources
		b) Calls answered within 20 seconds	A	↓	<b>Target - for Contact Centre 80 %.</b> <b>Quarter 1 actual = 77.95%</b> Total for Year = 77.95% (Qtr 1 last Year = 81.45%)  7,946 out of 36,042 answered waited longer than 20 seconds - higher than previous activity on Council Tax recovery has led to increased calls into the Contact Centre at peak periods and this is being discussed at present	Corp Resources

		c) Calls abandoned	G	↔	<p><b>Target for Contact Centre &lt;5%. Quarter 1 actual = 3.88%</b> Total for Year = 3.88% (Qtr 1 last Year = 4.16%)</p> <p>1,455 calls out of a total of 37,497 offered abandoned</p>	Corp Resources
		d) Customer Feedback (Complaints & Compliments)	A	↑	<p><b>Target - 100% of complaints responded to within 10 days. 83% complaints being responded to within target 10 days</b> (Qtr1 last year = 65%) Total number of <b>feedback recorded Qtr 1 = 59</b> (Qtr1 last year 2012/13 = 78) Total number <b>complaints Qtr 1 = 30</b> (Qtr1 last year 2012/13 = 29) Total number <b>compliments Qtr 1 = 20</b> (Qtr1 last year 2012/13 = 46) 2012/13 Ombudsman Report = 9 complaints received (National average = 10)</p>	Corp Resources
		e) Freedom of Information (FOI) requests	G	New	<p><b>Target - 75% of queries answered within 20 working days of receipt.</b> <b>81%</b> were answered &amp; closed within 20 working days. Quarter One received = 149 requests.</p>	Corp Resources

6.3	<b>Corporate Governance Action Plan</b> Deliver the action plan, focussing on high priority areas	Deliver 95% of High priority Actions, and 80% of Medium priority actions by target dates	A	↔	The last Corporate Governance committee report was 20th May. <b>High priority actions = 88% (7 out of 8)</b> <b>Medium/Low priority actions = 80% (8 out of 10)</b> 83% (15 of the 18) external audit actions are on-track or now closed. The 2012/13 audit plan was presented to the Corporate Governance committee in June, and Financial Statements & Value for Money conclusion to be reported in September.	Corp Resources
6.4	<b>Audit &amp; Inspection</b> Ensure that statutory Audit & Inspection obligations are met	Internal audit findings	A	↓	2013-14 Internal Audit Work: In relation to quarter one there were ten reviews. The following audit assessments were reported in respect of these audits where complete or draft (draft reports could be subject to change): Green - Comprehensive assurance = 0 Green - Reasonable assurance = 0 Amber - Partial assurance = 1 Red - No assurance = 0 Non-Opinion = 1 Follow-up Audit work = 1  Due to the position in the year an initial assessment at this stage may not be representative. Internal Audit (SWAP) reports quarterly on audit plan progress, assurance levels and priority recommendations to the Corporate Governance Committee (next report due Sept 2013).	Corp Resources
6.5	<b>Equalities &amp; Diversity</b> Ensure compliance with general & specific duties of Equalities Act 2010	Delivery of corporate Equalities action plan	R	New	<b>Target - To deliver all actions by target date.</b> Some key elements of the Corporate Equality Action Plan are yet to be delivered; all elements of the action plan in response to the recent SWAP audit will be delivered by end of year 2013.  <b>Separate Risks/Issues/Impacts appended.</b>	Community Leadership

6.6	<b>Risk Management</b> To ensure major risks are managed by embedding Risk Mgt Strategy	Delivery of RM Strategy & action plan	<b>G</b>	↔	<p>The Corporate Risk Register and status of the corporate risk management action plan was reported to the Corporate Governance committee 24 June 2013. Risk Management processes continues to be implemented at strategic, operational and programme/project levels throughout the Council. CMT review and update the corporate and Theme risk registers as part of quarterly performance reviews (last review 8 May, and next review 31 July). Total of 18 corporate risks: 10 'Red'; 7 'Amber'; 1 'Green' - all Red &amp; Amber risks are being actively managed.</p>	Corp Resources
6.7	<b>Health &amp; Safety</b> To raise the standard of Health & Safety knowledge & performance	Delivery of Corporate H & S Action Plan	<b>A</b>	↓	<p>Compliance audit continues to be undertaken in all Themes. Some additional progress has been made on share point/policy updates. Request for DSE assessors has gone to leads, with training in September. Accident reporting procedure are being reviewed and the H and S Advisor has been consulting UNISON, management and relevant staff with a view to a proposal being considered by the H and S Committee in July 2013. SWAP Audit actions being reviewed as there has been some slippage.</p>	Corp Resources

## GENERAL FUND REVENUE ACCOUNT SUMMARY 2013/14

	Original Budget £k	Current Budget £k	Forecast Outturn £k	Forecast Variance £k	
<b>Service Portfolios</b>					
Community Leadership	1,010	1,013	1,003	(10)	
Corporate Resources	2,165	2,147	2,349	202	
Economic Development, Asset Management, Arts & Tourism	991	1,416	1,466	50	
Environmental Services	4,229	4,291	4,172	(119)	
General Services	1,235	1,367	1,372	5	
69 Housing Services	2,599	2,607	2,594	(13)	
Planning, Transportation & Communications	(1,351)	(1,331)	(1,428)	(97)	
Sports, Parks & Leisure	2,482	2,552	2,582	30	
<b>Net Cost of Services</b>	<b>13,360</b>	<b>14,062</b>	<b>14,110</b>	<b>48</b>	<b>(0.3%)</b>
<b>Other Operating Costs and Income</b>					
Deane Helpline Trading Account	65	69	194	125	
DLO Trading Account	(101)	(101)	(93)	8	
Interest Payable and Debt Management Costs	0	0	0	0	
Interest and Investment Income	(318)	(318)	(318)	0	
Local Services Support Grant	0	0	0	0	
Parish Precepts & Special Expenses	569	521	521	0	
Capital Expenditure Funded from Revenue (RCCO)	525	529	529	0	
Repayment of Capital Borrowing (MRP)	453	453	421	(32)	
Transfers to Capital Adjustment Account	(2,537)	(2,537)	(2,537)	0	
Transfer to/(from) Earmarked Reserves	1,171	587	587	0	
Transfer to/(from) General Reserves	0	(1,610)	(1,610)	0	
<b>Total Other Costs and Income</b>	<b>(173)</b>	<b>(2,407)</b>	<b>(2,306)</b>	<b>101</b>	<b>(4.2%)</b>
<b>NET EXPENDITURE BUDGET BEFORE FUNDING</b>	<b>13,187</b>	<b>11,655</b>	<b>11,804</b>	<b>149</b>	<b>(1.1%)</b>
Formula Grant and Council Tax Income	(11,403)	(11,403)	(11,403)	0	
Council Tax Freeze Grant	(57)	(57)	(57)	0	
New Homes Bonus Grant	(1,727)	(1,747)	(1,747)	0	
<b>Projected (Under)/Overspend for the Year</b>	<b>0</b>	<b>(1,552)</b>	<b>(1,403)</b>	<b>149</b>	

**ANNEX B**

**GENERAL FUND REVENUE ACCOUNT FORECAST VARIANCES TO BUDGET 2013/14**

	Port - folio	Cost Centre Description	Forecast Variance Updates				Variance explanation	Management Action
			Q1 £k	Q3 £k	Q4 £k	Total £k		
3	PTC	Building Control – Fee earning Account	35			35	The variance of £35k has arisen because of reduced fee income caused by the continued economic down turn. It is however, offset by savings elsewhere in the service identified as set out in 4 below.	Budget holder will review on a monthly basis.
4	PTC	Building Control – Staffing	(82)			(82)	The underspend is due in part to the fact that a vacant post will not be filled. Additional income has also arisen from a new working arrangement with Sedgemoor DC; and savings have been made on third party payments to the same authority.	Budget holder will review on a monthly basis.
6	OTH	Deane Helpline	125			125	There are a number of factors which have led to a projected overspend. £19k of computer licensing costs were not been budgeted for, and were previously included within ICT recharges. Furthermore, £30k of expenditure on equipment necessary for the operation of the service was not approved within the capital programme, and has been charged to revenue. £22k has arisen through additional staffing costs, although a reduction in the total hours worked is being used to mitigate this expenditure. Finally, the loss of major contract income (£53k) has severely impacted the service.	An external review will begin shortly to identify ways of reducing the Council's future financial commitment.
7	COR	Rent Allowances	160			160	This is a demand led service and the fluctuations in the number of people claiming benefit is outside of TDBC control. Due to the poor state of the economy and cuts in welfare benefits, customer's ability to repay overpaid benefit is severely compromised and consequently, despite best efforts, recovery rates have deteriorated.	Budget holder will review on a monthly basis.
8	COR	Rent Rebates to HRA	58			58	The factors influencing this service are the same as those set out for Rent Allowances above. It is anticipated that the full year impact on the budget will lead to an adverse variance of £58k.	Budget holder will review on a monthly basis.

	Port - folio	Cost Centre Description	Forecast Variance Updates				Variance explanation	Management Action
			Q1 £k	Q3 £k	Q4 £k	Total £k		
9	ENV	Somerset Waste Partnership	(92)			(92)	The overall results from an £80k increase in garden waste fees; and from a £51k underspend relating to contract fee amendments. A slight underspend on contract charges is also anticipated in the current year. £40k of this underspend can be used to offset the anticipated overspend on the waste recycling budget.	Budget holder will review on a monthly basis.
10	HSG	Housing Advice	(28)			(28)	An underspend arising from staff vacancies within Housing Options, and from savings due to a member of staff being on maternity leave.	Budget holder will review on a monthly basis.
12	PTC	Development Control Advice	(21)			(21)	There is a positive variance as a result of an increase in fee income relating to applications and pre - application advice.	Budget holder will review on a monthly basis.
13	PTC	Dealing with Applications	(42)			(42)	There is a positive variance due to increased income resulting from a number of high value applications.	Budget holder will review on a monthly basis.
		Various minor variances	21			21	Net of other minor variances	Budget holders will review on a monthly basis.
	OTH	MRP (repayment of debt)	15			15	An anticipated full year reduction in debt repayment.	No further action.
		<b>GRAND TOTAL</b>	<b>149</b>			<b>149</b>		

Note: Variances below £20k have been excluded.

Key: Portfolios

COM	Community Leadership
COR	Corporate Resources
ECD	Economic Development, Asset Management, Arts & Tourism
ENV	Environmental Services
GEN	General Services
HSG	Housing Services (Non-HRA)
PTC	Planning and Transportation/Communications
SPL	Sports, Parks & Leisure
OTH	Other Central Costs and Income

**ANNEX C****GENERAL FUND RESERVES SUMMARY 2013/14**

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	£k	Current Budget & Forecast £k
Balance Brought Forward 1 April 2013		3,943
Supplementary Estimates		
Blackbrook Swimming Pool (Approved May 2013)	(1,500)	
Customer Access and Accommodation Project (Approved May 2013)	(70)	
Asset Strategy Project	(40)	
		<u>(1,610)</u>
Budgeted Balance March 2014		2,333
Projected Outturn 2013/14		(149)
Projected Balance Carried Forward 31 March 2014		<u>2,184</u>

## HOUSING REVENUE ACCOUNT SUMMARY 2013/14

	Original Budget £'000	Current Budget £'000	Forecast Outturn £'000	Forecast Variance £'000	Forecast Variance %
<b>Income</b>					
Dwelling Rents	(19,419)	(19,419)	(19,645)	(226)	1%
Non Dwelling Rents	(588)	(588)	(575)	13	-2%
Supported, Sheltered & Extra Care	(4,335)	(4,335)	(4,428)	(93)	2%
Other Income (Service Charges, Rechargeable Repairs, Leaseholder Charges and GF Contribution)	(609)	(609)	(586)	23	-4%
<b>Total Income</b>	<b>(24,951)</b>	<b>(24,951)</b>	<b>(25,234)</b>	<b>(283)</b>	<b>1%</b>
<b>Expenditure</b>					
Supervision & Management	5,380	5,380	5,348	(32)	-1%
Maintenance	5,152	5,152	5,933	781	15%
Capital Charges - Depreciation	6,385	6,385	6,385	0	0%
RCCO	550	550	550	0	0%
Procurement Savings	382	382	382	0	0%
Provision for Bad Debt (budget currently within rents)	0	0	(330)	(330)	0%
Debt Management Expenses	8	8	8	0	0%
Other Expenditure (Communal and Rechargeable Costs, Insurance Excess, and Tenants Forum)	879	879	743	(136)	-15%
<b>Total Expenditure</b>	<b>18,736</b>	<b>18,736</b>	<b>19,019</b>	<b>283</b>	<b>2%</b>
<b>Other Costs &amp; Income</b>					
CDC Costs	220	220	220	0	0%
Interest Payable	2,937	2,937	2,937	0	0%
Interest and Investment Income	(35)	(35)	(35)	0	0%
Provision for Repayment of Debt	2,293	2,293	2,293	0	0%
Social Housing Development Fund	800	800	800	0	0%
Transfers To/(From) Earmarked & Other Reserves	0	0	0	0	0%
<b>Total Other Costs &amp; Income</b>	<b>6,215</b>	<b>6,215</b>	<b>6,215</b>	<b>0</b>	<b>0%</b>
<b>NET (SUPLUS)/DEFICIT FOR THE YEAR</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0%</b>

## ANNEX E

### HOUSING REVENUE ACCOUNT FORECAST VARIANCES TO BUDGET 2013/14

	Cost Centre Description	Forecast Variances Updates				Variance explanation	Management Action
		Q1 £k	Q3 £k	Q4 £k	Total £k		
1	Interest Payable	1			1	There is no significant variance to report and actual interest received is at the budgeted level.	No action required.
2	Interest Receivable	(4)			(4)	There is no significant variance to report and actual interest paid is at the budgeted level.	No action required.
3	Income	(283)			(283)	Provision for bad debt was increased in 2013/14 in the business plan due to Welfare Reform. This has led to expected additional rent income of £330k as although Welfare Reform has had an impact it is unlikely to fully hit the HRA in this financial year, which is been highlighted in expenditure below. Prudent budgeting of voids at 2% has also led to additional rent income of £209k against budget.	Budget holder will review on a monthly basis as per the HRA Business Plan.
4	Expenditure	283			283	Expenditure on void properties in Q1 has been much higher than budgeted and current forecasts show an expected spend for the year of £837k over target budget. Further work is being undertaken to establish the causes of this & the management action needed. However it is known that the initial impact of Welfare Reform has increased the number of voids, but the average length has been reduced to 17 days & so rent income has not been adversely affected. The likely capitalisation of much of the asbestos removal spend has led to an expected underspend in revenue of £146k. An underspend of £118k is currently forecasted due to cautious budgeting for insurance claims i.e. works that could be claimed under the insurance policy, but do not meet the excess amount. This forecast will obviously be dependent on works actually needed & so could change throughout the year.	Budget holder will review on a monthly basis as per the HRA Business Plan.
5	Transfer to SHDF	0			0	Any underspend from this years budget will be transferred at the year end.	Consider transfer of any further net underspends at year end
	<b>TOTALS</b>	<b>(3)</b>			<b>(3)</b>		

**ANNEX F****HOUSING REVENUE ACCOUNT RESERVES SUMMARY 2013/14**

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	£k	Current Budget & Forecast £k
Balance Brought Forward 1 April 2013		2,247
Original Budget 2013/14		<u>0</u>
		2,247
Supplementary Estimates		
Creechbarrow Road Project (Approved Exec 6/2/13)	<u>(200)</u>	(200)
Returns		
Surplus Earmarked Reserves	<u>0</u>	0
Budgeted Balance March 2014		<u>2,047</u>
Projected Outturn 2013/14		<u>0</u>
Projected Balance Carried Forward 31 March 2014		<u>2,047</u>

Cost Centre Name	Original	Slippage/ Supplements/ Virements	Current	Actuals	Actuals	Forecast	Slippage	
	Budget		Budget		v	Outturn		
	£	£	£	£	£	£	£	%
<b>Community Leadership</b>								
Swim Pool PV Cells	-	65,000	65,000	-	0.0%	65,000	-	0.0%
<b>Total Community Leadership</b>	<b>-</b>	<b>65,000</b>	<b>65,000</b>	<b>-</b>	<b>0.0%</b>	<b>65,000</b>	<b>-</b>	<b>0.0%</b>
<b>Corporate Resources</b>								
PC Refresh Project	60,000	71,920	131,920	5,483	4.2%	128,000	(3,920)	-3.0%
Members IT Equipment	4,000	4,000	8,000	-	0.0%	8,000	-	0.0%
IT Infrastructure	-	25,400	25,400	-	0.0%	25,400	-	0.0%
SCCC Loan	1,000,000	-	1,000,000	-	0.0%	-	(1,000,000)	-100.0%
Gypsy Site	108,470	-	108,470	-	0.0%	108,470	-	0.0%
<b>Total Corporate Resources</b>	<b>1,172,470</b>	<b>101,320</b>	<b>1,273,790</b>	<b>5,483</b>	<b>0.4%</b>	<b>269,870</b>	<b>(1,003,920)</b>	<b>-78.8%</b>
<b>Environmental Services</b>								
Canal Grant	10,000	-	10,000	-	0.0%	10,000	-	0.0%
Waste Containers	50,000	56,800	106,800	-	0.0%	60,000	(46,800)	-43.8%
Mercury Abatement	-	239,800	239,800	24,390	10.2%	239,800	-	0.0%
<b>Total Environmental Services</b>	<b>60,000</b>	<b>296,600</b>	<b>356,600</b>	<b>24,390</b>	<b>6.8%</b>	<b>309,800</b>	<b>(46,800)</b>	<b>-13.1%</b>
<b>Housing Services</b>								
Private Sector HandS	-	-	-	(1,380)	-	-	-	-
Energy Efficiency	-	30,000	30,000	-	0.0%	30,000	-	0.0%
Landlord Acc Scheme	-	46,000	46,000	-	0.0%	46,000	-	0.0%
Wessex HI Loans	-	10,440	10,440	-	0.0%	10,440	-	0.0%
DFGs Private Sector	287,000	391,260	678,260	(77,245)	-11.4%	670,000	(8,260)	-1.2%
Grants to RSLs	349,090	567,800	916,890	(124,044)	-13.5%	916,890	-	0.0%
Community Alarms	-	3,200	3,200	-	0.0%	3,200	-	0.0%
<b>Total Housing Services</b>	<b>636,090</b>	<b>1,048,700</b>	<b>1,684,790</b>	<b>(202,669)</b>	<b>-12.0%</b>	<b>1,676,530</b>	<b>(8,260)</b>	<b>-0.5%</b>
<b>Ec Dev, Asset Management, Arts &amp; Tourism</b>								
DLO Vehicles	180,000	-	180,000	113,980	63.3%	180,000	-	0.0%
DLO Plant	22,710	-	22,710	-	0.0%	22,710	-	0.0%
PT Longrun Meadow C	-	108,000	108,000	6,935	6.4%	108,000	-	0.0%
PT High Street	-	82,500	82,500	250	0.3%	82,500	-	0.0%
DLO System	-	388,100	388,100	118,700	30.6%	388,100	-	0.0%

## CAPITAL PROGRAMME 2013/14

## ANNEX H

PT Firepool	-	76,700	76,700	-	0.0%	76,700	-	0.0%
PT Castle Green	-	291,900	291,900	135	0.0%	291,900	-	0.0%
PT High St Retail	-	34,600	34,600	-	0.0%	34,600	-	0.0%
PT Urban Growth	-	28,000	28,000	-	0.0%	28,000	-	0.0%
PT Goodlands Gardens	-	-	-	(6,971)		-	-	
PT Coal Orchard	-	10,000	10,000	-	0.0%	10,000	-	0.0%
PT Bus Station	-	3,400	3,400	-	0.0%	3,400	-	0.0%
PT Sineage	-	6,900	6,900	5,160	74.8%	6,900	-	0.0%
<b>Total Ec Dev, Asset Management, Arts &amp; Tourism</b>	<b>202,710</b>	<b>1,030,100</b>	<b>1,232,810</b>	<b>238,189</b>	<b>19.3%</b>	<b>1,232,810</b>	<b>-</b>	<b>0.0%</b>
<b>Planning, Transport &amp; Communications</b>								
Accolaid Upgrade	-	20,000	20,000	-	0.0%	20,000	-	0.0%
Orchard Car Park	503,500	382,500	886,000	-	0.0%	205,000	(681,000)	-76.9%
<b>Total Planning, Transport &amp; Communications</b>	<b>503,500</b>	<b>402,500</b>	<b>906,000</b>	<b>-</b>	<b>0.0%</b>	<b>225,000</b>	<b>(681,000)</b>	<b>-75.2%</b>
<b>Sports Parks and Leisure</b>								
Grants to Clubs Play	46,000	108,300	154,300	3,277	2.1%	154,300	-	0.0%
Grants to Parishes	20,000	32,500	52,500	9,726	18.5%	52,500	-	0.0%
Replace Play Equip	20,000	26,600	46,600	-	0.0%	46,600	-	0.0%
Play Equip Long Run	-	-	-	82		-	-	
Play Equip Greenway	-	-	-	946		-	-	
Fitzhead Tythe Barn	-	-	-	(182)		-	-	
Popham Hall	-	-	-	(7,788)		-	-	
Lambrook Green	-	-	-	-		-	-	
Wellington Pavilion	-	252,400	252,400	153,658	60.9%	252,400	-	0.0%
Station Road Swimming Pool	1,270,000	-	1,270,000	-	0.0%	1,270,000	-	0.0%
Wellington Skate Park	-	62,000	62,000	-	0.0%	62,000	-	0.0%
Wellington Sports Centre	-	-	-	-		-	-	
Blackbrook Swimming Pool	-	5,353,000	5,353,000	-	0.0%	250,000	(5,103,000)	-95.3%
<b>Total Sports Parks and Leisure</b>	<b>1,356,000</b>	<b>5,834,800</b>	<b>7,190,800</b>	<b>159,719</b>	<b>2.2%</b>	<b>2,087,800</b>	<b>(5,103,000)</b>	<b>-71.0%</b>
<b>Total GF</b>	<b>3,930,770</b>	<b>8,779,020</b>	<b>12,709,790</b>	<b>225,112</b>	<b>1.8%</b>	<b>5,866,810</b>	<b>(6,842,980)</b>	<b>-53.8%</b>

HRA								
Community Alarms	100,000		103,200	-	0.0%	103,200	-	0.0%
HRA Kitchens	600,000	-	600,000	44,822	7.5%	600,000	-	0.0%
HRA Bathrooms	1,250,000	232,300	1,482,300	(15,082)	-1.0%	1,482,300	-	0.0%
HRA Roofing	1,400,000	-	1,400,000	181,733	13.0%	1,400,000	-	0.0%
HRA Windows	250,000	45,700	295,700	91,687	31.0%	295,700	-	0.0%
HRA Heating Imps	677,800	79,400	757,200	90,813	12.0%	757,200	-	0.0%
HRA Doors	423,600	-	423,600	54,189	12.8%	423,600	-	0.0%
HRA Fire Safety Work	250,000	-	250,000	4,484	1.8%	250,000	-	0.0%
HRA Facias Soffits	600,000	212,500	812,500	85,285	10.5%	812,500	-	0.0%
HRA Heat Pumps	244,200	59,400	303,600	98,162	32.3%	303,600	-	0.0%
HRA IT Development	200,000	-	200,000	29,088	14.5%	200,000	-	0.0%
HRA Door Entry	212,100	-	212,100	73,558	34.7%	212,100	-	0.0%
HRA Aids and Adapts	210,000	-	210,000	17,136	8.2%	210,000	-	0.0%
HRA Soundproofing	-	-	-	138		-	-	
HRA DDA Work	50,000	-	50,000	5,148	10.3%	50,000	-	0.0%
HRA Asbestos Works	258,800	-	258,800	(23,396)	-9.0%	258,800	-	0.0%
HRA Tenants Imps	5,000	-	5,000	5,620	112.4%	5,000	-	0.0%
HRA DFGs	315,000	24,100	339,100	(38,944)	-11.5%	339,100	-	0.0%
HRA Creechbarrow Road	7,667,000	-	7,667,000	73,949	1.0%	1,000,000	(6,667,000)	-87.0%
Sustainable Energy Fund	227,700	-	227,700	-	0.0%	227,700	-	0.0%
Environmental Implications	155,300	-	155,300	-	0.0%	155,300	-	0.0%
Other Ext Insulation	5,100	-	5,100	-	0.0%	5,100	-	0.0%
Garages	50,000	-	50,000	-	0.0%	50,000	-	0.0%
Sewerage Treatment	24,200	-	24,200	-	0.0%	24,200	-	0.0%
Extensions	160,000	-	160,000	-	0.0%	160,000	-	0.0%
Revise Bathroom Location	36,200	-	36,200	-	0.0%	36,200	-	0.0%
HRA Phase 1 Vale View West Bagborough	1,050,000	-	1,050,000	581	0.1%	263,430	(786,570)	-74.9%
HRA Phase 1 Milton Close	1,050,000	-	1,050,000	370	0.0%	-	(1,050,000)	-100.0%
HRA Phase 1 Bacon Drive	1,050,000	-	1,050,000	393	0.0%	15,000	(1,035,000)	-98.6%
HRA Phase 1 Normandy Drive	1,050,000	-	1,050,000	390	0.0%	18,000	(1,032,000)	-98.3%
<b>Total HRA</b>	<b>19,572,000</b>	<b>653,400</b>	<b>20,228,600</b>	<b>780,123</b>	<b>3.9%</b>	<b>9,658,030</b>	<b>(10,570,570)</b>	<b>-52.3%</b>
<b>Total GF &amp; HRA</b>	<b>23,502,770</b>	<b>9,432,420</b>	<b>32,938,390</b>	<b>1,005,235</b>	<b>3.1%</b>	<b>15,524,840</b>	<b>(17,413,550)</b>	<b>-52.9%</b>

## DEANE DLO TRADING ACCOUNT AND RESERVES SUMMARY

	Expenditure Budget £'000	Income Budget £'000	Net Budget £'000	Forecast £'000	Forecast Variance £'000
<b>TRADING ACCOUNT PERFORMANCE 2012/13</b>					
Admin	0	0	0	0	0
Stores	0	0	0	0)	0
Grounds	5,375	(5,441)	(66)	(66)	0
Building	8,737	(8,816)	(79)	(79)	0
Nursery	159	(115)	44	44	0
<b>DLO Net (Surplus) / Deficit</b>	<b>14,271</b>	<b>(14,372)</b>	<b>(101)</b>	<b>(101)</b>	<b>0</b>

**TRADING ACCOUNT RESERVES POSITION****Balance B/F**

138

Forecast movement in year

0

**Estimated Balance C/F****138**

## Notes:

1. These are forecast figures provided by managers from the DLO, and may be subject to change as the year progresses.
2. The stores and admin cost centres are recharged entirely at the year end. Stores profit is split between DLO cost centres leaving a nil balance, and Admin costs are currently split 55.97% to General fund, with the remaining forecast balance to be split between the various DLO cost centres. This method of allocation is currently under review.
3. DLO budgets are currently being re-aligned. Work has been undertaken on the Building and Grounds budgets, but the Nursery budget is still being reviewed. Consequently the forecast in this report may change.

## Key Risks/Issues/Impacts

(for 'Red' and 'Amber' performance issues)

<b>Description of the issues / areas of concern</b>	<p><b>3.2</b> Working with partners to improve the lives of our most vulnerable households.  'Family Focus' (Troubled Families) project</p> <p>Development of a successful working model –delays, risks and issues regarding the identification and engagement of families, and the development of practises, procedures, policies, measures of success and partnerships working.</p>
<b>Risks &amp; impact</b>	<p>Risk to project budget if an insufficient number of families are engaged.  Risk to family outcomes if families are not effectively engaged.  Risk to reputation, partnership working and successful engagement of families if communications are not managed.  Potential for abuse of Budget.  Risk that opportunities to redesign services may be missed.  Ongoing risk to TDBC and partner resources if family outcomes are not achieved.  Only 4 days of internal resource identified to manage project (with 2.5 days of officer support)</p>
<b>Background info - reasons that the issues have emerged</b>	<p>Somerset County Council slow to appoint a programme co-ordinator  TDBC unable to appoint a dedicated Project Manager.</p>
<b>Management actions &amp; CMT comments</b>	<p>Internal TDBC resources identified to manage project from July 2013, however only 4 days per week of resource identified.</p>

## Key issue template

(for 'Red' and 'Amber' performance issues)

<b>Description of the issues / areas of concern</b>	<p>Scorecard (appendix A) ref: Aim 3.4 Objective 8 Fly tip incidents for Q1 have increased over the same period last year; enforcement actions have decreased leading to a reduced score at this stage. The final score will not be assessed until the end of the year.</p>										
<b>Risks &amp; impact</b>	<ul style="list-style-type: none"> <li>• Increased incidents of fly tipping costs the taxpayers money to clear up. Increased numbers of fly tipping incidents are charged to Somerset Waste Partnership on a cost recovery basis, but ultimately this is still funded through tax on the public.</li> <li>• The borough looks worse as a result of fly tipping incidents and although every effort is made to clear incidents quickly with 1.6 incidents occurring each day there is still an aesthetic impact.</li> </ul>										
<b>Background info - reasons that the issues have emerged</b>	<ul style="list-style-type: none"> <li>• Fly tip incidents fluctuate throughout the year.</li> <li>• This quarters incidents of fly tipping are up on the same quarter of last year.</li> </ul> <table data-bbox="512 1245 794 1429"> <tr> <td>2011/12 Q1</td> <td>176</td> </tr> <tr> <td>Total</td> <td>681</td> </tr> <tr> <td>2012/13 Q1</td> <td>144</td> </tr> <tr> <td>Total</td> <td>647</td> </tr> <tr> <td>2013/14 Q1</td> <td>152</td> </tr> </table>	2011/12 Q1	176	Total	681	2012/13 Q1	144	Total	647	2013/14 Q1	152
2011/12 Q1	176										
Total	681										
2012/13 Q1	144										
Total	647										
2013/14 Q1	152										
<b>Management actions &amp; CMT comments</b>	<ul style="list-style-type: none"> <li>• The DLO will continue process reports of fly tipping and remove them as soon as possible, they will also continue to forward on information concerning evidence to the Environmental Protection Team but have no control over enforcement actions.</li> <li>• EPT will continue to pursue enforcement actions where evidence allows.</li> </ul>										

## Key Risks/Issues/Impacts

(for 'Red' and 'Amber' performance issues)

<b>Description of the issues / areas of concern</b>	<p>Ref 6.5 Equalities &amp; Diversity          Ensure compliance with general &amp; specific duties of Equalities Act 2010          Delivery of corporate Equalities action plan</p> <p>Some actions have been completed – publication of equality policies and plans on internet. Equality Action Plans are now being monitored. Service user profiles published . Equality Objectives set.</p>
<b>Risks &amp; impact</b>	<p>Some key elements of the Corporate Equality Action Plan are yet to be delivered.          SWAP audit recommendations have not been completed and a reaudit is due shortly.</p>
<b>Background info - reasons that the issues have emerged</b>	<ul style="list-style-type: none"> <li>• A project to improve and strengthen the EIA process, which will ensure that equality considerations are undertaken during decision/policy making processes, has been delayed due to reallocation of staff resources to major projects.</li> <li>• Robust EIA quality monitoring process is yet to be established.</li> <li>• Arrangements for refresher training have not been made.</li> <li>• Some documents are yet to be published and EIAs are not updated regularly on the TDBC website.</li> <li>• Surgeries/Champions group not established</li> </ul>
<b>Management actions &amp; CMT comments</b>	<ul style="list-style-type: none"> <li>• Corporate Equality Action Plan to be redeveloped to ensure all audit recommendations are met by end 2013 and all legislative duties are met on an ongoing basis.</li> <li>• Direction from DCLG suggest that EIAs are not a legislative requirement and that Local Government Authorities should use proportionate ways to analyse and consider the impact of their decisions on people with protected characteristics.</li> <li>• The completion of a project to improve processes for proportionally considering equality impacts during decision/policy making processes will address many of audit recommendations. The actions are not achievable without establishing new processes.</li> </ul>



## Annex J - Strategy and Performance – 2013/14 Quarter 1 Exception/Highlight Report

Key achievements & successes in quarter
<ul style="list-style-type: none"> <li>▪ LGA Workshop with members to explore savings targets</li> <li>▪ Service Profiles completed of all services for Directors</li> <li>▪ B. Plan completed and close down report drafted</li> <li>▪ Aster Living contract extension agreed with Exec</li> <li>▪ Managing Comms of WSDC Project including new newsletter</li> <li>▪ PR and Comms Champions initiative launched</li> <li>▪ Safeguarding training launched (Leads, Members &amp; team meetings)</li> <li>▪ Recruitment of Family Focus Support Workers, admin and P. Mgr</li> <li>▪ PAS Action Plan agreed for next 12 months with TDP</li> <li>▪ Community Climate Change Strategy drafted</li> <li>▪ 50Kwh Solar PV installed at Blackbrook Pavilion SC</li> <li>▪ New Corporate Scorecard developed to reflect new Business Plan</li> </ul>

Current key issues	RAG
1. Lack of capacity - resolve backfill issues for Dan Webb (Growth Prog Mgt) (3dpw) and Mark Leeman (Family Focus PM) (4dpw) – currently post being advertised	
2. Family Focus Project – generally complex and playing ‘catch up’ with partnership commitment and agreed processes.	

Current key risks	RAG
1. Corporate Governance for the business (budgets, risk, debt, performance mgt etc) – Corporate and Service Risk (Action plan in place)	(16)
2. Equalities – decision makers not fully aware of equalities impacts of decisions – Team will revisit Audit Action Plan (Aug 2013)	(16)
3. Family Focus – various risks – capacity, lack of engagement / partner commitment; information sharing; pace of delivery to meet funding requirements; reputational risk	

Missings/breakdowns
<ul style="list-style-type: none"> <li>▪ None</li> </ul>

Key objectives for next quarter
<ul style="list-style-type: none"> <li>▪ Tighter, more joined up treatment of Programme of projects, including joint Comms newsletter (Sept 2013)</li> <li>▪ Develop a draft Comms Plan for Transformation and Growth programmes (31/7/13)</li> <li>▪ Family Support Workers trained and working with families by Aug 13</li> <li>▪ Benchmarking / VfM Analysis of Council (Aug/Sep 2013)</li> <li>▪ Cyclical performance and risk reporting for Qtr 1.</li> <li>▪ Annual Report (Sept 13)</li> <li>▪ Develop Policy for Social Media (CMT Sept 13)</li> <li>▪ Draft new risk and impact assessment guidance (Sept 13)</li> <li>▪ Safeguarding training completed in org by 15/8/13</li> <li>▪ Greater focus on Equalities weaknesses for SWAP audit (Jul/Aug 13)</li> <li>▪ (Rolled Forward) – develop ‘Gateway’ approach for new projects</li> </ul>

Promises & Requests (outstanding / unresolved from previous review)
<ul style="list-style-type: none"> <li>▪ Capital monitoring undertaken</li> <li>▪ No debt to recover / write off</li> <li>▪ PAS Performance Monitoring went to CMT – 8/7/13</li> <li>▪ Finance variances and earmarked reserves work completed</li> <li>▪ OLA meeting with Customer Contact took place</li> </ul>

**Annex J - Strategy and Performance – 2013/14 Quarter 1 Exception/Highlight Report**

## Legal & Democratic Services – 2013/14 Quarter 1 Exception/Highlight Report

Key achievements & successes in quarter
<ul style="list-style-type: none"> <li>▪ Roy Pinney now in post and is settling in well. I am receiving good reports.</li> <li>▪ CSU kept everything going well despite Tracey's sick leave being longer than envisaged.</li> </ul>

Missings/breakdowns
<ul style="list-style-type: none"> <li>▪ SW1 IT not keeping to deadlines and constantly moving the goalposts.</li> </ul>

Current key issues	RAG
1. PALC implementation	R
2. Civica case management system implementation	R
3.	
4.	
5.	

Key objectives for next quarter
<ul style="list-style-type: none"> <li>▪ PALC to be implemented</li> <li>▪ Implementation dates for CIVICA</li> <li>▪ Handover of Land Charges to Building Control</li> </ul>

Current key risks	RAG
1. PALC implementation	R
2. Individual Registration	G
3. IT	
4.	
5.	

Promises & Requests (outstanding / unresolved from previous review)
<ul style="list-style-type: none"> <li>▪ I have assessed the potential for a para-legal to carry out the debt recover role. CMT were requested to authorise the extension of Alison Taylor's hours to cover this role but some concern was expressed that this would be sufficient. A further meeting has been requested with Paul Harding to look at this further</li> </ul>

## PLANNING AND DEVELOPMENT – 2013/14 Quarter 1 Exception/Highlight Report

Key achievements & successes in quarter
<ul style="list-style-type: none"> <li>▪ CIL Examination – evidence prepared and date set</li> <li>▪ CIL Regulation 123 List – draft prepared</li> <li>▪ Site Allocation and Development Management Plan – analysed and working towards preferred option</li> <li>▪ Planning Policy team resources support in the successful installation of Blackbrook Photovoltaic units</li> <li>▪ Employment monitoring work completed</li> <li>▪ Sandhill planning application – Planning Committee resolved to grant planning permission</li> <li>▪ Successful bid to the CLG for Largescale Development Capacity Funding – Monkton Heathfield £500k</li> <li>▪ Affordable Housing Open Day attracted over 300 members of the public</li> </ul>

Current key issues	RAG
1. Failure to delivery 700 new homes	☹
2. Failure to achieve major application planning target of 60% of the applications determined within 13 weeks	☹
3. Toneworks – Lack of solution in light of Fox Brothers looking to relocate elsewhere within Wellington	☹

Current key risks	RAG
1. Failure to resolve Western Relief Road (WRR) issue delays delivery of urban extension	☺
2. CIL viability and prioritisation issues result in failure to pass examination	☺
3. No supply or Gypsy and Traveller sites and limited options to remedy	☹

4. Failure to maintain five year supply of sites	☺
5. Delay in delivering Local Development Scheme due to lack of long term funding of key posts in Planning Policy team	☺
6. Failure to pick up legislative changes and have resources available to implement changes safely	☺
7. Implications of 26 weeks planning fee refund proposed legislation on income and staff resource	☺

Missings/breakdowns
<ul style="list-style-type: none"> <li>▪ Political awareness of key planning issues</li> </ul>

Key objectives for next quarter
<ul style="list-style-type: none"> <li>▪ Agree budget plan for the use of the CLG for Largescale Development Capacity grant</li> <li>▪ Agree way forward on Tone Works</li> <li>▪ Bringing forward more affordable sites and secure funding</li> <li>▪ CIL Examination – complete</li> <li>▪ Draft publication of Climate Change and Resilience strategy</li> <li>▪ Local Requirement for validation of planning applications adopted</li> <li>▪ Planning Application for Parmin Close development registered</li> <li>▪ Progress site allocation document</li> <li>▪ Publication of Greenhouse Gas report</li> <li>▪ Publication of Householder report</li> <li>▪ Publication of Retail and Leisure monitoring report</li> <li>▪ Respond to funding announcement and bring forward more affordable housing sites</li> <li>▪ Ruskin Close development complete and official opening</li> <li>▪ Substantive progress on WRR issue</li> <li>▪ To achieve major application planning target of 60% of the applications determined within 13 weeks</li> </ul>

## PLANNING AND DEVELOPMENT – 2013/14 Quarter 1 Exception/Highlight Report

- Work commence on site at Victoria Gate development

### Promises & Requests (outstanding / unresolved from previous review)

None

## Annex J - Community and Commercial Services Theme 3 – 2013/14 Quarter 1 Exception/Highlight Report

Key achievements & successes in quarter
<ul style="list-style-type: none"> <li>▪ Improvements in job completion data processing have lead to increased performance against targets measures Moving two of the four reports from red to green</li> <li>▪ Cross Authority working group in place to consider building control options</li> <li>▪ Void property turn around at its fastest at 17days against a target of 21 days</li> <li>▪ DLO budgets have been re written for more transparency</li> <li>▪ Overall debt position is considerably improved, last year was £315k this year £115k.</li> <li>▪ Transition of Tone responsibilities to Theme 3</li> <li>▪ Contract with Capita signed off</li> <li>▪ Get phase one of mobile working in place with device selection</li> <li>▪ Building control budget has been balanced for 13/14</li> </ul>

Current key issues	RAG
1. Improved performance P1 jobs target 98%	95.74
2. Improved performance P2 jobs target 94%	88.52
3. Improved performance P3 jobs target 85%	90.85
4. Improved performance P4 jobs target 85%	93.40
5. Fly tip waste removals within 5 days	72%

Current key risks	RAG
1. Building Control service delivery and plans checking target	
2. Sickness	
3. Inter company debt	
4. ICT PALC system installation	

Missings/breakdowns
<ul style="list-style-type: none"> <li>▪ Awaiting finance to apply the revised budgets</li> <li>▪ Equalities training for lead officer level has not yet been delivered</li> </ul>

Key objectives for next quarter
<ul style="list-style-type: none"> <li>▪ Work with finance on report for direct charging process</li> <li>▪ Member report on depot relocation</li> <li>▪ Procurement activity for Station Rd refit</li> <li>▪ Recruitment to various vacant posts within theme</li> <li>▪ Split out DLO figures for void property completion</li> <li>▪ Transfer land charges to building control</li> </ul>

Promises & Requests (outstanding / unresolved from previous review)
None

**Annex J - Community and Commercial Services Theme 3 – 2013/14 Quarter 1 Exception/Highlight Report**

## Annex J - Health & Housing Theme – 2013/14 Quarter 1 Exception/Highlight Report

Key achievements & successes in quarter
<ul style="list-style-type: none"> <li>▪ Creechbarrow Planning Application submitted.</li> <li>▪ Creechbarrow Committee Report and scheme widespread congratulations and approval. Stephen Major - a star.</li> <li>▪ Creechbarrow site assembly (decants and buy backs) – Rosie Reed – another star.</li> <li>▪ Gas servicing performance – 100%..but one to watch – Steve Esau</li> <li>▪ Voids Performance 17 days – Paul Hadley and team performance management culture! Also to note efforts of Housing Property Maintenance Team and DLO voids team.</li> <li>▪ Progress on 3 acquisitions – business case</li> <li>▪ Corporate H&amp;S Service – Catrin Brown/Kate Woollard</li> <li>▪ SW1 Asset Management Clienting – Tim Childs</li> <li>▪ Deane Helpline review gone live and staff comms.</li> </ul>

Current key issues	RAG
1. No Passivhaus scheme yet, looking for an alternate site	☹️
2. One Team relationship and projects	☹️
3. Making Halcon Hub work	😊
4. Repairs Performance	☹️
5. Stephen Major resignation	☹️
6. Asbestos incident - void property	☹️

Current key risks	RAG
1. Auditor objection to Licensing fees – Risk of JR	😊

Current key risks	RAG
2. Auditor objection to Licensing fees – Risk of JR	😊
3. M5 costs awarded against – seeking clarification from CPS	😊
4. Compliance matters on Housing Assets – Gas Safety, Asbestos and Electrical Testing.	😊
5. Creechbarrow has deflected capacity from other new HRA capital projects e.g. extensions, works on estates (mobility scooter stores, parking spaces) which are going to slip.	☹️
6. Right to Buy receipts; spend on time, 18 sales so far this financial year. Initiated acquisition and discussions via Affordable Housing Partnership re: possible routes of eligible spend via RP's.	😊

Key objectives for next quarter
<ul style="list-style-type: none"> <li>▪ Identify and implement schedule of rates</li> <li>▪ Evaluate Asset Management Database purchased by DLO in terms of suitability for Housing Assets.</li> <li>▪ Firm up thinking on Housing Property/development structure.</li> <li>▪ Development Team recruitment</li> <li>▪ Creechbarrow contractor procurement</li> <li>▪ Further consultation on contentious phase 1 sites at Normandy and Bacon Drive – schemes substantially reduced following first consultation.</li> <li>▪ Initiate next HRA business plan review</li> <li>▪ Progress SWPSHP review</li> </ul>

Promises & Requests (outstanding / unresolved from previous review)
<ul style="list-style-type: none"> <li>▪ To meet Claire O'B re 'customer contact' learning &amp; improvement ideas for Housing (eg repairs line)</li> </ul>

## **Annex J - Health & Housing Theme – 2013/14 Quarter 1 Exception/Highlight Report**

## Southwest One services – 2013/14 Quarter 1 Exception/Highlight Report

Key achievements & successes in quarter
<ul style="list-style-type: none"> <li>▪ Regular Innovation Forums progressing – improvements to Procure to Pay process, using lean thinking – SAP RFS process next</li> <li>▪ Business case for Customer Services new telephony approved, implementation started; Knowlagent implemented</li> <li>▪ E-invoicing set up</li> <li>▪ PC/server refresh programme started, Windows 7 project start up</li> <li>▪ ICT Helpdesk relocation and consolidation</li> </ul>

Current key issues	RAG
1. Planning for future service delivery post transfer of P&FM services to SCC and ASC	A
2. Procurement savings target	R
3. Sickness levels	R
4.	

Current key risks	RAG
1. Ensuring stability of services affected by transfer back of P&FM services into SCC	A
2.	
3.	
4.	

Missings/breakdowns

Key objectives for next quarter
<p><b>Customer services:</b> New Telephony Platform; Automation; OpenSpan Multi-skilling - DH Phase 3, use of Knowlagent tool</p> <p><b>P&amp;FM</b> Progressing implementation of “Atrium” property management system</p> <p><b>Finance</b> Improving overall P2P process through innovation workshops, using lean system thinking Electronic invoicing Improving financial management info on SAP</p> <p><b>HR</b> Cross cutting helpdesk project RTI information (HMRC); Auto enrolment – pensions; sickness absence Improved use of on line forms</p> <p><b>ICT</b> Server refresh programme completion Windows 7 start up progression Helpdesk relocation/consolidation and improvement DLO Infrastructure project on track for Sept installation</p>

Promises & Requests (outstanding / unresolved from previous review)
<ul style="list-style-type: none"> <li>▪</li> </ul>

# Taunton Deane Borough Council

**Executive – 9 October 2013**

## **Somerset Flooding Summit – Draft Final Report**

### **Report of the Civil Contingencies Manager**

(This matter is the responsibility of Executive Councillor Ken Hayward)

#### **1. Executive Summary**

To present the draft final report of the Somerset Flooding Summit for consideration by the Executive.
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#### **2. Background**

The attached report outlines the process undertaken and the subsequent conclusions reached by the Countywide Joint Scrutiny review. Councillors Simon Coles and Gill Slattery represented Taunton Deane on the Joint Steering Group.

This exercise was never about ‘solving’ the issue of flooding in Somerset; this has been and continues to be the subject of detailed and complex discussions at many levels. Instead, the Summit was an opportunity for Somerset residents, local agencies and the business community to come together and share experiences and suggestions for improved water management across Somerset. It was very much an evidence gathering exercise and the recommendations contained in the report reflect the information gathered as part of this Scrutiny process.

When this report has been considered by all 6 Somerset authorities, the Joint Steering Group will meet again to collate the responses and finalise the action plan and future monitoring arrangements. The Action Plan will identify for each recommendation, the following:

- Proposed Action
- Who is responsible for the Action
- The Desired Outcome
- The Resources required to deliver the Outcome
- Target Date for Delivery

The Somerset Leaders and Chief Executives have informally considered the report and their broad support is shown in **Appendix D**, along with the minutes from other Council Scrutiny meetings in **Appendix E**.

### **3. Recommendations**

The Executive is recommended to accept the contents of the Somerset Flooding Summit draft report.

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Appendix A - Draft Somerset Flooding Summit Report  
Appendix B - Flooding Summit Meeting Etiquette  
Appendix C - Feedback from Flooding Summit Workshops  
Appendix D – Somerset Strategic Leaders  
Appendix E – Other Council Scrutiny Meeting Minutes

# Somerset Flooding Summit

**A Summary of Findings from the Somerset Flooding Scrutiny Event**

**May 2013**

DRAFT

**Chairman's Introduction**

## Introduction

Somerset suffered two particularly bad periods of flooding in April and December 2012. The flooding affected all areas of the County, with the Somerset Levels and Moors perhaps bearing the brunt.

In the weeks immediately following the December floods, it became apparent that various local groups and agencies were keen to hold meetings with key bodies such as the Environment Agency (EA) and the County Council (SCC) to explore the issues around flood prevention, flood management and flood recovery.

It was quickly realised that those key agencies would struggle to attend numerous meetings on the same topic and that such an approach would not represent an effective use of already limited resources. It was therefore agreed to establish a joint countywide Scrutiny approach that would bring as many of the key people together at the same time in the same place.

In this way, Scrutiny played a crucial community leadership role in bringing together a range of agencies and the public in order to deliver real and measurable outcomes that would in time benefit the residents of Somerset.

All the Somerset authorities (both district and County) agreed to this joint approach and established a Joint Steering Group with elected member representation from all 6 authorities. Conducting the review in this manner represented the best use of limited Scrutiny resources and provided the relevant agencies and the public with a single point of contact. By joining together, it was hoped that Somerset would be able to speak cohesively and convincingly at a national level and input more effectively into any subsequent national reviews which may occur in the aftermath of the recent floods.

As a Steering Group we decided that an evidence gathering event would be a good starting point for this project – they therefore planned the Somerset Flooding Summit 2013. The Summit was designed to learn lessons from the recent flooding and identify potential measures to improve things in the future. By its very nature, much flood management work can only be a paper or simulated exercise so when faced with a real time event, it makes sense to review the effectiveness of the relevant policies and practices.

From the outset, we have been very clear on two important points:

Firstly, this exercise was not about apportioning blame to any one agency for their perceived role in the flooding incidents. The process planned to look at success stories as well as areas for future improvement. The Steering Group wished to use the Summit as an opportunity to gather evidence upon which to base further work or recommendations and to build an informed picture as possible of the flooding facts affecting Somerset.

Secondly, the Steering Group had realistic expectations as to what could be achieved by one event on one day – the members were aware that they would not and could not answer all the points raised, but that the Summit was the start of the process and would provide an evidential framework for further work.

This report sets out areas for further work as well as some specific recommendations for improvements in all aspects of flood management in Somerset.

## The Somerset Flooding Summit

The Flooding Summit was intended to be the start of the review process – an evidence gathering opportunity. To this end, from the outset, the Steering Group was keen to ensure that a wide range of delegates were invited to attend, and that the event should not be ‘local authority centric’.

There were several key agencies whose attendance was vital to the success of the event:

- Environment Agency;
- Somerset County Council as Lead Flood Authority ( as well as Highways authority and Lead
- Civil Contingencies authority)
- Internal Drainage Board
- Wessex Water
- Avon and Somerset Police
- Devon and Somerset Fire and Rescue
- County Landowners Association

These agencies were approached first, and the premise of the Summit explained to them – without exception they were all happy to participate, quickly realising the potential of such a jointly organised event to maximise the use of their resources. Once these key agencies had agreed to attend, we were able to look at the wider delegate list and the following confirmed their attendance:

- Jeremy Browne MP
- Tessa Munt MP
- Ian Liddell-Grainger MP
- Somerset Chamber of Commerce
- Federation of Small Businesses
- Insurance Industry
- National Farmers Union

In addition to these agencies, we recognised the need to involve members of the community and Parish Councils. However, we also realised the need to keep numbers attending manageable. In terms of public engagement, each local authority issued a press release outlining the aims and objectives of the review and inviting members of the public to contact us via a dedicated [flooding@southsomerset.gov.uk](mailto:flooding@southsomerset.gov.uk) e-mail address. They were asked to detail their personal flooding experiences as well as suggestions for future improvements – we received over 150 responses and undertook to keep all responders informed of progress.

All responses were collated and analysed and the key messages used to inform the Summit Programme.

Somerset as a county has hundreds of Parish Councils, all of whom make a valuable contribution to local democracy and many of whom were affected by the flooding.

However, it simply was not logistically practical for each parish to be represented at the Summit, so it was agreed that each district would nominate the five most appropriate parishes from their area to attend – these parishes were identified based on local intelligence.

We were aware that many of these agencies and individuals had significant pressure on their resources and so wanted to make sure that the Summit was the best use of their time. In advance of the Summit, each delegate was asked to identify the top five issues they would wish the Summit to address – their responses were collated and used as basis for the Summit Programme in addition to the public responses identified in the paragraph above.

Overwhelmingly, the majority of delegates identified the need for clarification on the roles and responsibilities of all the agencies involved in Flood Management. The information we gathered indicated that at a time of crisis it was difficult to know who to contact in various situations.

Bearing this in mind, the morning session of the Summit consisted of a number of presentations covering the key Flood Management roles and responsibilities as well as presentation from the Met Office to give some context. Copies of the presentations will be made available in due course.

The presentations were:

- Robbie Williams - Environment Agency
- Dr Sarah Jackson – Met Office
- Paula Hewitt – Somerset County Council
- Roger Meecham – South Somerset District Council
- Refreshments – served in the main Conference Room
- Nick Stevens – Chief Executive, Somerset Internal Drainage Board
- Paul Oaten – Head of Sewerage Services – Wessex Water
- Graham Clarke – Country Land and Business Association - the Role of Riparian Owners

Prior to the event, we were aware that this was a very emotive subject – understandably so, with many people dramatically affected. However, we wanted to make sure that the Summit was a productive event, looking to learn lessons for the future rather than attribute blame. To help facilitate this, we were very fortunate in securing the services of Lord Cameron of Dillington as an independent Chairman. In addition, we agreed to include a Meeting Etiquette Guide in the Delegate pack (attached at Appendix B to this report) to reinforce the positive intentions of the Somerset Flooding Summit.

The afternoon session of the Summit consisted of four workshops- each one designed to address the issues raised by delegates in advance. Each delegate was assigned to a workshop based on the information they provided beforehand.

In order to try and maintain a focus to the discussions, each workshop was asked to identify at least one local (Somerset level) action to address the issues raised and one national action that can be taken further following the Summit. The workshops were organised as follows and notes from the workshops can be found at Appendix C to this report.

## **Community resilience**

Issues for the workshop to consider:

- What could/ should communities be doing to help themselves?
- What support from other agencies do they need and what is available?
- What examples of 'good' community resilience are available and how can these experiences be shared?

Desired outcomes from this Workshop:

- Delegates are more aware of what they can do to support their own communities
- Better understanding of what support is available to them
- Agencies are aware of what support they need to provide and to communicate with such communities
- At least one local action to move things forward
- At least one higher level action to be taken forward.

## **Economic Impact**

Issues for the workshop to consider:

- What are the issues around the economic impact / business impact / impact on agricultural communities?
- What work is currently going on to investigate the impact of the flooding, including the closure of the A361?
- Are there any suggestions for improvements / actions?
- How can we work with insurers and government to make sure that no premises on the Somerset levels are uninsurable?
- What support is available to support businesses?

Desired outcomes from this workshop:

- What can be done across Somerset to better support businesses in terms of flood recovery?
- What can businesses do for themselves?
- What could be done nationally (i.e. Insurers) to support the economy of Somerset following flooding?
- Consideration of Somerset's vulnerable infrastructure and potential improvements.

## **Flood Management / Prevention**

Issues for this workshop to consider:

- Extension of discussion on roles and responsibilities
- How can everyone work together to achieve tangible outcomes? NO BLAME
- What are the barriers / issues and how can they be overcome?
- Who and how is it decided when to use the pumping station network that already exists?
- In the modelling of the spatial planning, what consideration is given to the

- secondary effect of deliberately flooding premises on the Somerset Levels?
- What funding arrangements are in place to support flood management and are there any potential additional funding streams that could be better exploited? Potential use of CIL funding?
- Tidal exclusion barrier on the River Parrett in Bridgwater
- Gully clearing and maintenance.
- What is the way forward in areas where challenges are particularly severe e.g. Somerset Levels?
- How can we make an effective case to MEP/ DEFRA? Central Government for more adequate funding?
- What are the agreed water management priorities particularly for the levels and moors?
- Role of planning authorities and developing on flood plains
- Water storage for future use
- Scope for Internal Drainage Boards to take on responsibility for dredging / channel clearance on main rivers in places where it would improve land drainage but EA are unable to for whatever reason.

Desired outcomes from this workshop:

- Who is responsible for what in terms of Flood Prevention?
- What can be done at Somerset level to improve Flood Prevention?
- What message(s) need to be communicated on a national level re; Flood prevention.

### **Interagency Working**

Issues for this workshop to consider:

- How can we work better with others in the South West to make important infrastructure more resilient?
- How do we work together to help communities and businesses recover better from flooding?
- How do we make sure that everyone is better informed about their roles and responsibilities – notably Riparian Owners?
- Can we improve how we work together to co-ordinate resources to submit bids for prevention schemes?
- How can we get better at:
  - Sharing information
  - Sharing resources
  - Co-ordinated sandbag response – avoid sandbag postcode lottery
- Simplify flood related communications to the general public
- Greater ability to enable communities and other agencies to close roads to stop vehicles becoming trapped and requiring rescuing / recovery.
- Greater co-ordination of shared information between services prior to events occurring to ensure tactical level receive up to date information during an event.
- Managing public expectations
- Create a shared database of flood defence assets (including maintenance regimes)

Desired outcomes from this workshop:

- What can be done at a Somerset level to improve frontline flood response inter-agency working?
- Potential for a single point of information that everyone feeds into?
- What support is needed nationally to support better inter-agency working?

## Recommendations

In terms of process, the Joint Steering Group is not a formally constituted committee of any of the authorities taking part in this review. Consequently, all recommendations will need endorsing through each authority's own decision making processes. This may appear a rather lengthy and cumbersome process but it is there are no statutory provisions for Joint Scrutiny Committees. That said, many of the recommendations contained in this report suggest further areas of work to ensure that this project is a worthwhile exercise with tangible outcomes. In order to reduce the risk of creating an overly bureaucratic process, we recommend that the Joint Steering Group is retained with its current membership of 2 elected members from each authority. The Steering Group will then agree how best to proceed in terms of monitoring progress against our recommendations and securing the best possible outcomes.

Our recommendations have been formed based on the evidence and information gathered via the Flood Summit. As was intended, the Summit generated a number of areas for further consideration and exploration and consequently a number of these recommendations require further, more detailed work. However, members of the Steering Group are keen to maintain the momentum of this project and are aware that for those affected by flooding issues, a timely response is critical. To this end, the Steering Group have allocated a time frame for each recommendation and the Steering Group will retain an overview of progress against each recommendation.

The outcomes/recommendations fall broadly into two categories; those which can be actioned locally at a Somerset level and those which need to be taken forward at a more national level.

### *Economic Impact and improved infrastructure*

Nationally the emphasis is on the economic case for improved flood management arrangements. Several examples were given at the Flood Summit of the need for improved infrastructure in the County from main roads to main train lines. Delegates at the Summit were informed that SCC are currently preparing a study of the economic impact of the December Flooding – this empirical data will hopefully support the anecdotal evidence given at the Summit of the significant economic impact of the flooding and further support calls for additional flood management funding.

**We recommend that discussions with the Heart of the South West Local Enterprise Partnership (LEP) are initiated to look at the contribution the business community across the region can make to improving the infrastructure - it was not only Somerset that was adversely affected when the mainline train route was compromised by flooding around Curry Moor / Lyng and Burrowbridge and that national bodies such as Network Rail should be actively involved in these solution based discussions.**

**In addition, we recommend that all opportunities to secure Partnership Funding are actively pursued.** In May 2011, DeFRA announced a new approach to funding capital projects that reduce flood risks – Flood and Coastal Erosion Resilience Partnership Funding (Partnership Funding). This policy allows risk management authorities to apply for grant in aid and encourages them to secure funding from other sources. The main purpose behind introducing Partnership funding was to:

- Make sure that investment is not constrained by what government alone can afford to do;
- Increase certainty and transparency over the level of DeFRA funding for each project;
- Leverage further investment towards worthwhile projects;
- Allow a greater level of local ownership and choice;
- Encourage more cost-effective solutions; and
- Better target Defra funding towards areas at significant risk.

We feel that any project to protect and improve Somerset's Infrastructure would meet this criteria.

### *Insurance Industry*

Although the Summit was very well attended by a wide range of bodies, representatives from the insurance industry were notable by their absence – despite repeated requests for them to attend. Many of the agricultural, business and community delegates attending the Summit raised a number of questions relating to securing adequate insurance in the future and the role of the insurance industry in flood prevention work. Due to the importance of this issue, the **Steering Group recommend that further work is undertaken to engage with the Insurance industry both at a county level and nationally.** The Steering Group are aware of the ongoing national discussions between the Government and Insurance industry and would urge the Somerset MPs who attended the Summit to represent the interests of Somerset businesses and communities in these on-going discussions. **At a county level, we recommend that the Insurance Industry are asked to participate in the wider economic impact discussions outlined in recommendation ....of this report.**

### *Media Coverage*

Delegates at the Summit stated that the flooding attracted a significant amount of local and national media coverage, and whilst most of the reporting was an accurate reflection of events, there was some sensationalist coverage which some feel has had a negative economic impact (tourists cancelling bookings because they don't think Somerset is 'open for business' etc.). Additionally, other businesses have said that clients have cancelled orders because of mis-reporting (wedding venues etc.).

The information given to the Steering Group seems to indicate that this issue could be somewhat improved if the number of information sources was reduced. This would naturally occur anyway if the co-ordination of information proposed by the single Somerset Flooding Information Point (see recommendation .....) is introduced. **The Steering Group recommend that a press protocol is devised, advising those dealing with media enquiries how to respond effectively.** Such a protocol would direct all enquires to the single information point to ensure consistent information is

given – this will of course rely on the full commitment of all the relevant agencies to accurately maintain the single information point. In addition to this, all those in contact with the media will be briefed on the need to reinforce positive messages about those areas which remain accessible and the positive steps being taken to actively manage the flooding situation.

### **Lead Flood Authority role and responsibilities.**

The Flooding events of 2012 reminded us that flooding is a serious on-going risk for Somerset Communities. The Flood and Water Management Act 2012 implemented many of the recommendations of the Pitt Review into the 2007 floods. The Act clarified the roles and responsibilities for the management of flooding and introduced some new duties.

The Steering Group recommend that further work is undertaken to fully understand what progress has been made in Somerset towards implementing the full range of duties and responsibilities included in the Act.

One such duty is the preparation of the local flood risk management strategy. Such a strategy should describe the flood risk in an area and set out the actions that will be taken to manage it. Local strategies will help prioritise investment decisions and provide information on how flood risk will be managed. They provide a starting point for Lead Flood Authorities to engage with communities. Guidance from Defra and the Local Government Association states that local strategies are expected to take between 12-18 months to complete. According to the most current Environment Agency data, Somerset County Council's strategy preparations are *'in progress'*.

The Flood and Water Management Act was enacted in October 2010. In a recent letter to all Lead Flood Authorities, the Minister for Natural Environment – Richard Benyon MP, stated that whilst flooding events of 2012 may have diverted some resources away from policy preparation, he would encourage '...Lead Flood Authorities to get your strategies into the public sphere by Autumn 2013 so that communities can see the local arrangements in place for tackling flooding and what they can do to help themselves'.

In terms of funding flood management work -DeFRA figures state that in 2013-14 Somerset as a Lead Flood Authority will receive £461,000 – **we recommend that further work is undertaken to look at how this money is committed and what accountability measures are in place? Also, how is this figure calculated and is it adequate based on the risks /actions identified in the Somerset local flood risk management strategy?**

**We recommend that in order to support the Lead Flood Authority in preparing the necessary strategy and policy documents, drafts are submitted to the Steering Group for consideration at an appropriate stage. This will ensure effective consultation with the constituent district authorities and that the pertinent issues already identified by this review are reflected in the emerging strategies.**

### ***Flood Mapping***

As part of this review of the roles and responsibilities of the Lead Flood authority, **we recommend that the Steering Group considers the information that the Environment Agency and the Lead Flood Authority have been doing to generate a**

**new generation of surface water flood maps for England in compliance with the Flood Risk Regulations 2009.** DeFRA are keen that this information is shared with district authorities to ensure all local knowledge is effectively captured and this can be achieved by reporting through this Steering Group.

### *Dredging*

Prior to the Summit, the Steering Group felt that one issue would perhaps dominate – that of dredging the rivers Parrett and Tone, as there had been a significant amount of coverage of this issue in the local and national media. As mentioned in the main body of this report, great care was taken to ensure that this issue did not overshadow any other equally as pertinent issues. However, on the day of the Summit, the Environment Agency opened their presentation by saying that they appreciated the value of dredging ( a change from their previous stance on this issue) and that now efforts needed to be concentrated on sourcing adequate funding.

The Steering Group are of the opinion that there is no value in looking at the historical reason behind dredging, or lack thereof, but that in order to secure the best outcomes for our communities in the future, we should in effect accept that ‘ we are where we are’.

**To this end, the Steering Group recommend that discussions are had as soon as possible to identify practical and innovative sources of funding.** The Wessex Regional Flood and Coastal Committee has recently identified some funding to ‘kick start’ a dredging fund and this now needs to be built upon. We recommend that all potential partnership funding sources are fully explored and progress is regularly reported to the Steering Group.

As part of the continuation of the Joint Steering Group’s work, **we recommend that further work is carried out to ascertain the exact cost of dredging and realistic funding options. Such discussions would move beyond the more familiar territory of who should pay for dredging to who actually can pay. Discussions on this topic should look at contributions from Statutory Flood Management agencies ( EA, IDB’s, Local authorities etc) as well as the business sector and community enterprises.**

### *Disaggregation of Drainage Levy*

District or Unitary Council’s pay a levy to Internal Drainage Boards (IDB’s), funded from Council Tax. The scale of the levy is determined by the IDB and at present and Councils are obliged to pay this levy.

This aggregation creates difficulty for Council’s, as any increase of IDB levy would need to be funded within the limit of increase permitted to Council Tax without referendum (this limit was formerly imposed by way of a ‘cap’). This issue is compounded where a need exists for Council’s to increase Council Tax for their own requirements.

There is potential that Government may introduce a requirement that IDB’s gain the agreement of Council’s on any proposed increase in the drainage levy, but in reality this would not overcome the difficulties described above, as many Council’s would be reluctant to decline requests from IDB’s for an increase.

It would be preferable for the IDB levy to be disaggregated, and for IDB’s to be

permitted to precept for the funds they require. This would provide a greater degree of transparency for tax payers and enable Council's and IDB's an appropriate degree of financial independence.

### *Somerset recommendations*

More locally, the Steering Group received considerable positive feedback from those attending the event about the presentations given in the morning session of the Summit. As detailed in this report, these presentations outlined the main roles and responsibilities of the key flood management agencies. Feedback from delegates asked if this information could be reproduced in an easy to understand format and made publicly available. In addition, numerous delegates raised concerns that whilst all the information is undoubtedly available, it is hard to know where to find it, especially at a time of crisis.

**We recommend that a single 'Somerset Flooding Website' is created, to be hosted by the Lead Flood Authority to ensure effective consistent advice and information is given across the County.**

### *Community Resilience*

The Community Resilience Workshop was well attended and very positive – delegates were keen to learn what they could do to help their own communities. The Steering Group feel it is important that this enthusiasm and positivity is maintained and **that a higher profile is given to the recently formed Community Resilience in Somerset Project to ensure that as many communities as possible are supported.** Two parishes have already been included in the programme as a result of the Somerset Flood Summit and this could be expanded.

There were a number of issues raised during this workshop that we would like to see addressed as a matter of some urgency. Once answered, the information could usefully form a self- help guide for communities and **we recommend that a further information event is held for Parish Councils and communities, facilitated by Avon and Somerset Police, Devon and Somerset Fire and Rescue and Somerset County Council covering the following points:**

- Public Liability - what can the public be empowered to do in times of flood and how is this achieved ( road closures, flood alleviation etc)
- What resources can be provided to communities – signage etc
- Advice on the use of vehicles in flood water – 4x4 community response vehicles etc
- Definitive information on Road Closures – and what happens if signage is ignored.

Unfortunately, Somerset was not chosen to be part of the DeFRA funded Flood resilience Community Pathfinder Scheme. Participation in this scheme would have addressed many of the issues identified by the Flood Summit. **Every effort must now be made to ensure that the information produced by the thirteen local authorities who were chosen is carefully monitored and appropriately applied to Somerset.**

### *Summary of recommendations*

The Joint Flooding Steering Group recommends that:

1. That the report on the economic impact of the 2012 flooding events is reported to the Steering Group as soon as is practicable.
2. Discussions with the Heart of the South West Local Enterprise Partnership (LEP) are initiated to look at the contribution the business community across the region can make to improving the infrastructure - it was not only Somerset that was adversely affected when the mainline train route was compromised by flooding around Curry Moor / Lyng and Burrowbridge and that national bodies such as Network Rail should be actively involved in these solution based discussions.
3. In addition, we recommend that all opportunities to secure Partnership Funding (under the Defra Flood and Coastal Erosion Resilience Partnership Funding initiative) are actively pursued.
4. That Somerset is actively represented by all agencies, including our MPs in government level discussions to ensure that insurance against flooding remains widely available and affordable and the Insurance industry is encouraged to positively engage in flood management discussions to ensure better flood prevention.
5. That a press protocol is devised, advising those dealing with media enquiries how to respond effectively and to promote the 'Somerset is open for business' message at times of flooding.
6. That in order to support the Lead Flood Authority in preparing the necessary strategy and policy documents as required by the Flood and Water Management Act, drafts of key documents are submitted to the Steering Group for consideration at an appropriate stage. This will ensure effective consultation with the constituent district authorities and that the pertinent issues already identified by this review are reflected in the emerging strategies.
7. That further work is undertaken to look at how the £ 461,000 allocated by Defra to Somerset County Council as a Lead Flood authority money is committed and what accountability measures are in place? Also, how is this figure calculated and is it adequate based on the risks /actions identified in the Somerset local flood risk management strategy?
8. That the Steering Group considers the work that the Environment Agency and the Lead Flood Authority(SCC) have been doing to generate a new generation of surface water flood maps for England in compliance with the Flood Risk Regulations 2009.
9. That discussions are had as soon as possible to identify practical and innovative sources of funding for a renewed programme of dredging in Somerset and that further work is carried out to ascertain the exact cost of dredging and realistic funding options. Such discussions would move beyond the more familiar territory of who should pay for dredging to who actually can pay. Discussions on this topic should look at contributions from Statutory Flood Management agencies ( EA, IDB's, Local authorities ) as well as the business sector and community

enterprises

10. That a single 'Somerset Flooding Website' is created, to be hosted by the Lead Flood Authority to ensure effective consistent advice and information is given across the County.
11. That a higher profile is given to the recently formed Community Resilience in Somerset Project to ensure that it supports as many communities as possible and that the Lead Flood Authority can use the project as a basis for implementing a more sustainable model similar to those operated in other areas such as North Somerset.
12. That a further information event is held for Parish Councils and communities, facilitated by Avon and Somerset Police, Devon and Somerset Fire and Rescue and Somerset County Council covering the following points:
  - Public Liability - what can the public be empowered to do in times of flood and how is this achieved ( road closures, flood alleviation etc)
  - What resources can be provided to communities – signage etc
  - Advice on the use of vehicles in flood water – 4x4 community response vehicles etc
  - Definitive information on Road Closures – and what happens if signage is ignored.
13. That the Lead Flood Authority leads the preparation of a Riparian Owners Information Sheet to be made available to land owners and householders, containing information about Riparian responsibilities and sources of guidance or support.
14. That consideration is given by the Somerset Water Management Partnership (SWMP) to incorporating within its constitution the need for it to take a strategic overview of the issues raised at the Flooding Summit and in this report.

## Meeting Etiquette

The Somerset Flooding Summit Steering Group want to make sure that everyone attending the event have a positive experience. We are aware that many of you are passionate about the very important issues the Summit will cover and we want to make sure that everyone gets an opportunity to make a positive and constructive contribution.

With this in mind, we have drawn up this **Meeting Etiquette** which we ask all delegates to observe:

A meeting is as successful as the positive contributions of its members. These practical steps will ensure everyone gets the most out of the opportunity:

- Meetings are for the benefit of all and no one person has the right to dominate or be disruptive. People should be addressed courteously and should feel comfortable enough to make their contributions;
- Whilst the Chair is finally responsible for managing the meeting, it is everyone's responsibility to make the Chair's job as smooth as possible for the good of all. The Chair will aim to ensure that meeting times are managed well so that everything can run to time. They also need to manage contributions, keep contributors from repeating themselves, and ensure a few individuals do not monopolise the time. This will ensure that equality and courtesy are maintained.
- Everyone should be aware of other people's rights to be treated with courtesy. Nobody should feel bullied or insulted or be verbally attacked. Should anyone disagree with someone else, then there is a friendly and courteous way to disagree;
- Those wishing to speak should signal their intention to the chair and wait to be invited to speak. Before speaking, you should construct the points you wish to make and stick to them, speaking for as short a time as possible without repetition whilst using clear, non-defamatory language. The Chair will need to take firm line with people who speak without waiting for an invitation, but the Chair will also need to be aware of any difficulty, for example sight of hearing impairment.
- The Chair has a duty to stop disruptive practices and can ask those displaying unacceptable behaviour to leave – this would always be a last resort.
- In group discussion, each participant should make space for all others who so wish, to have a chance to contribute.
- Be open to innovation and prepared to learn from others.

**We ask that all those attending today will:**

- Really listen to what people say
- Make any criticisms constructively
- Contribute at least once; and
- Make the most of this opportunity

## Flooding Summit Workshops

### Community Resilience Workshops

The Session began with introductory presentations from the agency representatives present:

#### Devon & Somerset Fire & Rescue

- Community resilience is important as during a large scale flooding event, it is inevitable that agencies may be swamped and in any case can't be everywhere at once.
- Fire & Rescue services have a statutory responsibility with the other 'blue light' agencies to lead during the emergency phase of incidents such as flooding.
- Fire & Rescue services also do everything they can to prevent flooding by seeking to identify risks in the community and enabling communities to assist themselves during the acute phase in particular.
- If risk to life not present, no duty to rescue people from flooding, but in reality fire & rescue services will do everything they can to help.
- Are lobbying Government to provide clarity as to which agency has responsibility for rescuing people from floods.
- Fire & Rescue services are concerned that if homes are cut off by severe flooding, that they may be unable to fulfil their statutory duty.
- Are working with communities on prevention initiatives, by visiting homes they think may be at risk and identifying changes or improvements needed to make people safer, such as homeowners turning electricity off when flooded.

#### Avon & Somerset Police

- As with many agencies, the Police are suffering budget cuts so haven't got the resources to deal with spontaneous flooding events unless it becomes a civil contingencies issue.
- Motorists becoming stuck in floods becoming a drain on resources for the police – considering issuing fines to motorist who do not heed 'road closed' signs.
- Police piloting giving authority to community groups to close roads in cases of flooding.

#### Environment Agency

- The EA are working with communities to help them help themselves by developing community flood warden schemes and flood plans. This work is not restricted to parish councils – can be any suitable community group.

#### Civil Contingencies

- Recognises the crucial role community resilience has to play in coping with serious

flooding events – particularly during the acute phase

- Schemes where Parish Councils help to find accommodation for people displaced by flooding have proven to be successful – would like to try more widely.
- Keen to gather ideas as to equipment / skills communities need in order to become more resilient.

**The session was then opened up to wider discussion, with key points as follows:**

- Clearing timber which has fallen into watercourses or onto highways more quickly could help prevent flooding to homes – there is a problem with this caused by parishes being uncertain where they stand legally on doing this type of work on highways/ivers?
- Vehicles driving through floods too quickly causing bow waves is a problem as this can cause homes to flood – roads need to be closed sooner in order to prevent this?

*(Note: Police added that they can empower people to make enforceable road closure - this was well supported by attendees)*

- Clarification needed on legislation in terms of managing risks associated with community resilience activity.
- Many people get stuck when trying to drive through floods due to underestimating the depth. Could markers be installed on roads to assist drivers in judging the depth of flood waters?
- Gullies being blocked is exacerbating the problem
- Communities recognise that in times of widespread flooding, they are on their own and are keen to develop resilience
- 4x4 vehicles have proven to be essential during serious flooding for getting supplies through to vulnerable people, however, it is important for drivers to be aware of the need to go through floods slowly in order to avoid pushing water over defences (sand bags etc) into people's homes.
- People need to be made aware of the dangers of walking through floods as they
- don't know how deep the water is or may fall down/over submerged obstacles
- Communities need their own supplies to make sandbags rather than relying on DC's

*(Discussion across the group on this issue – question: used sandbags are contaminated, how / where should they be disposed of?)*

- There is often a strong community spirit, but liability is a real fear for people, which can stifle this. Agencies need to give clear advice on this – they either need to devolve greater responsibility to communities or be more responsive.

*(Discussion across the group expressing strong agreement with this statement and expressing dissatisfaction with the poor performance of the County Council for not clearing out drains more regularly.)*

- Somerset County Council are piloting a scheme where GIS equipment is given to parishes for them to pin-point the position of the drains which in their view are of greatest priority for clearing.
- Somerset County Council only clear the drains themselves, not the pipes leading away from the drain *Question: how do we find out who is responsible for the pipes leading away from drains?*
- Parishes need agencies to produce advice sheets 'how to help yourselves' and clear advice on who to go to under various circumstances
- Somerset County Council need to coordinate the clearing of gullies better

*(Discussion across the group, giving examples of occasions where the gully clearing crews had been undertaken incompletely and inefficiently – the group speculated that the way in which the contract is managed could be the cause of these issues.)*

- Communities found that the Environment Agency river level readings on their website were not up to date enough – usually over an hour out of date.

*(Environment Agency representative informed the group that they agreed that data needed to be as 'live' as possible and that they were already working to improve this Nationally.)*

## Conclusions

The group agreed that there is a strong desire from communities to be able to develop greater resilience and increase self-sufficiency during major flooding events. The group recognised that during such events, it was unrealistic to expect the agencies to be everywhere at once due to resource limitations. Hand in hand with this recognition came a frustration from the group that the agencies also needed to accept that if they could not meet community needs fully during these circumstances, that they needed to 'let go' and empower communities to help themselves. In order to be able to achieve this, the group agreed the following were needed:

1. Clarity is needed urgently on which agency people should go to under various circumstances for help. The websites of all relevant agencies are unclear and confusing at present – the agencies should work together to resolve this and ensure common terms and simple language are used.
2. Agencies need to work together with communities to support them towards creating practical and resourced plans
3. Agencies need to provide support to communities to realise these plans, this could be Equipment, Financial Support and/or Training / advice
4. Agencies need to provide reassurance to communities on liability – this may need deregulation at national level.

## Business Continuity and Economic Impact Workshop

### Main Issues

- Business unable to get insurance ( not an act of god)
- £180 million in economic losses – based on SW Chambers figures
- Evidence of businesses having to close
- Loss of crops and produce

- Redundancies and total business failures
- Common messages and stats needed
- Somerset will become known to potential investors as somewhere it is too risky to invest
- £1000 per acre of agricultural land under water
- Need to be able to put together a credible business case to the treasury for greater government support
- Danger the compensation approach will drain public resources that could be better spent on prevention
- Recovery and Self help
- Investment in own resilience / adaption for agriculture
- What can be done nationally?
  - Need political commitment to overarching management plan
  - Establish position on underwriting insurance claims
  -

#### Priorities for improving vulnerable infrastructure

- Assemble economic business case for dredging investment (£5 million capital, £270k for 2 year's maintenance)
- Combination of funding sources and ensure local budgets agreed priorities
- May need to de-prioritise drainage in wettest areas in order to focus local budgets for biggest impact.

#### What can businesses do for themselves?

- Looking at their own resilience – **Investment** – adapting agricultural practices

What should be done to support businesses to recover from floods?

- Prevention better than cure
- Better business advice – insurance advice
- Personal level protection – parish level purchase of individual flood prevention equipment

#### What can be done nationally?

- Get government funding – get rural issues on the agenda – if such large areas of urban economic land were at risk of flooding -there would be greater government support
- Long term management plan (commitment)  
Change in criteria to trigger investment
- Outcome of discussions between insurance and government for underwriting insurance claims -Better guidance on contingencies plans from insurance companies to make firms insurable -Stressing the case about the importance of agricultural land – food security
- 

#### Priority actions –

- If we find £5 million, would there be any barriers to starting the dredging asap ?
- Rapid assembly of economic business case
- Review all budgets against priorities

- Improve vulnerable infrastructure
  - Strong business case for dredging – initial £5 million (capital) £270k every 2 years for regular maintenance
  - Do we continue to carry out drainage in the wettest areas ( adaption?)
  - Can we attract European funding?

## Interagency Working Workshop

What can be done to improve inter-agency working to improve flood responses?

- Constant flow of accurate and timely information
- Imperative that it is relevant information
- More information required for planning purposes
- Pre-planning maps / ditches / clearance screens etc
- Strategic Flood Risk Management Group
- increased profile / direction / sub groups etc
- Need a single point of contact
- The problem is not operational
- need to work through the above points and that should lead to single point of info for everybody to feed into. Sharing critical pieces of information
- National support
  - Dredging of main water courses
  - Appropriate equipment and training available to emergency services

## Flood prevention Workshop

- Add an objective to the New Land Management Scheme (operated by DEFRA?NE and developed to replace environmental stewardship) the new objective would be flood prevention / alleviation.
- Attenuation of water at a higher level (electricity use) -Attenuation to whole water management ( upper and lower catchment areas) Parratt catchment project
- Better understanding how the level hydraulically work
- If proposals which would provoke the Reservoirs Act would be low risk should be considered
- Better DEFRA guidance regarding volumes not just quantity – land management schemes.

## SOMERSET STRATEGIC LEADERS' COMMENTS ON RECOMMENDATIONS

	Scrutiny Draft Recommendations	Leader Draft Recommendations
1	That the report on the economic impact of the 2012 flooding events is reported to the Steering Group as soon as is practicable.	Agreed
2	That discussions with the Heart of the South West Local Enterprise Partnership (LEP) are initiated to look at the contribution the business community across the region can make to improving the infrastructure it was not only Somerset that was adversely affected when the mainline train route was compromised by flooding around Curry Moor / Lyng and Burrowbridge and that national bodies such as Network Rail should be actively involved in these solution based discussions.	<p>Replace with:</p> <p>That discussions with the Heart of the South West Local Enterprise Partnership (LEP) are initiated to:</p> <ul style="list-style-type: none"> <li>• Assess the impact of the 2012 flooding on the economic well-being and strategic infrastructure of Somerset and the surrounding areas;</li> <li>• Clarify the contribution that the LEP can make to improving outcomes on these issues.</li> </ul> <p>National bodies such as Network Rail should be actively involved in these solution based discussions given the impact on the mainline train route of flooding on the Levels and Moors.</p>
3	In addition, it is recommended that all opportunities to secure Partnership Funding (under the Defra Flood and Coastal Erosion Resilience Partnership Funding initiative) are actively pursued.	<p>That discussions with all partners should continue as a matter of urgency to agree a vision for flood prevention in Somerset for the future. This should clarify the aims and responsibilities of all of the partners, build a comprehensive understanding of the funding opportunities available and enable the development of appropriate business cases for projects and funding.</p> <p>This work should not stop all opportunities continuing to be pursued to secure Partnership Funding.</p>
4	That Somerset is actively represented by	Agreed

	all agencies, including our MPs in government level discussions to ensure that insurance against flooding remains widely available and affordable and the Insurance industry is encouraged to positively engage in flood management discussions to ensure better flood prevention.	
5	That a press protocol is devised, advising those dealing with media enquiries how to respond effectively and to promote the 'Somerset is open for business' message at times of flooding	Agreed
6	That in order to support the Lead Flood Authority in preparing the necessary strategy and policy documents as required by the Flood and Water Management Act, drafts of key documents are submitted to the Steering Group for consideration at an appropriate stage. This will ensure effective consultation with the constituent district authorities and that the pertinent issues already identified by this review are reflected in the emerging strategies.	Agreed
7	That further work is undertaken to look at how the £ 461,000 allocated by Defra to Somerset County Council as a Lead Flood authority money is committed and what accountability measures are in place? Also, how is this figure calculated and is it adequate based on the risks /actions identified in the Somerset local flood risk management strategy?	Agreed that the totality of current funding for flood related activities needs to be understood and the adequacy of this level of funding considered. In order to build up this picture all councils (including Exmoor National Park) will provide details of spending on flood and water management including external funding and project funding received. However all Government funding streams relating to flood relief and alleviation within Somerset should embrace the twin elements of transparency and accountability with the recipient organisations providing a full audit as to the purpose and details of the implementation of any scheme associated with this funding.
8	That the Steering Group considers the work that the Environment Agency and the Lead Flood Authority(SCC) have	The Leaders preference is that the Environment Agency should publish their existing surface water

	been doing to generate a new generation of surface water flood maps for England in compliance with the Flood Risk Regulations 2009.	flood maps on their website and promote their availability with a view to achieving greater transparency.
9	That discussions are had as soon as possible to identify practical and innovative sources of funding for a renewed programme of dredging in Somerset and that further work is carried out to ascertain the exact cost of dredging and realistic funding options. Such discussions would move beyond the more familiar territory of who should pay for dredging to who actually can pay. Discussions on this topic should look at contributions from Statutory Flood Management agencies ( EA IDB's, Local authorities ) as well as the business sector and community enterprises.	Agreed, however the anticipated impacts of any dredging on retaining structures along the river also need to be understood.
10	That a single 'Somerset Flooding Website' is created, to be hosted by the Lead Flood Authority to ensure effective consistent advice and information is given across the County.	In preference to a new website, the focus will be on improving communications by developing a flooding communications protocol for Somerset to ensure a cohesive approach to the provision of timely and relevant information on existing websites and via other appropriate mechanisms.
11	That a higher profile is given to the recently formed Community Resilience in Somerset Project to ensure that it supports as many communities as possible and that the Lead Flood Authority can use the project as a basis for implementing a more sustainable model similar to those operated in other areas such as North Somerset.	Agreed
12	That a further information event is held for Parish Councils and communities, facilitated by Avon and Somerset Police, Devon and Somerset Fire and Rescue and Somerset County Council covering the following points: <ul style="list-style-type: none"> <li>• Public Liability - what can the public be empowered to do in times of flood and how is this achieved ( road closures, flood alleviation etc)</li> <li>• What resources can be provided to communities – signage etc</li> </ul>	Agreed that rather than having a series of separate events, this recommendation will be taken forward by: <ul style="list-style-type: none"> <li>• adding flooding issues to the agendas for a series of public consultation events being planned by the County Council for the autumn</li> <li>• ensuring that every town</li> </ul>

	<ul style="list-style-type: none"> <li>• Advice on the use of vehicles in flood water – 4x4 community response vehicles etc</li> <li>• Definitive information on Road Closures – and what happens if signage is ignored.</li> </ul>	and parish council/meeting receives a flooding information pack which will include the points listed in the scrutiny recommendations.
13	That the Lead Flood Authority leads the preparation of a Riparian Owners Information Sheet to be made available to land owners and householders, containing information about Riparian responsibilities and sources of guidance or support.	Agreed and that this information can be included in the pack referred to above
14	That consideration is given by the Somerset Water Management Partnership (SWMP) to incorporating within its constitution the need for it to take a strategic overview of the issues raised at the Flooding Summit and in this report.	Agreed subject to the inclusion of a review of the groups active within Somerset on water management issues with the aim of simplifying the arrangements and clarifying responsibilities.

## **SEDGEMOOR DC – COMMUNITY SCRUTINY COMMITTEE – 1 JULY 2013**

### **Somerset Flood Summit Report**

The Scrutiny Officer informed the committee that the Somerset Flooding Summit had been given an award by the Centre for Public Scrutiny, for the work that had been undertaken on this subject and members of the committee congratulated the officers and Councillors involved.

Members were advised that this report was not the answer to all of Somerset's problems with flooding and in respect of the recommendations detailed on Pages 13 and 14, the Parishes wished for empowerment but it was noted that some of the recommendations could be achieved quickly, whereas others may take time as a strategic overview was needed.

The committee considered that there needed to be clarification on who was the lead authority for this project with the suggestion that the Somerset Water Management Partnership should take the lead and that any monies needed to be spent wisely. It was suggested that waterways should be dredged and that an exact cost ascertained to include maintenance after the dredging. Councillor Scott also suggested that information should be fed to the Internal Drainage Boards as this would include all waterways within the District and County, also that the Environment Agency should use their website for publicising of the project rather than spending money on a new website.

It was also noted that to provide effective protection to Northmoor the Parrett and Tone needed to be dredged between Hook Bridge and the Northmoor Pumping Station ( this was based on research evidence from the Parrett Drainage Board) There is a shortfall in funding which needs to be addressed by the County Council and the Environment Agency.

Members agreed that an update was needed to report on progress of the recommendations.

### **Resolved**

The Community Scrutiny Committee supported the recommendations detailed on Pages 13 and 14 of the report and referred them to the Executive.

## **SOUTH SOMERSET DC – SCRUTINY COMMITTEE 2 JULY 2013**

### **Somerset Flooding Summit – Draft Final Report**

The Scrutiny Manager presented the report as shown in the agenda. She commented that Sedgemoor District Council had considered the report the previous day and the other districts and county council would do so over the next few weeks. The Steering Group were of the opinion that the Somerset Water Management Partnership (SWMP) should be the lead group to take things forward, although concern had been raised about governance. Recently new governance had been discussed and a revised constitution was being drafted.

It was suggested that the steering group continues to meet, possibly twice a year, to monitor the progress of outcomes and to keep the momentum for action going. She noted that the leaders of the Somerset councils had met to consider the report and had fed back some comments. Members discussed the comments and the Deputy Leader, briefly explained the reasoning for some of them.

The Scrutiny Manager explained that at this stage Scrutiny members were being asked to endorse the Scrutiny recommendations, but they could be amended if they wished to incorporate some of the comments suggested by the leaders. Members unanimously agreed that the report be recommended to District Executive with the original Scrutiny recommendations.

The Chairman thanked the Scrutiny Manager, and SSDC members on the steering group – Councillors Dave Bulmer and Paul Maxwell, for their work with the flooding review.

**ACTION:** Members to note the draft final report on the Somerset Flooding Summit, and to recommend it to District Executive for consideration.

## **SOMERSET COUNTY COUNCIL – SCRUTINY COMMITTEE – 9 JULY 2013**

### **Somerset Flooding Report**

The Committee **considered** this report and **discussed** it along with the recommendations and responses from the Somerset Council Leaders and Chief Executives.

Members were encouraged by the positive solution based approach to flood prevention and **agreed** to approve the recommendations set out in Appendix B to the report.

Members **suggested** that at the next Joint Steering Group meeting in September **consideration** be given to the following:

- Attention be focused on practical work and solutions;
- Solutions were pursued as expediently as possible;
- Regarding funding for Internal Drainage Boards (IDB's) that the issue of disaggregation of the drainage levy be progressed;
- Focus on upper catchment areas and engaging with landowners and farmers;
- That telemetry and equipment be used to the best possible advantage and that things like pre-pumping on the Levels be considered prior to inclement weather.

## **MENDIP DC – SCRUTINY BOARD 29 JULY 2013**

### **Draft final report of the Somerset Flooding Summit**

Scrutiny Board was asked to consider the draft final report of the Somerset Flooding Summit and make any comments prior to consideration by Cabinet

The Lead Officer introduced the report by stating the significant flooding in the County instigated a County-wide joint scrutiny consideration of the issue. This culminated in conference in March 2013. The findings of that conference were set out in the report.

Members' attention was drawn to Item 10 on the updating, where references to Somerset County Council as Lead Flood Authority should have read 'Lead Local Flood Authority'. The updating also included Item 10, Appendix B; recommendations of the joint responses from the Leaders/Chief Executives.

Councillor North requested that Ian Liddell-Grainger's title of MP be included on page 3 of the report. It was also raised that no representatives from the insurance companies were in attendance during the summit. It was proposed that Scrutiny recommend additional pressure be put on insurance companies to attend future meetings.

Councillor Cottle disagreed with the notion that the floods did not affect Mendip significantly, citing the example of his car that was written off as a result of flood damage. He also referenced the losses that farmers suffered due to flooding.

Councillor Knibbs queried an email received by the Chairman of Selwood Parish Council that informed the Parish Council of an opportunity to apply for funding to clear and dredge rivers. Councillor Knibbs asked why the Parish Council had only been given the short timescale of two days notice to submit an application. The Portfolio Holder for Policy and Performance replied that £200,000 of funding was available county-wide, but had been discussed months before the aforementioned email was sent out.

Councillors felt that one of the problems surrounding the flooding was that with so many different organisations and groups invited, there were many different, conflicting viewpoints. It was felt that it would be more appropriate for one Authority to take centre stage and establish a policy to be followed.

Councillor Inchley enquired whether our Planning Policies allowed us to build houses on flood plains, and whether this was wise given the levels of recent flooding. The Portfolio Holder for Policy and Performance replied that the Environmental Agency, and not the Council, dictated whether houses could be built of flood plains or not.

Councillor Parham suggested one positive to take from the summit was the Environmental Agency's admission that their policy of not dredging rivers was wrong. It was added that despite that admission, the Agency stated that dredging would not be sustainable.

The Lead Officer confirmed that Somerset County Council were the Lead Local Flood Authority, tasked with coordinating a response to the flooding, but the Environmental Agency were responsible for any issues relating to dredging. There was no single person responsible, as an owner of the overall project. The Leaders of each respective Council would be responsible for taking issues forward, but no single person would assume the role of Chairman of the event.

Members were agreed to note and recommend the report.

## **RESOLVED**

To recommend the Somerset Flooding Summit draft report to Cabinet and that Scrutiny recommend additional pressure be put on insurance companies to attend future meetings regarding flooding.

# Taunton Deane Borough Council

## Executive – 9 October 2013

### Local Development Scheme 2013

#### Report of the Policy Lead Officers

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

#### 1. Executive Summary

The Planning and Compulsory Purchase Act 2004, as amended by the Localism Act 2011, requires local planning authorities to prepare and maintain a Local Development Scheme (LDS).

The LDS is a rolling project management plan for the preparation of planning policy documents (referred to as Local Development Documents or LDD's) that will direct future planning decisions in the Borough.

Unlike previous LDS documents, changes implemented through Section 111 of the Localism Act means that submission to the Secretary of State is no longer required. However, the local planning authority must resolve that the scheme is to have effect by resolution of Full Council.

The LDF Steering Group has requested that Full Council agrees that any future LDS schemes be taken to the Steering Group and then signed off by the Portfolioholder for Planning and Transportation rather than taken again to Full Council

#### 2. Background

The attached document is the seventh Local Development Scheme (LDS) prepared by this Council. The previous LDS was submitted to the Government Office in March 2011. It is now considered appropriate to revise the Scheme.

The LDS is a rolling project management plan for the preparation of planning policy documents (referred to as LDD's) that will direct future planning decisions in the Borough.

The Planning and Compulsory Purchase Act 2004, as amended by the Localism Act 2011 requires local planning authorities to prepare and maintain a Local Development Scheme.

Unlike previous LDS schemes, the document is no longer required to be submitted to the Secretary of State. Rather, it must be displayed on the Council's web site following a resolution of Full Council.

The LDF Steering Group have requested that any future revisions can be agreed by the Portfolio Holder for Planning and Transportation following consideration by the Steering Group, rather than taken back to Full Council.

### **3. Contents of the LDS**

The LDS identifies the relevant Development Plan Documents for Taunton Deane, and other related documents such as the Community Infrastructure Levy (CIL) and Authorities Monitoring Report (AMR) which the Council will prepare and the timescale for their delivery.

It sets out the staff resources available for the preparation of documents, the range of the evidence base required in their preparation, together with a profile of each programmed document prepared by the Council and the anticipated timetable over the next three years.

### **4. Finance Comments**

Development Plans provide the framework for delivering the Council's growth agenda and inward investment into the Borough. Related measures such as CIL and New Homes Bonus will contribute towards physical and social infrastructure improvements throughout the Borough. CIL is projected to raise around £44 million, or £7.5 million over the next 5 years. New Homes Bonus is projected to amount to around £12 million over the period to 2016. It should be noted that this NHB figure is prior to any top-slicing which occurs to fund the Local Enterprise Partnership. The Government is currently consulting on proposed changes, but at the time of writing no decision has been made about the extent of top-slicing.

### **5. Legal Comments**

There is a legal requirement on the Council to prepare and maintain an up to date Local Development Scheme pursuant to Section 15 of the Planning and Compulsory Purchase Act 2004 as amended by the Localism Act 2011.

### **6. Links to Corporate Aims**

The LDS sets out the range of planning policy documents that will be prepared. These documents directly relate to all three Corporate aims of 'Quality and Sustainable Growth and Development', 'A Vibrant Economic Environment' and 'A Vibrant Social, Cultural and Leisure Environment'.

### **7. Environmental Implications**

The planning documents contained in the LDS contain policies on climate change, the environment, mixed use development in sustainable locations to minimise the need to travel and maximise opportunities for public transport, cycling and walking, the use of resources and sustainable design. All the objectives, policies and proposals in Statutory Plans are subject to a sustainability appraisal.

## **8. Community Safety Implications**

The Core Strategy and Site Allocations and Development Management Plans contain policies on inclusive communities which address the needs of particular groups and areas of deprivation and seek to reduce crime and the fear of crime as well as incidences of antisocial behaviour; reduce social inequalities and disadvantage; and protect and enhance the supply of community facilities and local services.

## **9. Equalities Impact**

An Equalities Impact Assessment of the Core Strategy has been carried out and published alongside the Core Strategy document. A similar Assessment will be undertaken for the Site Allocations and Development Management Plan.

## **10. Risk Management**

The Councils Corporate Risk Register identifies the importance and risk of non delivery of town centre regeneration, housing and economic growth through statutory plans. The LDS also contains a Risk Assessment for the delivery of planning policy documents against a number of factors including staff turnover, 'soundness' of a Development Plan and legislative change.

## **11. Partnership Implications**

All planning documents are prepared in consultation with a wide range of stakeholders as set out in the Council's Statement of Community Involvement and can only be delivered in partnership with developers, communities, public bodies and adjoining districts, and other relevant stakeholders. The Localism Act 2011 Section 110 also provides a statutory requirement to work in partnership with public bodies to 'engage constructively, actively and on an ongoing basis' so far as relating to – among other matters - the preparation of development plan documents and other local development documents.

## **12. Recommendations**

The Executive is recommended to recommend Full Council to:-

- (a) Adopt the Local Development Scheme and timetable for the preparation of planning documents; and
- (b) Agree that any future changes to the Local Development Scheme be agreed through the Local Development Framework (LDF) Steering Group and Portfolio Holder for Planning and Transportation.

## **Contacts**

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## Local Development Scheme 2013

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## Introduction 1

This is the Taunton Deane Borough Council's seventh Local Development Scheme (**LDS**). The LDS is a rolling management plan for the preparation of planning policy documents referred to as Local Development Documents (**LDDs**) that will direct future planning decisions in the Borough.

The Planning and Compulsory Purchase Act 2004, as amended by the Localism Act 2011, requires local planning authorities to prepare and maintain a Local Development Scheme.

The LDS is reviewed and rolled forward either as a result of the Authorities Monitoring Report (AMR) identifying whether the LDS timetable is being achieved and thus needing revision, or the need to produce new Local Development Documents.

The previous LDS was submitted to the Government Office in March 2011. It is now out of date and needs refreshing

The reasons for this revised timetable are set out in section 11 'Monitoring and Review' of this LDS document. This has been reflected in Appendix 4 'Profiles of each Local Development Document' and Table 5.1 Appendix 5 'Local Development Scheme Timetable (3 year rolling programme)'.

Unlike previous LDS documents, changes implemented through S111 of the Localism Act means that submission of the Scheme to the Secretary of State is no longer required. However, the local planning authority must resolve that the scheme is to have effect and in that resolution specify the date from which the scheme is to have effect. For this purpose, by resolution of **Full Council on XXXX this LDS has come into effect.**

The LDS contains a number of abbreviations. For convenience, Appendix 1 'List of Abbreviations' of this document provides a brief definition of each abbreviation used.

Both the LDS and the AMR are available on the Borough Council's website [www.tauntondeane.gov.uk/ldf](http://www.tauntondeane.gov.uk/ldf).

## 2 The Local Development Framework

### The Local Development Framework

Under the Planning and Compulsory Purchase Act 2004 the Local Planning Authority is charged with producing a portfolio of individual planning documents which set the context for delivering the spatial planning strategy for the Borough. This includes Local Development Documents (LDDs) of two types:

- **Development Plan Documents (DPDs)** These have been subject to independent testing or examination and have the weight of development plan status in determining planning applications. These are now referred to as Local Plans.
- **Supplementary Planning Documents (SPDs)** These do not have development plan status but must undergo rigorous community involvement. SPDs elaborate on policies and proposals in the DPD and are a 'material consideration' in determining applications for planning permission.

In addition, the local planning authority is also required to prepare the following documents:

- **Statement of Community Involvement (SCI):** This document sets out the Local Planning Authority's policy for involving the community in the preparation and revision of all Local Development Documents and development management decisions. The SCI was adopted in 2007 and an updated version will be published over the winter of 2013/14. A profile of the SCI is provided in Appendix 3. The following link will access the SCI [www.tauntondeane.gov.uk/ldf](http://www.tauntondeane.gov.uk/ldf)
- **Authorities Monitoring Report (AMR):** The AMR assesses the implementation of the LDS and the extent to which the policies in Development Plan Documents are being achieved. The AMR is available via the following link [www.tauntondeane.gov.uk/ldf](http://www.tauntondeane.gov.uk/ldf)
- **Local Development Scheme (LDS):** This is a rolling management plan for the preparation of Development Plan Documents that will direct future planning decisions in the Borough.

The Local Development Framework (LDF) is the name given to the portfolio of LDDs together with the SCI, LDS and AMR.

The LDF system is intended to streamline the local planning process, provide greater flexibility and a quicker response to changes in local circumstances. The Development Plan will deliver a strategic approach to spatial planning, delivering sustainable development and reflecting some of 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, together with Development Management policies, programming and monitoring information.

## The Local Development Framework 2

The LDF is a key component in the delivery of the Taunton Deane Sustainable 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**).

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 2028.

### The Development Plan for Taunton Deane

The National Planning Policy Framework (NPPF) sets out the Government's planning policies for England and how these are expected to be applied. Planning law requires that applications for planning permission must be determined in accordance with the development plan, unless material considerations indicate otherwise.

The development Plan for Taunton Deane comprises the following documents:

- Saved policies of the Taunton Deane Local Plan (adopted 2004)
- Taunton Town Centre Area Action Plan (adopted 2008)
- Taunton Deane Core Strategy 2011-2028 (adopted 2012)
- Somerset Minerals Local Plan (adopted 2004)
- Somerset Waste Core Strategy (adopted 2013)

The Localism Act (2011) introduced provisions to allow communities to set out their own policies in relation to the use and development of land in their areas through Neighbourhood Plans. The Localism Act requires that the Council provides support to those communities who wish to produce Neighbourhood Plans. A number of communities have expressed an interest in preparing a Neighbourhood Plan although currently, none are at an advanced stage. When adopted a Neighbourhood Plan will become part of the Development Plan.

Prior to their revocation in 2013 the (not adopted) Regional Spatial Strategy for the South West and County Structure Plan also formed part of the Development Plan.

A number of policies in the Taunton Deane Local Plan were 'saved' in 2007. A number have now been replaced through adoption of the Taunton Town Centre AAP and the Core Strategy. For the AAP, paragraph 214 of the NPPF gave full weight to relevant policies in that Plan until 31st March 2013. After that date and for remaining 'saved' policies in the Local Plan, paragraph 215 of the NPPF indicates that due weight should be given to relevant policies in existing plans according to their degree of consistency with the Framework.

## 2 The Local Development Framework

However, it is therefore necessary to review remaining saved policies and provide up to date and complete Boroughwide planning policy coverage. The Planning Inspectorate found that the Core Strategy was in general conformity with the NPPF and the Council considers that the policies in the Taunton Town Centre AAP currently remain sufficiently flexible and robust. This LDS therefore proposes to prioritise work on the Site Allocations and Development Management Development Plan prior to commencing a review of the Core Strategy and AAP.

Appendix 4 'Profiles of each Local Development Document' explains the role and timetable for preparation of each LDD in greater detail . Table 5.1 Appendix 5 'Local Development Scheme Timetable (3 year rolling programme)' 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.

A number of related documents will be required to be prepared by the Policy team over the current three year LDS programme. Whilst these documents do not form part of the LDS they are shown in Appendix 5 (and in the case of CIL, also in Appendix 4) as they will impact on the available resources of the Policy team and form an important element of the teams work programme. These work areas consist of:

Community Infrastructure Levy (CIL): Required to fund major infrastructure requirements arising from growth when requirements for pooling of S106 contributions change in 2014.

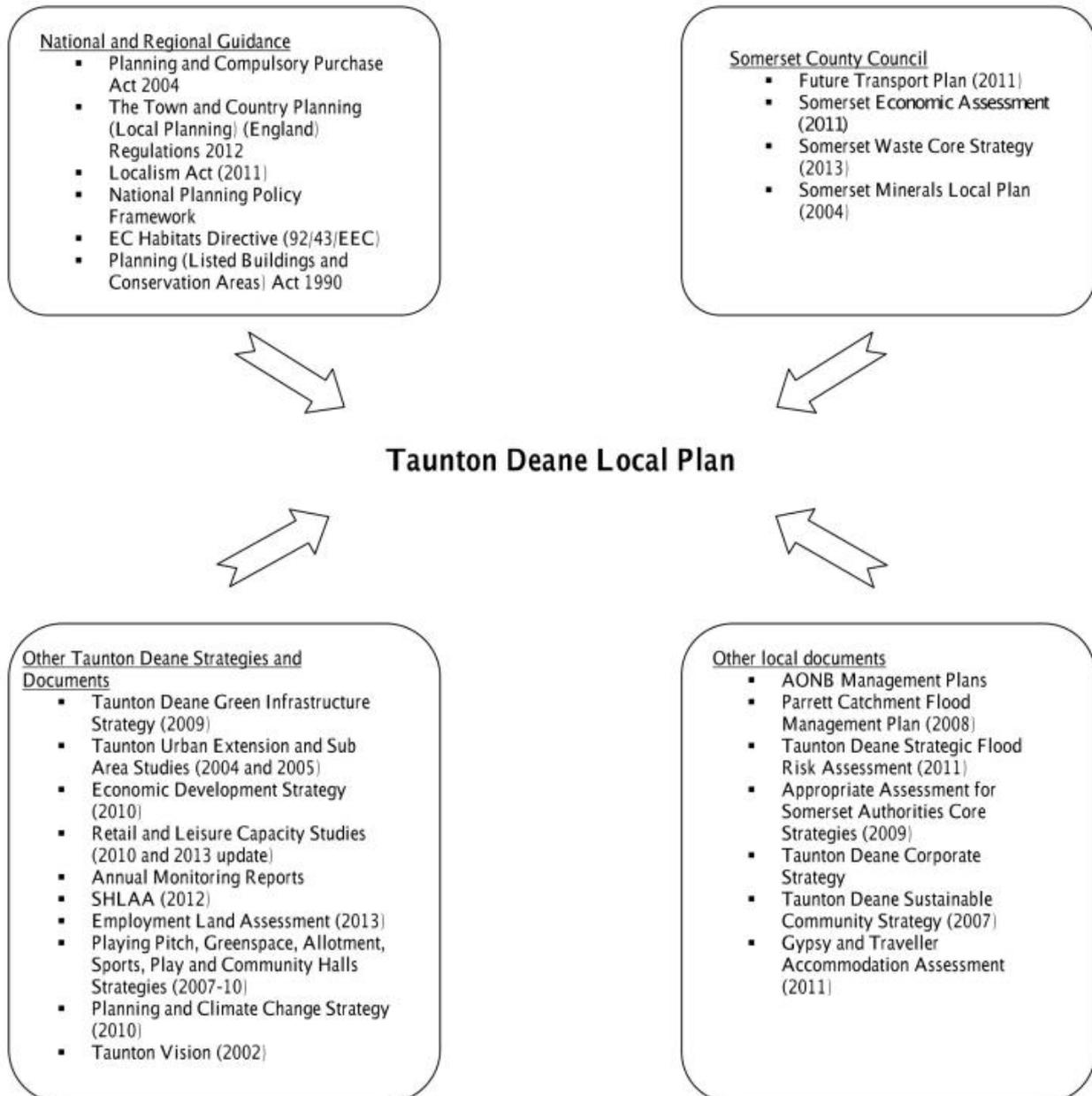
Supplementary Planning Documents (SPD): Although no longer required to be listed under an LDS, masterplanning and SPD production for major urban extensions at Monkton Heathfield, Comeytrove/Trull and Staplegrove will be required in partnership with developers, communities and other stakeholders.

Neighbourhood Plans: Three communities have currently received funding towards the preparation of Neighbourhood Plans. When adopted such Plans will become part of the Development Plan although timetables for preparation have not yet been firmed-up.

Authorities Monitoring Report (AMR): Publication is required at least annually (the Council publishes the AMR in December) although information gathering and collation is undertaken on an ongoing basis.

## Links with other Strategies and Plans 3

The Borough's future role and function is determined from 'above' by national policy and public bodies such as the Environment Agency 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 LDDs will need to be informed by and in conformity with a number of other internal and external Plans and Strategies.



The diagram above indicates the range of Plans and strategies that feed into the Development Plan process, ranging from the Sustainable Community Strategy (Talking Tomorrows Taunton Deane, 2007-2017) which was published by the then Taunton Deane Local Strategic Partnership (TDP), through to specialist documents that inform Plan preparation (e.g. the

### 3 Links with other Strategies and Plans

Councils Economic Development Strategy) and national guidance (e.g. EC Habitats Directive (92/43/EEC). It is not an exhaustive list but provides an indication of the range of documents that inform Plan preparation.

**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, Sports Strategy, Cultural Plan, Nature Conservation Strategy and Biodiversity Action Plan.

## Programme Preparation 4

The legal requirements for the preparation of a Local Development Scheme (LDS) are set out under Section 15 of the Planning and Compulsory Purchase Act 2004, as amended by Section 111 of the Localism Act 2011. Regulations applying to the preparation of Local Plans are currently laid out under the Town and Country Planning (Local Planning) (England) Regulations 2012.

Broadly, Taunton Deane Borough Council propose the following stages of Plan preparation:

Issues and Options: Gathering of evidence base through informal discussion with local communities and stakeholders such as the Taunton Deane Partnership, Parish Councils, business groups, statutory undertakers and other relevant stakeholders;

Preferred Option: Reporting back on initial 'Issues and Options' consultation with a 'preferred' direction of policies and allocations. This will be subject to further consultation along with a Sustainability Appraisal of the Plans contents.

Publication of Plan: The proposed submission document, accompanying maps and Sustainability Appraisal is formally published for representations, prior to submission to Secretary of State along with a submission statement and summary of representations received.

Examination: An independent Inspector will be appointed to examine the 'soundness' of the Plan, prior to making recommendations to the Council.

Adoption: Publication of the Inspectors report prior to formal adoption of the local plan by full Council.

The Gant chart attached as Table 5.1 Appendix 5 'Local Development Scheme Timetable (3 year rolling programme)' 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 after submission of the DPD to the Secretary of State and adjustments made to the LDS as necessary.

## 5 Management and Responsibilities

The Schedules in Appendix 4 'Profiles of each Local Development Document' (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 DPD preparation.
- Growth and Development Manager (links to community strategy, auditing of processes, project and resource management).
- Planning Policy Leads (programme planning, 'soundness' and overall delivery).

For each DPD the levels of political responsibility are as follows:

- An LDF Steering Group (a grouping of eight cross party Councillors) will meet and consider issues relevant to the preparation of DPD's and when different stages of DPD preparation has been reached, ensuring that Members are fully involved and informed in the process. This Steering Group has no decision-making powers.
- An Executive or relevant Executive Councillor decision will be required for all pre-submission stages.
- Review Board oversees decisions of the Executive or the Executive Councillor and have the opportunity to 'call in' decisions
- Full Council resolution would be required for submission and adoption stages.

The Taunton Deane Partnership (formerly 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.

Regular meetings are held between the Strategic Director, Growth and Development Manager and the Planning Policy Leads to ensure all lines of communication are working and to review progress and priorities.

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

The Chief Executive will take personal responsibility for ensuring that the Authorities Monitoring Report is produced on time. This document shall incorporate a section on the progress of the LDS.

## Resources 6

The Planning Policy Leads and Planning Policy team will be responsible for the preparation of Local Development Documents. The following staff resources will be available to do the work:

1 x Planning Policy Lead	100%
1 x Planning Policy Lead	80%
2 x Policy Officer FTE	100%
1 x Policy Officer (contract)	100%

Technical and Administrative support as required

In the past, the Housing and Planning Delivery Grant (HPDG) and New Growth Point (NGP) funding have enabled provision to be made to engage consultants on specific projects where there is either a lack of expertise or capacity in house, such as the Strategic Flood Risk Assessment, Core Strategy Appropriate Assessment, Hestercombe Appropriate Assessment, Strategic Housing Land Availability Assessment and Green Infrastructure Strategy. These studies provide background information in the formulation of the DPDs such as the Core Strategy and Site Allocations.

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 (then) RDA and Somerset County Council. Provision from NGP funds enabled the engagement of consultants in 2010 to assist in providing a revised evidence base for Core Strategy housing and employment targets and masterplanning of the proposed strategic urban extensions. The masterplans for the urban extensions will form part of a number of SPD, work on which is currently ongoing but are estimated for adoption in 2014.

For the immediate future, the 2013/14 and anticipated 2014/15 budgets, reserves and a proportion of New Homes Bonus will cover the future LDF programme for the coming years. This will be reassessed in the future when longer term financial matters are known.

## 7 Risk Assessment

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 Planning Policy team has had a low turnover of staff and low sickness absence. Due to the high level of work and the ongoing rolling programme of Plan preparation additional (contracted) staff have been employed to enable the Council to maintain Plan delivery broadly in line with past LDS timetables. However, due to the small size of the section, any loss of staff numbers or reallocation of resources would have severe consequences in the preparation of the LDDs and other core functions of the team
- **Financial Resources:** The Council is undertaking a review of its Corporate Business Plan and a budgetary review. A key aim of the Business Plan is to promote sustainable growth and development. Statutory plan preparation provides the framework for this aim and should therefore be seen as a principal area for continued funding.
- **Soundness of DPD's:** Risk has in the past been minimised through robust community engagement and evidence gathering, close engagement with key stakeholders such as the County Council, EA and the Planning Inspectorate. Future Plan preparation will continue this best practice 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 DPDs 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:** The Council has sought to minimise risk of slippage by drawing on experience from previous LDS preparation, 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.
- **Corporate Commitment:** Senior Managers and Members are strongly committed to the preparation of the suite of LDDs, recognising their importance as a key tool in the implementation of the Corporate Strategy and priorities, the Sustainable Community Strategy, the Vision for Taunton/Project Taunton and other related strategies and plans. Should significant slippages occur that need addressing, Managers and Members have expressed a willingness to reassess budgetary and other resources as part of any process to redress this issue.
- **Legislative Change:** Future changes to the timetable may be required to reprioritise or re-emphasise the preparation of LDDs as a result of possible changes to legislation. This cannot be realistically planned into the process in advance.

## Joint Working 8

The Duty to Cooperate has been introduced through the Localism Act 2011 to ensure cross-boundary cooperation between planning authorities. In doing so the Government acknowledged that there are strategic issues which are wider than local which require cross boundary cooperation, for example strategic infrastructure planning and delivery, and protection and enhancement of the natural and historic environment.

Compliance with the duty to cooperate will be tested at examination in public into local plans. Whilst further guidance will be published by central government for reasons of soundness, it is imperative that local authorities in Somerset ensure compliance with the duty from day one.

To this end, Somerset authorities have set up a joint Officer and Member working group to ensure close cooperation on a number of relevant issues such as opportunities for joint evidence bases (e.g. gypsy and travellers), transportation matters, strategic matters (e.g. housing markets) and the implications and opportunities arising from proposals at Hinkley Point.

## 9 The Evidence Base

The Borough Council developed a sound evidence base that was rigorously tested in the preparation of the recently adopted Boroughwide Core Strategy (2012) and Taunton Town Centre Area Action Plan (2008). 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.

As part of the continued updating of evidence, the following technical studies are examples of the range of the evidence base that will inform the Council's preparation of the LDDs within the current LDS:

- Taunton Urban Extension Study (2004)
- Landscape Character Assessment of Taunton rural/urban fringe 2005
- Taunton Deane Landscape Character Assessment 2011
- Taunton Deane Green Infrastructure Strategy 2009
- Retail and Leisure Capacity and Vitality and Viability study 2010 (2013 update in progress)
- Stage 1 Employment Land Assessment 2008 (2013 update in progress)
- Stage 2 Employment Land Assessment 2006
- Economic Topic Paper 2010 and Addendum 2011
- Envisioning the Future of Taunton Deane 2009
- Grow and Green: A new Economic Development Strategy for Taunton Deane 2010
- Taunton Deane Strategic Flood Risk Assessment 2011
- Flood Risk management Measures and Guidance 2013 (in progress)
- Watercycle Study 2010
- Play Policy 2007
- Green Space Strategy 2010
- Playing pitch Strategy 2010
- Allotment Strategy 2010
- Built Sports Facilities Strategy 2010
- Community Halls Strategy 2010
- Strategic Housing Market Assessment (SHMA) 2009

## The Evidence Base 9

- Strategic Housing Land Availability Assessment (SHLAA) 2012
- Taunton Deane Affordable Housing Viability Study 2011
- Gypsy and Travellers Accommodation Assessment 2010 (2013 update due to commence)
- Hestercombe Appropriate Assessment 2009
- Somerset Levels and Moors Appropriate Assessment 2009
- Core Strategy Sustainability Appraisal 2011
- Habitat Regulation Assessment of Taunton Deane Core Strategy 2011
- Taunton Deane Core Strategy Habitat Regulations Assessment addressing the Somerset Levels and Moors International Sites 2011
- Blackdown Hills Wind Turbine Capacity Study 2007 (AONB Office)
- PPS1 Supplement on Renewable Energy Requirements and Solutions 2010
- Infrastructure Delivery Plan 2011
- Community Infrastructure Levy Charging Schedule 2013
- Somerset County Council Future Transport Plan 2011
- Housing, Employment, Retail and Leisure yearly Monitoring reports, AMR etc

## **10 Sustainability Appraisal and Strategic Environmental Assessment**

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 LDDs at the very start of preparation and updated at each milestone stage. 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 2028.

## Monitoring and Review 11

The Council's initial LDS became operative on 21<sup>st</sup> March 2005 when the Secretary of State notified the Council that he did not intend to issue a direction under Section 15(4) of the 2004 Act. The 2004 Act specifies that an LDS should be revised "when appropriate". This would generally be either as a result of the Authorities Monitoring Report (AMR) identifying whether the LDS timetable is being achieved and/or the need to produce new local development documents.

The current LDS became operative in March 2011. However, as a result of further Council reorganisation which led to staffing changes, together with further government legislation, publication of the NPPF, revision of the evidence base to better reflect local circumstances and recent adoption of the Core Strategy, there have been necessary amendments to the production stages of Plan preparation. This needs to be reflected in a revised LDS.

A comparative schedule of the 2011 LDS dates and key revisions for the documents currently under preparation are set out in the table below, shown in schedule form with more detail in Appendix 4 and as a Gant chart in Appendix 5.

## 11 Monitoring and Review

**Table 1 Timetable Revision**

	Core Strategy		Site Allocations and Development Management	
	2011 LDS	Actual	2011 LDS	Proposed Change
<b>Early engagement</b>				Jan/Feb 13
<b>Preferred Option</b>	Jan/Feb 10	Jan/Feb 10	Sep/Oct 12	Oct/Nov 13
<b>Draft Plan Publication</b>	July/Aug 11	Aug 11	Mar/Apr 13	Jun/Aug 14
<b>Submit to S of S</b>	Oct 11	Nov 11	Jun 13	Oct 14
<b>Examination</b>	Feb 12	Feb 12	Oct 13	Jan/Feb 15
<b>Adoption</b>	Jul 12	Sep 12	Mar 14	May 15

The Core Strategy broadly kept to timetable. The adoption date slippage was beyond the Councils control; the Examination into the Core Strategy coinciding with release of the NPPF and Planning Policy for Travellers, which required a further period of consultation prior to the Inspector releasing his report.

Slippage for commencement of the Site Allocations and Development Management Plan (SADMP) was a result of both the delay caused through adoption of the Core Strategy and loss of the Planning Policy Advisor post which has led to a reduction in staff resource.

Once this Taunton Deane Local Development Scheme takes effect, the Council will:

- Make copies available during working hours at the Borough Council Offices, Deane House, Belvedere Road, Taunton;
- Publish it on the Council's website: [www.tauntondeane.gov.uk](http://www.tauntondeane.gov.uk)
- Inform key stakeholders of its revision

## List of Abbreviations Appendix 1

**AMR: Authorities Monitoring Report.** Formerly known as the Annual Monitoring Report. The AMR assesses the implementation of the LDS and the extent to which the policies in the Development Plan documents are being achieved.

**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.

**Local Plan:** Another term for a Local development document (LDD) as defined under Section 5 f the Town and Country Planning (Local Planning) (England) Regulations 2012.

**NPPF: National Planning Policy Framework.** This document sets out the Government's planning policies for England and how these are expected to be applied.

**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 (i.e. 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.

**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 1 **List of Abbreviations**

**TDP: Taunton Deane Partnership.** Previously referred to as Local Strategic Partnership (LSP). 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.

## The status of Local Plan policies and replacement by DPDs

### Appendix 2

The following table sets out the remaining Local Plan policies which were 'saved' in accordance with the 2004 Act/Regulations and have yet to be reviewed or replaced by policies in other Plans. These policies are to be reviewed as part of the current Site Allocations and Development Management Plan.

**Table 2.1 Local Plan Policies currently 'Saved'**

<b>Policy</b>	<b>Comment</b>
H17 Extension to dwellings	Review as part of Site Allocations and Development Management Plan
H18 Ancillary accommodation	Review as part of Site Allocations and Development Management Plan
EC16 New and altered shopfronts	Review as part of Site Allocations and Development Management Plan
EC17 Shopfront security	Review as part of Site Allocations and Development Management Plan
EC22 Land west of Bishops Lydeard Station	Policy no longer required. Development commenced.
EC26 Outdoor advertising and signs	Review as part of Site Allocations and Development Management Plan
M1 Non residential parking requirements	Currently replaced in Taunton town centre by policies Tr2, Tr3. Review as part of Site Allocations and Development Management Plan
M2 Non residential parking requirements outside Taunton and Wellington	Currently replaced in Taunton town centre by policies Tr2, Tr3. Review as part of Site Allocations and Development Management Plan
M3 Non residential development and transport provision	Currently replaced in Taunton town centre by policies Tr2, Tr3. Review as part of Site Allocations and Development Management Plan
M4 Residential parking provision	Currently replaced in Taunton town centre by policies Tr2, Tr3. Review as part of Site Allocations and Development Management Plan
M6 Traffic calming	Currently replaced in Taunton town centre by policies Tr2, Tr3. Review as part of Site Allocations and Development Management Plan
C2 Reserved school sites	Review as part of Site Allocations and Development Management Plan
C3 Protection of recreational open space	Review as part of Site Allocations and Development Management Plan

## Appendix 2 The status of Local Plan policies and replacement by DPDs

<b>Policy</b>	<b>Comment</b>
C4 Provision of recreational open space	Review as part of Site Allocations and Development Management Plan
C5 Sports facilities	Review as part of Site Allocations and Development Management Plan
C8 Development affecting disused railway tracks and canals	Review as part of Site Allocations and Development Management Plan
C9 Horse riding and riding establishments	Review as part of Site Allocations and Development Management Plan
C10 Golf	Review as part of Site Allocations and Development Management Plan
C11 Power lines	Review as part of Site Allocations and Development Management Plan
EN6 Protection of trees, woodlands, orchards and hedgerows	Review as part of Site Allocations and Development Management Plan
EN7 Ancient woodlands	Review as part of Site Allocations and Development Management Plan
EN8 Trees in and around settlements	Review as part of Site Allocations and Development Management Plan
EN11 Special Landscape features	Probably not needed. For further consideration
EN19 Recording and salvage from listed buildings	Review as part of Site Allocations and Development Management Plan
EN23 Areas of high archaeological importance	Review as part of Site Allocations and Development Management Plan
EN24 Urban open space	Review as part of Site Allocations and Development Management Plan
T4 Norton Fitzwarren	Development commenced but retain as saved policy until complete
T5 Norton Fitzwarren housing allocations	Development commenced but retain as saved policy until complete
T6 Norton Fitzwarren employment allocations	Development commenced but retain as saved policy until complete
T7 Norton Fitzwarren community allocations	Development commenced but retain as saved policy until complete
T13 East of Silk Mills	Development nearly complete.

## The status of Local Plan policies and replacement by DPDs

### Appendix 2

<b>Policy</b>	<b>Comment</b>
T15 Small residential allocations	Review as part of Site Allocations and Development Management Plan
T16 East of Crown Estates	Development commenced but retain as saved policy until complete
T19 Primary shopping area	Review as part of Site Allocations and Development Management Plan
T20 Restrictions on change of use from food and drink	Review as part of Site Allocations and Development Management Plan
T21 Secondary shopping areas	Review as part of Site Allocations and Development Management Plan
T27 Bus facilities provision	Review as part of Site Allocations and Development Management Plan
T28 Park and Ride sites	Allocations developed. However, commitment given to employment use on remainder of Silk Mills site. Review as part of Site Allocations and Development Management Plan.
T30 Walking encouragement	Review as part of Site Allocations and Development Management Plan
T31 Pedestrian priority measures	Review as part of Site Allocations and Development Management Plan
T33 Taunton's skyline	Review as part of Site Allocations and Development Management Plan
T34 Approach routes into Taunton	Review as part of Site Allocations and Development Management Plan
T36 Blackbrook recreational open space	Review as part of Site Allocations and Development Management Plan
T37 Priorswood landfill site	Review as part of Site Allocations and Development Management Plan
T38 Maidenbrook playing field	Review as part of Site Allocations and Development Management Plan
W2 Tonedale Mill	Review as part of Site Allocations and Development Management Plan
W6 Milverton Road	Review as part of Site Allocations and Development Management Plan
W7 Primary shopping area	Review as part of Site Allocations and Development Management Plan

## Appendix 2 The status of Local Plan policies and replacement by DPDs

<b>Policy</b>	<b>Comment</b>
W8 Restrictions on change of use from food and drink	Review as part of Site Allocations and Development Management Plan
W9 Secondary shopping areas	Review as part of Site Allocations and Development Management Plan
W11 Town centre uses	Review as part of Site Allocations and Development Management Plan
W13 Retention of existing burgage patterns	Review as part of Site Allocations and Development Management Plan
W14 Approach routes into Wellington	Review as part of Site Allocations and Development Management Plan
W15 Sewage treatment works	Review as part of Site Allocations and Development Management Plan
BL1 Gore farm	Site lies within settlement limits. Retention of policy unnecessary.
CO1 Corfe Farm	Review as part of Site Allocations and Development Management Plan
WV1 North of Style Road	Review as part of Site Allocations and Development Management Plan
WV3 South of Taunton Road	Review as part of Site Allocations and Development Management Plan

## Statement of Community Involvement Appendix 3

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 LDDs and major planning applications. It is the Council's service level agreement with the community and stakeholders. The structure of the first SCI (2007) involved close liaison with the Local Strategic Partnership (now TDP), 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 forges the linkages with the Community Strategy and community planning processes, enabling the LDF to address locally based issues and expectations.

The preparation of the SCI was given top priority because of its interrelationship with the production of the Community Strategy and LDF documents. Public consultation on the process was undertaken in 2005 and submission to the Secretary of State was made in November 2006. The Inspector's report was received in February 2007 and the SCI was adopted in July 2007.

A review of the SCI will be undertaken during 2013. This is a year later than the proposed review date in the 2011 LDS but has been delayed due to capacity issues.

**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.

### Timetable

- All stages complete
- Review proposed 2013

## Appendix 4 Profiles of each Local Development Document

### Site Allocations and Development Management DPD

Table 4.1

<b>Description</b>	<b>Site specific allocation document, to assist in meeting housing, employment and other targets and requirements specified in adopted Core Strategy. Will also contain a suite of 'detailed' development management policies.</b>
Coverage	Boroughwide, excluding Taunton town centre
Status	Development Plan Document
Timetable	See Appendix 5. Commence 2013. Adoption 2015
Joint working	Aspects of information gathering (e.g. Gypsy and Travellers)
Organisational Lead	Growth and Development Manager
Political management	Executive Councillor for Planning Policy and Transportation. Council's LDF Steering Group will review evidence at each stage and make recommendations to Executive or the relevant Executive Councillor. Full Council resolution required for Submission and Adoption stages.
Internal resources	Planning Policy team, Development Management, Housing Services, Economic Development Unit, Environmental Health.
External resources	Somerset County Council's Education, Planning and Highways Departments, County Archaeologist, Environment Agency, Highways Agency, LEP, Wessex Water.
Stakeholder resources	TDP to provide key link with community planning. Town and Parish Councils, prospective developers, local stakeholders and community groups
Community and stakeholder involvement	Early stakeholder and community engagement. Consultation on Issues and Options and Preferred Options, prioritising affected parishes and communities.
Post production monitoring	Annual monitoring of policies and selected key indicators such as housing and employment completions. Reported in the AMR

## Profiles of each Local Development Document Appendix 4

### Taunton Town Centre Area Action Plan and Core Strategy review

**Table 4.2**

<b>Description</b>	<b>Review of economic and demographic projections and thus employment, housing and other associated requirements (eg retail and leisure). This will also be used to inform a review of the TTCAAP</b>
Coverage	Taunton town centre (AAP) and Boroughwide (Core Strategy)
Status	Development Plan Document
Timetable	See Appendix 5. Commence 2015
Joint working	Some evidence base prepared jointly (e.g. Strategic Housing Market Assessment)
Organisational Lead	Growth and Development Manager
Political management	Executive Councillor for Planning Policy and Transportation. Council's LDF Steering Group will review evidence at each stage and make recommendations to Executive or the relevant Executive Councillor. Full Council resolution required for Submission and Adoption stages.
Internal resources	Planning Policy team, Development Management, Housing Services, Economic Development Unit, Project Taunton, Environmental Health.
External resources	Consultants engaged to undertake various technical studies. Somerset County Council to advise on transport, planning and educational requirements arising from new developments. Highways Agency, Natural England, English Heritage, Environment Agency, DEFRA and utility providers will be consulted and advise on matters concerning their interests.
Stakeholder resources	TDP to provide link to community planning. Town and Parish Councils, prospective developers, local stakeholders and community groups. Project Taunton Advisory Board to advise on town centre regeneration priorities.
Community and stakeholder involvement	Early stakeholder and community engagement building on work developed through the agreed SCI with the TDP. Full consultation on Issues and Options and Preferred Options and proposals.
Post production monitoring	Annual monitoring of policies and selected key indicators such as housing and employment completions. Reported in the AMR

## Appendix 4 Profiles of each Local Development Document

### Community Infrastructure Levy

**Table 4.3**

<b>Description</b>	<b>Charging schedule for new development resulting from 2008 Act and Localism Act 2010 (as amended 2011) to fund strategic infrastructure provision required from new development.</b>
Coverage	Boroughwide
Status	Charging schedule (under CIL Regulations)
Timetable	See Appendix 5. Adoption Jan/Feb 2014
Joint working	None
Organisational Lead	Growth and Development Manager
Political management	Executive Councillor for Planning Policy and Transportation. Council's LDF Steering Group will review evidence at each stage and make recommendations to Executive or the relevant Executive Councillor. Full Council resolution required for draft charging schedule and adoption stages.
Internal resources	Policy team, Development Management and Project Taunton
External resources	Specialist consultant advice, landowners, developers, agents.
Stakeholder resources	Prospective developers, public utility and infrastructure providers including Highways Agency, Somerset County Council, Environment Agency, (then) PCT.
Community and stakeholder involvement	Developer workshop (June 11), consultation on preliminary draft charging schedule (June/July 12) and draft charging schedule ( Feb/Mar 13)
Post production monitoring	Publish and regularly review the IDP, Regulation 123 list and the Charging Schedule

It should be noted that whilst the Community Infrastructure Levy (CIL) is not part of the Development Plan it is subject to Examination and the Council has therefore used its discretion to include CIL within this schedule to provide a wider understanding of the Council's work priorities.

## Profiles of each Local Development Document Appendix 4

### Authorities Monitoring Report

**Table 4.4**

<b>Description</b>	<b>Reports on a range of matters including timetable of LDS preparation, the monitoring of key Indicators directly related to Statutory Plan objectives, Neighbourhood Development Plans and Community Infrastructure Levy.</b>
Coverage	Boroughwide
Status	Non Development Plan Document. Must conform with Section 35 of the Planning and Compulsory Purchase Act 2004 as amended by Section 113 of the Localism Act 2011.
Timetable	Annual December publication
Joint working	None
Organisational Lead	Growth and Development Manager
Political management	Reported to LDF Steering Group. Executive Councillor for Planning and Transportation 'sign-off'
Internal resources	Planning Policy team
External resources	None
Stakeholder resources	None
Community and stakeholder involvement	None
Post production monitoring	Ongoing monitoring of planning applications etc in annual topic reports (eg Housing, Employment) feeding into AMR.

## Appendix 4 Profiles of each Local Development Document

### Neighbourhood Plans

**Table 4.5**

<b>Description</b>	<b>Plans can establish general planning policies in a defined neighbourhood. Must be in conformity with the Council's Statutory Plans.</b>
Coverage	Specific Parishes
Status	Development Plan Document
Timetable	Non specific. See Appendix 5.
Joint working	None
Organisational Lead	Not applicable
Political management	None until adoption stage and then Executive and Full Council
Internal resources	Specific officer from Policy team as required.
External resources	Potential support from Planning Aid.
Stakeholder resources	TDP to provide link to Community Planning. Specific Town and Parish Councils, prospective developers, public utility and infrastructure providers including Somerset County Council, Environment Agency.
Community and stakeholder involvement	To be led by specific Town and Parish Council
Post production monitoring	Responsibility of relevant Town and Parish Councils in liaison with TDBC



## Appendix 6 Existing Supplementary Planning Guidance

### **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)

# Taunton Deane Borough Council

**Executive – 9 October 2013**

## **Taunton Deane Borough Council Planning Obligations Affordable Housing Supplementary Planning Document**

### **Report of the Housing Enabling Lead**

(This matter is the responsibility of Councillor Jean Adkins, Housing Portfolio Holder.)

#### **1. Executive Summary**

The Taunton Deane Core Strategy 2011-2028 was adopted in September 2012. The proposed affordable housing supplementary planning document is intended to provide additional guidance in decision making relating to planning applications that include residential development, where an affordable housing contribution is to be sought.

#### **2. Background**

- 2.1 The purpose of the proposed Supplementary Planning Document (SPD) is to provide greater detail on Policy CP4 Housing in the Council's Core Strategy 2011-2028.
- 2.2 Policy CP4 aims to ensure that affordable housing is provided as part of all development schemes which provide five or more net additional dwellings. The policy states that 25% of all new housing should be in the form of affordable units.
- 2.3 Gypsy and Traveller sites are covered by separate Development Management policy (DM3) within the adopted Core Strategy, therefore this SPD is not applying consideration to Gypsy and Traveller sites.
- 2.4 The Council operates an Affordable Housing Development Partnership which delivers affordable housing in the Borough and the adoption of this supplementary planning document will provide a clear guide for the TDBC affordable housing development partnership to work with.
- 2.5 The Housing Association partners have been informally consulted and have contributed to the formation of this document.
- 2.6 This proposed SPD will be processed through the Statutory Consultation process in line with the Statement of Community Involvement.

- 2.7 As the proposed SPD is intended as additional guidance to the adopted Core Strategy and emerging site allocations document a separate sustainability appraisal has not been deemed as required.
- 2.8 The LDF Steering Group and Strategic Planning Working Group (SPWG) have been also been consulted.

### **3. Taunton Deane Borough Council Planning Obligations Affordable Housing Supplementary Planning Document**

The complete document is appended to this report. A summary of key points are:

- 3.1 Policy CP4 aims to ensure that affordable housing is provided as part of all development schemes which provide five or more net additional dwellings. The policy states that 25% of all new housing should be in the form of affordable units.

#### **3.2 Tenure**

The Council will seek a tenure split of 60% social rented housing and 40% intermediate housing or Affordable Rented on affordable housing provision of 3 affordable dwellings or more.

On schemes yielding 3 or fewer affordable dwellings the Council may seek a partial financial contribution in lieu of housing in order to bring the total overall provision within a development up to the required 25% affordable housing.

All financial contributions will be ring fenced for expenditure to develop affordable housing within the Borough.

#### **3.3 Site Viability**

Policy CP 4 seeks 25% affordable housing provision and states that when assessing proposals, the Council will have regard to the economics of provision.

In instances where applicants claim that full or partial delivery of the affordable housing as required by CP4 is not possible on viability grounds, the Council, through the Housing Enabling Lead, will consider in the first instance a revised tenure split and unit types for the development.

In the event that viability issues cannot be resolved through changes to the tenure and/or unit types, the applicant will be expected to submit a viability statement.

#### **3.4 Off site provision**

In exceptional circumstances, where the Council agrees that affordable housing can be provided off-site, its location will be sought in the following

priority order taking into account local need and site availability:

- Adjacent to the development
- Elsewhere within the Parish (or Taunton urban area in the case of the unparished area)
- Elsewhere in the Borough

It is expected that such off-site provision will accommodate the same number and type of units that would otherwise be required on the application site.

### 3.5 Financial Contribution

The Council will likewise only accept financial contributions in-lieu of on-site provision in exceptional circumstances. In such cases the applicant should set out a detailed statement alongside their application outlining the reason or reasons why on-site provision is not considered to be appropriate.

The Council will use the financial contributions in the following ways:

- Fund the provision of new affordable housing through Registered Providers;
- Purchase land for new affordable housing schemes either directly by the Council or through Registered Providers;
- Fund activities relating to the delivery of affordable housing.

### 3.6 Exception Sites

The Council intends as far as possible to plan for meeting affordable housing needs within or adjacent to rural settlements by identifying and prioritising sites for housing development through the site allocations process.

Within the adopted Core Strategy, Development Management Policy DM2, Development in the Countryside states under point 6. that Affordable Housing will be supported outside of defined settlement limits if

- a. adjoining settlement limits, provided not suitable site is available within the rural centre;
- b. in other locations well related to existing facilities and to meet an identified local need which can not be met in the nearest identified rural centre.

The National Planning Policy Framework recognises that on occasion it may be appropriate to permit the development of affordable homes on sites that would otherwise not be released for housing development, that is 'exception sites'.

The Council will expect these developments to be small scale and should:

- Meet or help to meet a proven and specific local need for affordable housing in the Parish or adjoining rural Parishes, which would not

otherwise be met. Local housing needs will need to be demonstrated via an up to date Parish survey. The cost of the survey is to be borne by the applicant.

- Be within or adjacent to the settlement boundary, well related to existing community services and facilities and sympathetic to the form and character of the village.
- Arrangements will be secured to ensure that initial and subsequent occupancy of the dwellings is restricted first to those having an identified local need for affordable housing through the use of appropriate safeguards, including planning conditions or Section 106 obligations.
- In the event that a small proportion of cross subsidy through open market housing is required to facilitate the provision of the remaining affordable housing to meet an identified local need, this will need to be discussed with the planning officer and housing enabling lead prior to submitting a planning application. A detailed statement, including viability information should be submitted with the planning application.

### 3.7 Design, Quality and Sustainability Standards

Policy CP 4 expects the delivery of mixed, balanced and sustainable communities with affordable housing will be integrated with market housing.

The affordable housing should be built to meet the latest Homes and Communities Agency Design and Quality Standards including the relevant Code for Sustainable Homes level requirement applicable at the date of commencement of the development.

### 3.8 Housing Need

The Council will refer to Housing Needs data held within the Choice Based Lettings System in the first instance.

In the event if further housing needs information is deemed necessary by the Borough's Housing Enabling Lead, the applicant will be expected to provide a local Housing Needs Survey for approval at their own cost.

### 3.9 Local Connection

A local connection clause will be included in Section 106 Agreements in relation to all schemes outside the Taunton and Wellington urban area to ensure that the Parish which is accommodating the development has the priority access to the affordable homes which can contribute towards absorbing the Parish's housing need.

Where a scheme gives rise to a requirement for 25 affordable homes or more on one site a local connection clause is not required

### 3.10 Occupancy

Affordable housing for social rent and Affordable Rent secured through planning obligations will be allocated in accordance with the Choice Based Lettings System, Homefinder Somerset or such other register or scheme that may supersede the Homefinder Somerset Register.

In the first instance, applicants for intermediate housing secured through the planning obligations will be taken from either Homefinder Somerset register or the Homebuy Agent list or such register of list that may supercede.

In exceptional circumstances and in the event of there being no one available on the Homefinder Somerset Register or Homebuy agent list, any person approved in writing by the Housing Enabling Lead (such approval not to be unreasonably withheld)

## 4. Finance Comments

Comments received from Nick Tregenna, Principal Accountant:

There are no financial implications arising from the proposals outlined within the report which will impact directly upon the Council's revenue budget. However, the recommended **Affordable Housing Supplementary Planning Document** would provide the Council with the opportunity to maximise the potential for Affordable Housing through either an allocation within specific developments; or in exceptional circumstances, from funding provided by an applicant to supplement development elsewhere within the Borough.

## 5. Legal Comments

Comments received from Roy Pinney, Legal Services Manager

The proposed SPD reflects the purpose for such documents identified in Annex 2 of the NPPF, which identifies them as "*Documents which add further detail to the policies in the Local Plan*", which "*can be used to provide further guidance for development on...particular issues*". The NPPF specifically states that in the decision making process, a supplementary document is to be regarded as a material planning consideration, but confirms that such documents are not to be regarded as forming part of the development plan.

The process of adoption of Supplementary Planning Documents is regulated by Part 5 of the Town and Country Planning (Local Plans) (England) Regulations 2012, and the post-adoption procedural steps required by these Regulations will need to followed. Any decision by a local planning authority to adopt an SPD will represent a decision of the authority which is technically susceptible to a possible application for permission for judicial review.

## 6. Links to Corporate Aims

The affordable housing supplementary planning document supports the

Councils Business Plan Aim 1: Quality Sustainable Growth and Development and is identified under the 'Affordable Housing' key activity.

## **7. Environmental Implications**

The proposed SPD will require that the affordable housing are built to meet the latest Homes and Communities Agency Design and Quality Standards including the relevant Code for Sustainable Homes level requirement applicable at the date of commencement of the development.

## **8. Community Safety Implications**

The proposed SPD is intended to encourage the delivery of mixed, balanced and sustainable communities with affordable housing being integrated with market housing.

## **9. Equalities Impact**

Evidence taken shows no potential for discrimination specific to protected groups

A full equalities Impact Assessment is provided at appendix 4

## **10. Risk Management**

The key risk for TDBC is not optimising affordable housing delivery to meet the local housing need and maintain high quality, sustainable affordable homes.

## **11. Partnership Implications**

The adoption of the affordable housing SPD would provide a clear guide for the TDBC affordable housing development partnership to work with.

## **12. Recommendations**

The Executive are invited to recommend that it approves the Affordable Housing Supplementary Planning Document for public consultation

**Contact:** Jo Humble  
Housing Enabling Lead  
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## **Taunton Deane Borough Council Planning Obligations Affordable Housing Supplementary Planning Document**

### **1.1 Introduction**

The purpose of the proposed Supplementary Planning Document (SPD) is to provide greater detail on Policy CP4 Housing in the Council's Core Strategy 2011 - 2028. The guidance within the SPD is intended to be used in decision making relating to planning applications that include residential development, where an affordable housing contribution is to be sought.

Policy CP4 aims to ensure that affordable housing is provided as part of all development schemes which provide five or more net additional dwellings. The policy states that 25% of all new housing should be in the form of affordable units.

The type and size of the affordable housing units to be provided should fully reflect the distribution of property types and sizes in the overall development.

Affordable housing is currently defined in Annex 2 of National Planning Policy Framework. A copy of current definitions is included in *Appendix 1*

### **1.2 Affordable Housing Threshold**

25% of all new housing should be in the form of affordable units. Affordable Housing will be sought on sites of 5 or more net additional dwellings.

Affordable Housing maybe secured via on-site or off-site affordable housing provision, whether provided in-kind or an equivalent financial contribution.

### **1.3 Location**

Where it is provided on site, affordable housing should be located on the same site as and be an integral part of the development. The practicalities of managing and maintaining units will be taken into account when agreeing the appropriate spatial distribution of units on the site.

### **1.4 Tenure**

The Council will seek a tenure split of 60% social rented housing and 40% intermediate housing or Affordable Rented on affordable housing provision of 3 affordable dwellings or more.

This tenure mix was identified in the evidence base which informed the adopted Core Strategy: Fordhams Locally Balanced Housing Projections (2010, 2011)

The 40% can be intermediate housing or Affordable Rented accommodation, in line with the definitions in the NPPF (see appendix 1).

The unit types should reflect the mix of the overall development.

On schemes yielding 3 or fewer affordable dwellings the Council may seek a partial financial contribution in lieu of housing in order to bring the total overall provision within a development up to the required 25% affordable housing.

All financial contributions will be ring fenced for expenditure to develop affordable housing within the Borough.

## **1.5 Affordable Housing Scheme**

Proposals involving affordable housing should be discussed at the earliest opportunity with the Borough's Housing Enabling Lead as part of pre-application discussions.

The affordable housing scheme is to be agreed in writing by the Housing Enabling Lead at the Council.

The scheme must include:-

- The location and layout of the affordable housing
- The mix and anticipated tenure of the affordable housing

The Council is keen to use Planning Performance Agreements (PPA) as a mechanism for managing large scale developments. The approach to affordable housing should be included in any PPA.

## **1.6 Registered Providers**

The Council operates an Affordable Housing Development Partnership which delivers affordable housing in the Borough.

The Council's current list of Approved Partners is included in *appendix 2*.

## **1.7 Site Viability**

Policy CP 4 seeks 25% affordable housing provision and states that when assessing proposals the Council will have regard to the economics of provision.

In instances where applicants claim that full or partial delivery of the affordable housing as required by CP4 is not possible on viability grounds, the Council, through the Housing Enabling Lead, will consider in the first instance a revised tenure split and unit types for the development.

In the event that viability issues cannot be resolved through changes to the tenure and/or unit type, the applicant will be expected to submit a viability

statement. Ideally this should be completed as part of the pre-application process prior to the submission of the planning application.

In such development proposals where the applicant considers that full or part delivery of affordable housing is not possible, the Local Planning Authority will expect the application for planning permission to include detailed calculations and submissions to enable an assessment of viability to be carried out. This will prevent delays to determination or the prospect of refusal of planning permission.

Applicants should ideally have their figures independently assessed using the services of the Council's preferred independent assessor prior to submitting them to the Council. This open book approach will enable any affordable housing contribution to be assessed and agreed prior to the submission of a formal planning application. In this way data which the applicant may regard as commercially sensitive will remain outside the public domain.

Pursuit of this approach by applicants will assist in the efficient consideration of planning applications. The applicant will be expected to meet the costs of the Council's preferred independent assessor.

## **1.8 Off site provision**

In exceptional circumstances, where the Council agrees that affordable housing can be provided off-site, its location will be sought in the following priority order taking into account local need and site availability:

- Adjacent to the development
- Elsewhere within the Parish (or Taunton urban area in the case of the unparished area)
- Elsewhere in the Borough.

It is expected that such off-site provision will accommodate the same number and type of units that would otherwise be required on the application site.

## **1.9 Financial Contribution**

The Council will likewise only accept financial contributions in-lieu of on-site provision in exceptional circumstances. In such cases the applicant should set out a detailed statement alongside their application outlining the reason or reasons why on-site provision is not considered to be appropriate.

Where the Borough Council agrees that a financial contribution in lieu of on-site provision of affordable housing would be acceptable, the contribution will be calculated through the Taunton Deane Borough Council Financial Contribution Calculator system.

The Council will use the financial contributions in the following ways:

- Fund the provision of new affordable housing through Registered

- Providers;
- Purchase land for new affordable housing schemes either directly by the Council or through Registered Providers;
  - Fund activities relating to the delivery of affordable housing.

### **1.10 Exception Sites**

The Council intends as far as possible to plan for meeting affordable housing needs within or adjacent to rural settlements by identifying and prioritising sites for housing development through the site allocations process.

Within the adopted Core Strategy, Development Management Policy DM2, Development in the Countryside states under point 6. that Affordable Housing will be supported outside of defined settlement limits if

- a. adjoining settlement limits, provided not suitable site is available within the rural centre;
- b. in other locations well related to existing facilities and to meet an identified local need which can not be met in the nearest identified rural centre.

The National Planning Policy Framework recognises that on occasion it may be appropriate to permit the development of affordable homes on sites that would otherwise not be released for housing development, that is 'exception sites'.

The Council will expect these developments to be small scale and should:

- Meet or help to meet a proven and specific local need for affordable housing in the Parish or adjoining rural Parishes, which would not otherwise be met. Local housing needs will need to be demonstrated via an up to date Parish survey. The cost of the survey is to be borne by the applicant.
- Be within or adjacent to the settlement boundary, well related to existing community services and facilities and sympathetic to the form and character of the village.
- Arrangements will be secured to ensure that initial and subsequent occupancy of the dwellings is restricted first to those having an identified local need for affordable housing through the use of appropriate safeguards, including planning conditions or Section 106 obligations.
- In the event that a small proportion of cross subsidy through open market housing is required to facilitate the provision of the remaining affordable housing to meet an identified local need, this will need to be discussed with the planning officer and housing enabling lead prior to submitting a planning application. A detailed statement, including viability information should be submitted with the planning application.

### **1.11 Design, Quality and Sustainability Standards**

Policy CP 4 expects the delivery of mixed, balanced and sustainable communities with affordable housing will be integrated with market housing.

In order to achieve a successful development the affordable housing should not be visually distinguishable from the market housing on site in terms of build quality, materials, architectural details, levels of amenity space, parking provision and privacy. It should be fully integrated with the market housing and distributed across the site or in clusters distributed throughout the development.

The affordable housing should be built to meet the latest Homes and Communities Agency Design and Quality Standards including the relevant Code for Sustainable Homes level requirement applicable at the date of commencement of the development. These Standards can be viewed on the Homes and Communities Agency website (<http://www.homesandcommunities.co.uk/>) or such Standards which may supersede.

Developers are strongly advised to consult with the Council's Registered Provider Partners at an early stage to ensure that the design of affordable housing units will meet these Standards.

### **1.12 Delivery – Phasing**

The Council will expect timely delivery of the affordable housing element of implemented schemes.

Where ever possible developers should ensure that they are in contract with an approved registered provider prior to commencement of the development on site.

### **1.13 Service Charge**

Any service charges applicable to affordable housing are to be agreed with the Registered Provider at the earliest opportunity.

If in the course of the negotiations it is deemed by the Registered Provider that the proposed service charge is unaffordable, the developer should then liaise with the Borough's Housing Enabling Lead to resolve this matter.

### **1.14 Specialist residential development**

The requirement for affordable housing as set out in CP4 extends to all types of residential development including retirement flats. A retirement flat comes within the same use class as residential (class C3) and is therefore subject to the same policy requirement to provide 25% affordable housing on schemes of five or more net additional dwellings

Care homes, residential and nursing homes (class C2) that do not provide individual units of self contained accommodation are not required to provide affordable housing.

For example, developments of student accommodation, in which the units are not self contained (where each unit shares a kitchen or bathroom), will not be expected to include provision for affordable housing. Where student accommodation units are self contained, they will be treated in the same way as general needs housing and the developer will be expected to provide 25% affordable housing.

Within schemes which include 25 units or more affordable housing provision, the Council will seek a 10% provision of fully adapted disabled units within the affordable housing. These homes should comply with a recognised and approved wheelchair design guide.

### **1.15 Housing Need**

The Council will refer to Housing Needs data held within the Choice Based Lettings System in the first instance.

In the event if further housing needs information is deemed necessary by the Borough's Housing Enabling Lead, the applicant will be expected to provide a local Housing Needs Survey for approval at their own cost.

Housing Needs Surveys should be undertaken through close liaison with the Parish Council and Housing Enabling Lead and should be of a standard to provide robust evidence.

### **1.16 Local Connection**

A local connection clause will be included in S106 agreements in relation to all schemes outside the Taunton and Wellington urban area to ensure that the Parish which is accommodating the development has priority access to the affordable homes which can contribute towards absorbing the Parish's housing need.

Where a scheme gives rise to a requirement for 25 affordable homes or more on one site a local connection clause is not required.

Maps of the Taunton and Wellington urban areas are available in **appendix 3**.

### **1.17 Occupancy**

Affordable housing for social rent and Affordable Rent secured through planning obligations will be allocated in accordance with the Choice Based Lettings System, Homefinder Somerset or such other register or scheme that may supersede the Homefinder Somerset Register.

Homefinder Somerset is the housing register of persons who have registered for and require affordable housing in the County of Somerset. It is jointly maintained by the five local authorities of Somerset being Taunton Deane Borough Council, Sedgemoor District Council, South Somerset District Council, Mendip District Council and West Somerset Council and can be found at <http://www.homefindersomerset.co.uk/>.

In the first instance, applicants for intermediate housing secured through the planning obligations will be taken from either Homefinder Somerset register or the Homebuy Agent list or such register of list that may supercede.

The Homebuy agent list is a list of applicants who are assessed as eligible to acquire Intermediate Housing properties from the relevant Registered Provider of Affordable Housing. It is compiled and maintained by the regional agent for the South West of England appointed by the Homes and Communities Agency .

In exceptional circumstances and in the event of there being no one available on the Homefinder Somerset Register or Homebuy agent list, any person approved in writing by the Housing Enabling Lead (such approval not to be unreasonably withheld).

## Appendix 1 – Affordable Housing SPD

### Annex 2 – National Planning Policy Framework – March 2012

#### Affordable housing

Social rented, affordable rented and intermediate housing, provided to eligible households whose needs are not met by the market. Eligibility is determined with regard to local incomes and local house prices. Affordable housing should include provisions to remain at an affordable price for future eligible households or for the subsidy to be recycled for alternative affordable housing provision.

**Social rented** housing is owned by local authorities and private registered providers (as defined in section 80 of the Housing and Regeneration Act 2008), for which guideline target rents are determined through the national rent regime. It may also be owned by other persons and provided under equivalent rental arrangements to the above, as agreed with the local authority or with the Homes and Communities Agency.

**Affordable rented** housing is let by local authorities or private registered providers of social housing to households who are eligible for social rented housing. Affordable Rent is subject to rent controls that require a rent of no more than 80% of the local market rent (including service charges, where applicable).

**Intermediate housing** is homes for sale and rent provided at a cost above social rent, but below market levels subject to the criteria in the Affordable Housing definition above. These can include shared equity (shared ownership and equity loans), other low cost homes for sale and intermediate rent, but not affordable rented housing.

Homes that do not meet the above definition of affordable housing, such as “low cost market” housing, may not be considered as affordable housing for planning purposes.

## Appendix 2 – Affordable Housing SPD

### Affordable Housing Registered Providers

#### Main Registered Provider Partners.

This is the primary level of the Partnership and the preferred developers of affordable housing in the Borough

- ***Curo (formerly Somer and Redland Housing)***

[www.curo-group.co.uk](http://www.curo-group.co.uk)

email: [enquiries@curo-group.co.uk](mailto:enquiries@curo-group.co.uk)

- ***DCH (formerly Devon and Cornwall Housing)***

[www.dchgroup.com](http://www.dchgroup.com)

- ***Knightstone Housing Association***

[www.knightstone.co.uk](http://www.knightstone.co.uk)

email: [talktous@knightstone.co.uk](mailto:talktous@knightstone.co.uk)

- ***Magna West Somerset***

[www.magnaws.org.uk](http://www.magnaws.org.uk)

email: [westsom@magna.org.uk](mailto:westsom@magna.org.uk)

- ***Yarlington Housing Group***

[www.yhg.co.uk](http://www.yhg.co.uk)

email: [first@yhg.co.uk](mailto:first@yhg.co.uk)

## Approved Development Partners

This is the secondary level of the Partnership for registered providers which have been vetted by the local authority

- ***Aster Group***

[www.aster.org.uk](http://www.aster.org.uk)

email: [info@aster.co.uk](mailto:info@aster.co.uk)

- ***Raglan Housing***

[www.raglan.org](http://www.raglan.org)

email: [development@raglan.org](mailto:development@raglan.org)

- ***SHAL Housing***

[www.shal.org](http://www.shal.org)

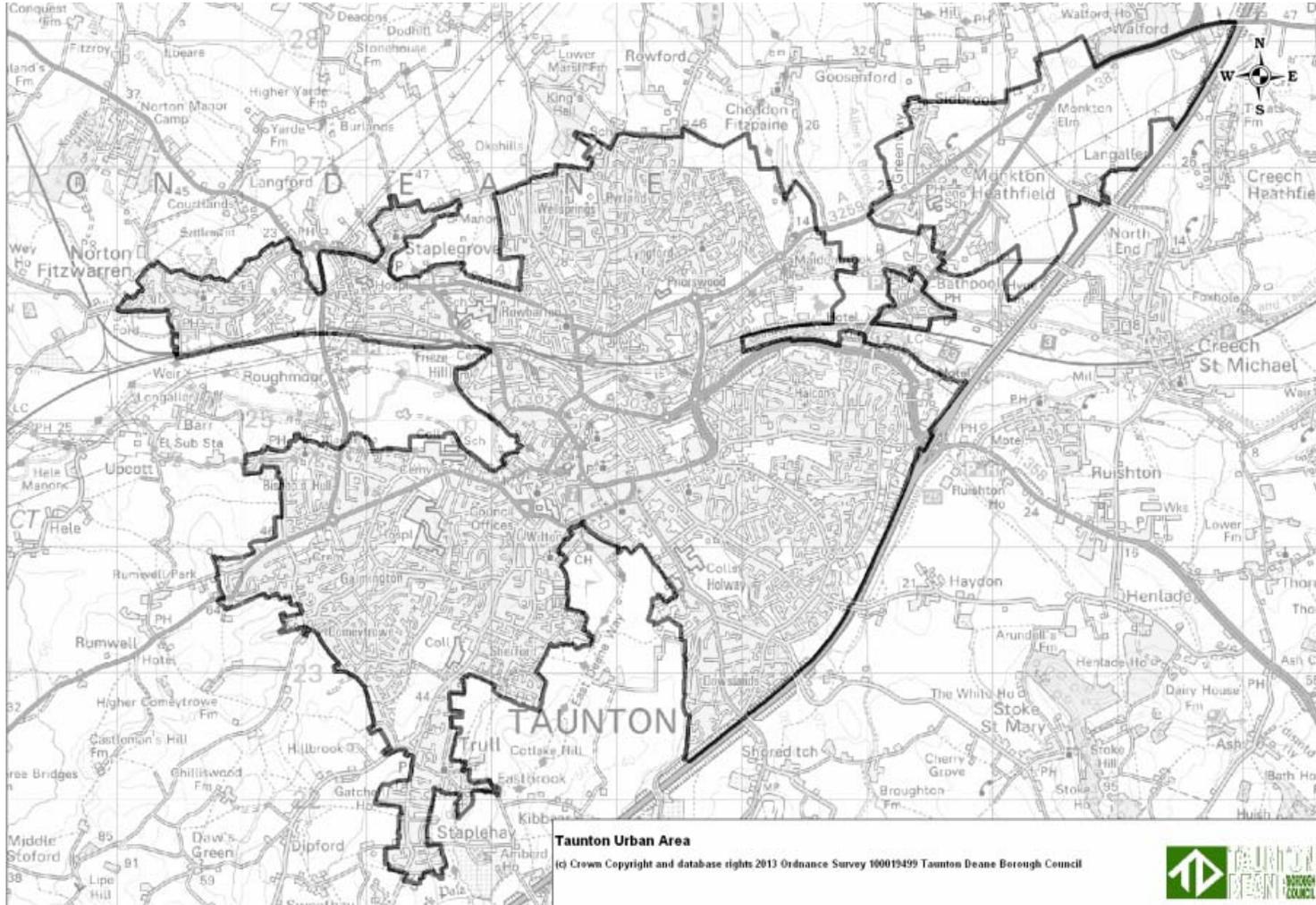
email: [information@shal.org](mailto:information@shal.org)

- ***Sanctuary Housing***

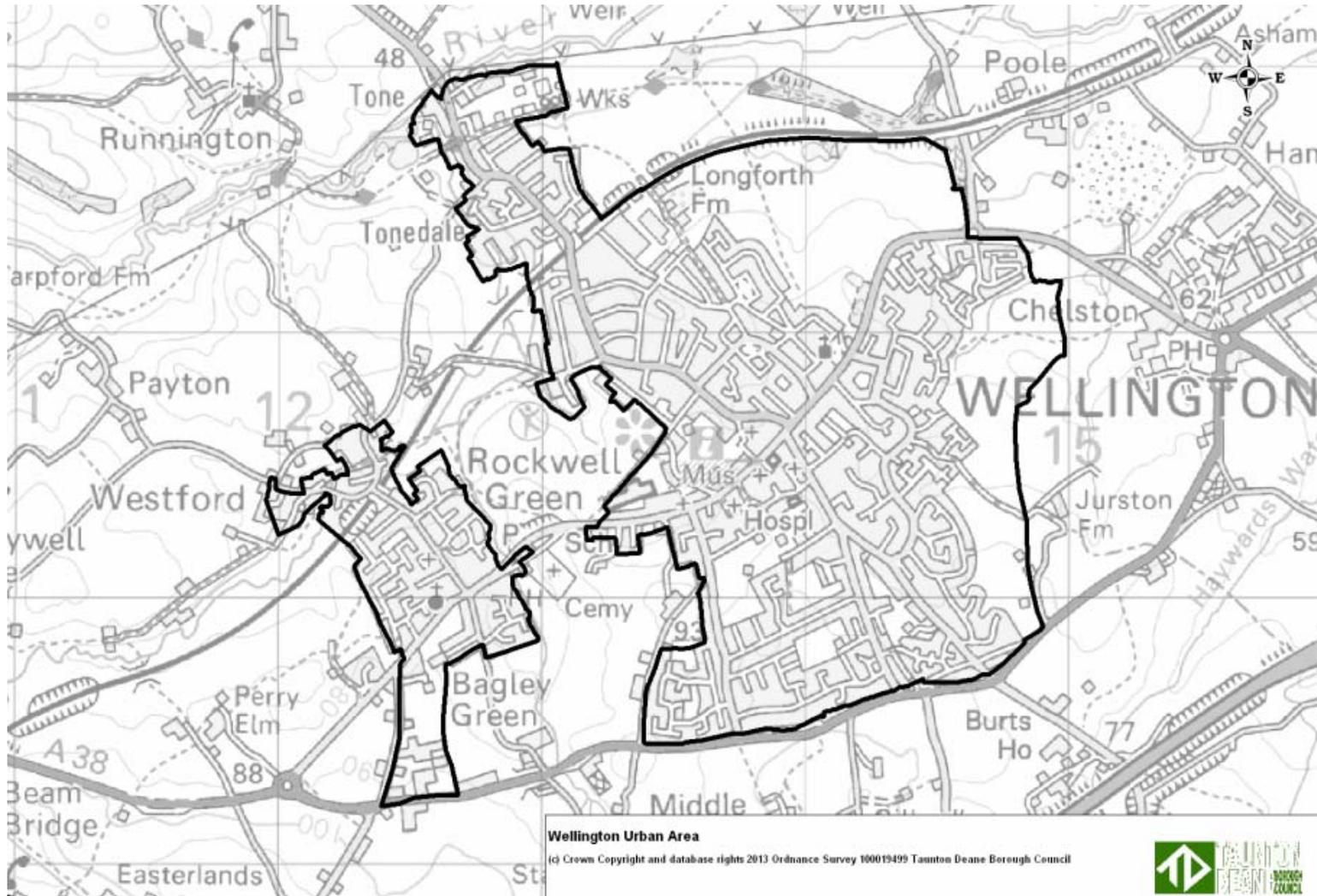
[www.sanctuary-group.co.uk](http://www.sanctuary-group.co.uk)

email: [contactus@sanctuary-housing.co.uk](mailto:contactus@sanctuary-housing.co.uk)

### Appendix 3 – Affordable Housing SPD Taunton Urban Area



## Wellington Urban Area



## Appendix 4 - Affordable Housing SPD

### Equality Impact Assessment – pro-forma

<b>Responsible person</b>	Jo Humble	<b>Job Title</b> Housing Enabling Lead
<b>Why are you completing the Equality Impact Assessment? (Please mark as appropriate)</b>	Proposed new policy/service	X
	Change to Policy/service	
	Budget/Financial decision – MTFP	
	Part of timetable	
<b>What are you completing the Equality Impact Assessment on (which, service, MTFP proposal)</b>	<b>Proposed adoption of Affordable Housing Supplementary Planning Document</b>	
<b>Section One – Scope of the assessment</b>		
What are the main purposes/aims of the policy/decision/service?	To provide guidance to be used in decision making relating to residential planning applications, where an affordable housing contribution is to be sought.	
Which protected groups are targeted by the policy/decision/service?	The policy is to facilitate the delivery of affordable housing in the Borough to those identified in housing need. It is not specific to a 'protected group'.	
What evidence has been used in the assessment - data, engagement undertaken – please list each source that has been used The information can be found on....	Homefinder Somerset Equality impact assessment TDBC Core Strategy Equality impact assessment Homes and Communities Agency equality objectives 2012-2015  Consultations for this report included the Housing Association partners, TDBC LDF Steering Group and Strategic Planning Working Group.	
<b>Section two – Conclusion drawn about the impact of service/policy/function/change on different groups highlighting negative impact, unequal outcomes or missed opportunities for promoting equality</b>		
Lettings will be taken from the choice based lettings system 'Homefinder Somerset' and potential purchasers will be registered through the Homebuy Agent, South West Homes. Both agencies have equality and diversity policies in place to ensure protected groups are		

not disadvantaged. Affordable homes should be built to the Homes and Communities Agency Design and Quality standards which gives consideration to equality.

Age – Provision is made within affordable housing development for all age groups, including specialist accommodation for younger and older persons.

Gender – no specific policy or mention in the text because no general inequalities were identified or known about to show disadvantage.

Sexual orientation - no specific policy or mention in the text because no general inequalities were identified or known about to show disadvantage.

Gender reassignment - no specific policy or mention in the text because no general inequalities were identified or known about to show disadvantage.

Pregnancy and maternity - no specific policy or mention in the text because no general inequalities were identified or known about to show disadvantage.

Religion /Belief - no specific policy or mention in the text because no general inequalities were identified or known about to show disadvantage.

Disability – Provision for disabled accommodation has been made within the policy to prevent disadvantage.

Race – Gypsy and Traveller sites are covered by separate Development Management policy (DM3) within the adopted Core Strategy, therefore this SPD is not applying consideration to Gypsy and Traveller sites.

<b>I have concluded that there is/should be:</b>	
No major change - no adverse equality impact identified	Evidence taken shows no potential for discrimination specific to protected groups
Adjust the policy/decision/service	
Continue with the policy/decision/service	
Stop and remove the policy/decision/service	
Reasons and documentation to support conclusions	
<b>Section four – Implementation – timescale for implementation</b>	
<b>Section Five – Sign off</b>	
Responsible officer Date	Management Team Date
<b>Section six – Publication and monitoring</b>	
Published on	
Next review date	Date logged on Covalent

### Action Planning

The table should be completed with all actions identified to mitigate the effects concluded.

<b>Actions table</b>						
<b>Service area</b>				<b>Date</b>		
<b>Identified issue drawn from your conclusions</b>	<b>Actions needed</b>	<b>Who is responsible?</b>	<b>By when?</b>	<b>How will this be monitored?</b>	<b>Expected outcomes from carrying out actions</b>	

# Taunton Deane Borough Council

**Executive – 9 October 2013**

## **Site Allocations and Development Management Plan – Preferred Option**

### **Report of the Policy Lead Officers**

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

#### **1. Executive Summary**

This Report recommends the publication of the Council's Preferred Options Site Allocations and Development Management Plan. The Plan represents an important planning policy document which identifies future areas of growth within the Borough and detailed Development Management policies to guide decision-making.

Subject to approval, the document will be subject to at least six weeks public consultation including a series of public exhibitions in communities likely to be most affected by development. A revised Statement of Community Involvement will also be consulted upon.

The Preferred Options stage has been reached following extensive early consultation with the public and key stakeholders. It is informed by a detailed assessment of the sustainability of different policy options (the Sustainability Appraisal).

The Plan proposes the identification of strategic urban extensions at Comeytrowe/Trull and Staplegrove as well as a series of smaller allocations at Taunton including Ford Farm, Norton Fitzwarren.

No further development is proposed for Wellington through the Plan. Preferred sites are identified at the Major Rural Centres, where in the case of Wiveliscombe a significant proportion of the development is committed.

In the Minor Rural Centres, Officers have taken into account a number of important factors including character and size of settlements before arriving at the scale of development to be accommodated at each centre. Appropriate sites have been identified in each centre reflecting the findings of the SA.

The Plan also includes a number of proposed new and replacement Development Management policies to complement those established through the adopted Core Strategy.

Some small scale changes to settlement boundaries are also proposed where they are considered to be logical and appropriate.

## **2. Background**

- 2.1 This Report recommends the publication of the Council's Preferred Options Site Allocations and Development Management Plan (SADMP) for public consultation. The Plan is included at Appendix 1 to this Report. The SADMP represents an important Planning Policy Document; it will guide the future location of development across the Borough and establish policies used to inform decision-making through the Development Management process.
- 2.2 The SADMP represents the third Development Plan Document being progressed to adoption and follows the Taunton Town Centre Area Action Plan (TTCAAP), adopted in 2008 and the Borough's Core Strategy adopted in 2012. The Plan is complementary to the existing DPDs prepared by the Council and will help to ensure that the Borough benefits from full and comprehensive planning policy coverage.
- 2.3 Planning Regulations guide Officers in the procedure to follow in preparing DPDs. This procedure requires that the Council undertakes consultation prior to the publication of its Draft Plan, which itself is subject to a more formalised representation period prior to its examination by an independent planning inspector and adoption.
- 2.4 Officers undertook an initial 'Issues and Options' consultation on the SADMP in early 2013. This took the form of a series of public exhibitions across the Borough and gave an opportunity for communities, developers, landowners and other key stakeholders to comment on a range of sites and policy options.
- 2.5 Officers have now had the opportunity to consider the responses made through the Issues and Options consultation. A report of the consultation was published in Spring 2013. Having reflected on the substantive issues raised through the consultation, Officers have now drafted the recommended Preferred Options SADMP. Subject to the agreement of Scrutiny and Executive, the Plan will be published for public consultation towards the end of October. This stage of the Plan is referred to as the Regulation 18 stage under the Local Plans Regulations.

## **3. Preferred Options Site Allocations and Development Management Plan**

- 3.1 The attached SADMP Preferred Options document sets out Officers preferred sites for allocation and policy directions to be followed through detailed development management policies. The Plan has been through the LDF Steering Group prior to its presentation at Scrutiny and Executive.

### *How the Preferred Options are Identified*

- 3.2 Officers have carefully considered the representations made through the Issues and Options consultation and where necessary, sought additional information and clarification from key stakeholders like the Environment Agency and County Council.
- 3.3 The options put forward in respect of both sites and policies have been subject to detailed consideration through a Sustainability Appraisal (SA). The SA is an integral part of plan-making and allows us to consider the likely sustainability implications of choosing a particular policy direction as well as possible mitigation measures.
- 3.4 The Sustainability Appraisal is appended to this Report at Appendix 2. It shows how the options considered perform against a number of sustainability objectives. These objectives address environmental, economic and social implications associated with different options.
- 3.5 Officers have not appended the detailed appendices that underpin the SA to this Report. This is because these appendices contain a significant amount of detailed information that would otherwise substantially increase the length of this Report and its supporting documents. The full SA and supporting appendices will be published for consultation alongside the Preferred Options SADMP.
- 3.6 The identified Preferred Options reflect the findings of the SA but also the deliverability of particular options since National Planning Policy Framework places significant weight on the deliverability of plans.

### *Preferred Options for Taunton:*

- 3.7.1 Central to the Preferred Options for Taunton is the proposed allocation of two strategic site allocations at Comeytrowe/Trull and Staplegrove. Both of these sites were identified as 'Broad Locations' within the adopted Core Strategy and anticipated to be allocated in the SADMP.
- 3.7.2 The Council has recently commissioned consultants Parsons Brinckerhoff to undertake further technical work to inform the proposed allocations at both Broad Locations. Several potential options have been identified and considered for Comeytrowe/Trull and Staplegrove. This work has helped to inform the proposed 'red-line' boundaries identified for both allocations.
- 3.7.3 Officers would propose the allocation of both sites on the basis outlined within the SADMP. In both cases, there is a clear and apparent need for comprehensive masterplanning to inform future planning proposals. In the event that applications are promoted in either Broad Location ahead of the Plan's adoption, the Council will need to be satisfied that appropriate masterplanning has been undertaken, consistent with the

requirements of Core Strategy policies SS6 and SS7.

- 3.7.4 The Core Strategy also identified the need for a new strategic employment site at the Town. The SADMP proposes a second strategic employment site at Junction 25/Ruishton. This site would serve the qualitative need for future employment growth to enable Taunton to fulfil its full economic potential.
- 3.7.5 In addition to the Broad Locations, the Council needs to identify a range of smaller sites to help ensure that the new homes target of at least 13,000 new homes within the Town over the Plan period can be met. This is particularly critical given the acknowledged high degree of reliance that the Plan would otherwise have upon the strategic sites at: Monkton Heathfield (c. 4,500 homes), Nerrols (c. 900 homes), Staplegrove (c. 1,000 homes) and Comeytrowe/Trull (c. 2,000 homes). Moreover, Officers are aware that some of the sites identified by the TTCAAP may not now yield the number of residential units envisaged by that Plan.
- 3.7.6 Ford Farm has previously been identified by Officers as a sustainable site for allocation. Whilst the site currently lies within Flood Plain, its identification for development would see the completion of a flood scheme, channel work improvements and ground-raising. These works will complement the wider Norton Fitzwarren flood risk management strategy (The Dam and channel widening works through the former Cider Factory) and ensure that new properties at Ford Farm are protected to a 1 in 100 year plus climate change standard of protection. It would also secure the completion of the Norton Bypass which would reduce traffic through the heart of the Village. Officers would therefore strongly recommend the inclusion of this site within the Preferred Options Plan.
- 3.7.7 Officers would recommend that land at Longrun Farm and St Augustines School is safeguarded in the Plan for potential future education uses at this stage. Both of these sites perform very well against the sustainability objectives identified in the SA, however, in view of on-going uncertainty around secondary school provision in the Town, Officers feel it would be premature to release these sites for housing without prior assurance that the sites could not be used for education uses. In the event that it can be demonstrated that land at Longrun is not suitable for education uses and/or St Augustines is surplus to requirements then both sites would be suitable for accommodating housing or mixed-use schemes.
- 3.7.8 Land at Bishops Hull is proposed for c. 70 dwellings. The site's development would be dependent on addressing improvements to surface water drainage at Chute Water. Officers are also proposing the allocation of a small site at Pyrland Hall Farm for up to 60 units. This site would need to be sensitively designed to respect the setting of the Listed Farm complex and also provide appropriate mitigation for

Lesser Horseshoe Bats and landscaping.

- 3.7.9 Detailed work addressing the proposed Urban Extension at Comeytrove/Trull has also identified the potential for a development at Higher Comeytrove Farm. This site can only logically come forward after an initial northern phase of an Urban Extension at the A38 has been delivered and would have potential for up to 150 dwellings.
- 3.7.10 A small site at Kingston Road is also proposed for inclusion. This site lies within the existing settlement limits and is compliant with development plan policies. It is anticipated that this site could yield 10 dwellings.

*Preferred Options for Wellington:*

- 3.8.1 In view of the number of plots already consented and delivered within the Town, Officers do not consider it appropriate to make any further allocations through the SADMP. Even without making any allowance for future 'windfall' unplanned development, the housing trajectory indicates a projection of more than 2,800 new homes over the Plan period set against the Core Strategy target of at least 2,500.

*Preferred Options for the Major Rural Centres:*

- 3.9.1 The Core Strategy identifies Wiveliscombe and Bishops Lydeard as 'Major Rural Centres' to accommodate up to 200 new homes through allocations.
- 3.9.2 In Wiveliscombe planning permission or resolutions to grant planning have been made on land in and around Style Road / Burges Lane. These sites will deliver around 120 of the 200 homes envisaged by the Core Strategy. Officers most favoured site without planning permission is land at Croft Way. This site was identified in an earlier 2010 consultation as the Council's preferred site. It would represent a logical rounding of the Town and adjoins the recently constructed Doctor's Surgery.
- 3.9.3 Sites at the southern end of Bishops Lydeard were strongly favoured through the Issues and Options consultation. These sites would not exacerbate congestion and parking problems through the heart of the Village and it is principally on this basis that Officers would recommend these sites for allocation through the SADMP.

*Preferred Options for the Minor Rural Centres:*

- 3.10.1 Five Minor Rural Centres were identified in the Core Strategy; at Creech St. Michael, Cotford St. Luke, Milverton, North Curry and Churchinford. These villages were anticipated to accommodate allocations of at least 250 new homes between them.

3.10.2 We have carefully considered the character, setting, size and capacity of key infrastructure prior to recommending the following apportionment of new homes across the Minor Rural Centres:

- Creech St. Michael c. 110
- Cotford St. Luke c. 60
- Milverton c. 20
- North Curry c. 40
- Churchinford c. 20

3.10.3 Officers considered that the three sites which now benefit from planning permission in Creech in and around Hyde Lane represent the most appropriate options to accommodate development. No further sites will be identified here.

3.10.4 In Cotford, Officers preference is to see land to the east of the settlement, a combination of Sites 2 and 3 as the Preferred Option. This would help limit the extent of encroachment into the surrounding countryside on the eastern parts of both sites. A vehicular though route linking both sites with the southern and northern ends of Dene Road would be required. The Highway Authority have concerns that the southern end of Dene Road (north of Dene Barton) may not be suitable for vehicular access without improvement. The Council will require evidence from the site owner through this current consultation that such a route is achievable to the satisfaction of the Highway Authority and is financially deliverable without detriment to other planning requirements for the allocation. If this cannot be demonstrated the Council will progress an allocation on site 2 only as this can be readily achieved from Dene Road (north).

3.10.5 Officers consider that a small development of up to 20 dwellings at Butts Way, Milverton should be identified through the SADMP. Whilst this site is less accessible than some of the options identified, its likely impact on landscape, nature conservation and historic character is lesser.

3.10.6 The preferred sites for North Curry are Overlands and land off Knapp Lane. Overlands performs well against the SA criteria although it will be important to ensure that any new development provides appropriate footpath links to the Heart of the Village and protects the sensitive setting of the Grade 2\* Listed Farm Complex. The site is considered likely to accommodate up to 20 units.

3.9.7 Knapp Lane can accommodate the remaining 20 homes for North Curry. The site is well contained in the landscape, is reasonably accessible to the Village's services and facilities and can be acceptably accessed in the opinion of the Highways Authority.

3.9.8 Officers do not feel it appropriate to recommend land at White Street for inclusion despite the support of the Parish Council. This site has

previously been dismissed at Appeal and was recently refused planning consent on the grounds of impact on the setting of the Listed Buildings.

- 3.9.9 Ford Farm was the only site identified for potential allocation through the SADMP and Issues and Options consultation. It is proposed to accommodate up to 20 units and will need to be carefully designed to minimise impact on the AONB.

*Development Management Policies:*

- 3.9 In the case of more detailed DM policies, Officers have considered carefully the need for additional policies taking into account the Framework, our existing Local Plan policy coverage and the Government's desire to avoid un-necessary policy duplication.
- 3.10 The Preferred Options have structured a limited number of proposed new and carried forward Local Plan policies against the eight strategic objectives framed by the adopted Core Strategy namely:

- Climate Change
- The Economy
- Town and Other Centres
- Housing
- Inclusive Communities
- Accessibility
- Infrastructure
- Environment

- 3.11 Officers have also considered it appropriate to propose a series of design policies to help guide and inform planning proposals.

*Proposed Changes to Settlement Boundaries:*

- 3.12 The SADMP process also presents an opportunity to consider the appropriateness of existing settlement boundaries. These boundaries were established through the Local Plan, adopted in 2004. Consequently we have consulted on the need to make logical changes to the existing boundaries of the Borough's urban areas.
- 3.13 Through the Issues and Options consultation a significant number of potential amendments were put forward. Officers have now had the opportunity to consider each of the responses and would recommend a small number of changes as set out in the Plan.

*Gypsy and Traveller Pitch Provision:*

- 3.14 The Council has recently commissioned an update to the 2010 Gypsy and Traveller Accommodation Assessment. Whilst the findings of this Report will be reported to Members separately to the SADMP, given

that the commission will identify long-term requirements beyond 2028, this will undoubtedly increase the strategic targets for gypsy and traveller provision.

- 3.15 The adopted Core Strategy stated that provision for gypsy and traveller sites would be made through the SADMP. Unfortunately, to-date no sites have been promoted for such uses despite numerous 'calls for sites' and requests for land to be put forward.
- 3.16 The failure to identify potential sites in part can probably be traced back to landowner expectations. Many landowners and site promoters will understandably want to maximise the return from any site and consequently not wish to promote land for gypsy and travellers where 'hope value' exists.
- 3.17 Since we have now reached a relatively advanced stage, identifying preferred options for allocation it seems appropriate to re-consult one more time with a view to identifying sites. Officers propose to contact those who have previously promoted land for allocation with a view to identifying sites which could be considered for gypsy and traveller pitches.
- 3.18 In the event that some landowners are prepared to promote land for pitches, the Council would need to consider these sites against its criteria-based Core Strategy policy. Further public consultation would then need to be undertaken on these sites.
- 3.19 Whilst this exercise may not necessarily yield any further sites for consideration (and ultimately sites that *could* be allocated through the SADMP), Officers consider this exercise as quite important in taking steps to ensure the soundness of the SADMP. Failure to take proactive steps to identify land for gypsies and travellers would not only represent a significant risk to the Development Plan but also increase the potential of planning permissions being granted at appeal on sites the Council may wish to resist.

#### **4. The Statement of Community Involvement**

- 4.1 The Statement of Community Involvement (SCI) sets out how Taunton Deane Borough Council will involve the community and stakeholders in the preparation, alteration and review of local planning policy and the consideration of planning applications.
- 4.2 The Council's last SCI was produced in 2007 and is consequently now out-of-date. To this end Officers have now reviewed the SCI. The 2013 draft SCI is appended to this Report and is included at Appendix 3.

4.3 The 2013 review simplifies the 2007 SCI document. It takes account of changes to planning policy nationally and the way in which the Council is structured and organised. The aim is to create a clear and concise document which sets out:

- When and how people can get involved with the preparation of local planning policy and comment on planning applications;
- How the Council will notify people of the opportunity to engage with the planning policy and development management process.

4.4 Officers propose that the Council should consult on this new draft SCI at the same time as the SADMP and draft Affordable Housing SPD. The statutory national stakeholders, local stakeholders and interested parties will have the opportunity to comment on the draft document. In addition this is a key opportunity to gauge the views of disabled and minority groups in the Deane to ensure our strategy for consultation helps them to engage in the preparation of local planning policy and comment on planning applications.

## **5. What Happens Next?**

5.1 Subject to the agreement of the Scrutiny and Executive Committees, Officers intend to publish the Preferred Options for consultation towards the end of October. The consultation will run for a period of not less than six weeks and will comprise a series of public consultation events to be undertaken in a range of locations likely to be affected by the growth planned by the SADMP.

5.2 Beyond the Preferred Options, Officers will consider the further comments made in respect of the Plan and undertake further evidence gathering required to support the document.

5.3 A separate report has been prepared outlining the Project Plan for preparation of the SADMP. This is referred to as the Local Development Scheme and anticipates that the Draft Plan will be published in Summer 2014. The SADMP is likely to be adopted in Spring 2015 following independent examination in early 2015.

## **6. Finance Comments**

6.1 The SADMP will help to deliver the growth agenda established in the adopted Core Strategy, helping to attract inward investment into the Borough. The Government's New Homes Bonus scheme rewards new housing completions by matching Council Tax on additions to housing stock over a six year period. Subject to the Council's adoption of Community Infrastructure Levy, the development sites identified in the

SADMP will help to secure a significant level of planning contributions over the Plan period.

## **7. Legal Comments**

- 7.1 Upon adoption, the SADMP will form part of the Statutory Development Plan for the Borough. As such it will be the starting point for the determination of many future planning applications.

## **8. Links to Corporate Aims**

- 8.1 The SADMP will help to deliver both the Corporate Vision and three aims of the Corporate Business Plan:

*Vision: Taunton Deane is known nationally as a quality place that is growing and developing sustainably, with a vibrant economic, social and cultural environment*

*Aim 1: Quality sustainable growth and development*

*Aim 2: A vibrant economic environment*

*Aim 3: A vibrant social, cultural and leisure environment*

- 8.2 The Plan identifies sustainable development in the most appropriate locations. It also enables the economy to grow through the recognition of new employment opportunities and the jobs provided by the construction industry. The policies set by the Plan will help to ensure a vibrant social, cultural and leisure environment.

## **9. Environmental Implications**

- 9.1 The SADMP contains policies addressing and responding to climate change, the environment, reducing the need to travel and the sustainable use of resources and design. A separate Sustainability Appraisal has been used to help inform the formulation and refinement of the Preferred Options.

## **10. Community Safety Implications**

- 10.1 Policies on Inclusive Communities and Design will help to ensure community safety considerations are taken into account in decision-making on planning applications. These complement adopted Core Strategy policy CP5: Inclusive Communities.

## **11. Equalities Impact**

11.1 An Equalities Impact Assessment was undertaken on the Core Strategy. As the Preferred Options are further refined into the Draft Plan, a further EqIA will be undertaken.

## **12. Risk Management**

12.1 The SADMP is a high priority in the Growth and Development Service Plan. Officers have undertaken Risk Assessment through both service-planning and to inform the Council's Local Development Scheme.

## **13. Partnership Implications**

13.1 Whilst the SADMP is prepared by Officers on behalf of the Council, its policies, proposals and allocations can only be delivered in partnership with key stakeholders, the development industry and our communities.

## **14. Recommendations**

14.1 The Executive is recommended to:-

- a) Note the contents of the Site Allocations and Development Management Plan Preferred Options;
- b) Agree that the Site Allocations and Development Management Plan be published for consultation as soon as is practicable (subject to any necessary minor amendments to be agreed with the Portfolio Holder);
- c) Agree that independently of the Preferred Options consultation, officers be authorised to write to the promoters of appropriate sites not proposed to be included for allocation in the Plan to ascertain if these sites could be considered for gypsy and traveller pitch provision; and
- d) Approve publication of the Council's revised Statement of Community Involvement for consultation alongside the Site Allocations and Development Management Plan.

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# **Sustainability Appraisal of regulation 18 consultation**

## **Volume 1**

The principles of sustainable development are at the heart of the planning system. The sustainability appraisal (SA) process is intended to ensure that through plan-making, Local Planning Authorities have considered social, environmental and economic concerns when producing Local Development Frameworks.

Under Section 39(2) of the *Planning and Compulsory Purchase Act 2004* (as amended by the *Planning Act 2008* and *Localism Act 2011*)<sup>1</sup>, the carrying out of SA is mandatory on any new or revised Development Plan Documents (DPDs). In addition to the SA requirement, Local Planning Authorities are also required by law to conduct an environmental assessment in accordance with the requirements of *European Directive 2001/42/EC*. This Directive “on the assessment of the effects of certain plans and programmes on the environment or ‘SEA Directive’” is outlined in detail in the *Environmental Assessment of Plans and Programmes Regulations 2004* (the SEA regulations). Planning Policy Framework under Plan Making indicates that a Sustainability Appraisal which meets the requirements of the European Directive on strategic environmental assessment should be an integral part of the plan preparation process, and should consider all the likely significant effects on the environment, economic and social factors. Appendix 1 outlines where this draft Sustainability Appraisal Scoping Report (and indeed, subsequent Sustainability Appraisal Reports) fulfils the SEA Directive’s requirements.

The Taunton Deane Site Allocations and Development Management Policies Plan and subsequent SA will be prepared in accordance with the legal and planning framework making use of the Government’s guidance: *Sustainability Appraisal of Regional Spatial Strategies and Local Development Documents* ODPM, 2005 but also takes into account the 2008 legislative changes. The Development Plan Document (DPD) component of this guidance has been replaced by sustainability appraisal guidance for DPDs in the CLG Plan Making Manual launched in September 2009. This is authored by Communities and Local Government and hosted by the Planning Advisory Service (PAS).

The document provides a useful and easy to follow structure to ensure that SA is well-integrated within plan-making and is divided into five key stages summarised below:

Stage A: Setting the context, establishing the baseline and deciding on the scope (**a Sustainability Appraisal Scoping Report was produced in January 2013, this was subject to public consultation along with the SADMPP. The SA Scoping was also subject to statutory consultation with Natural England, the Environment Agency and English Heritage. The document can be reviewed through our website at:**

Stage B: Developing and refining options and assessing effects (**this Report represents Stage B**)

Stage C: Preparing the Sustainability Appraisal Report.

Stage D: Consulting on the Development Plan Document and Sustainability Appraisal Report.

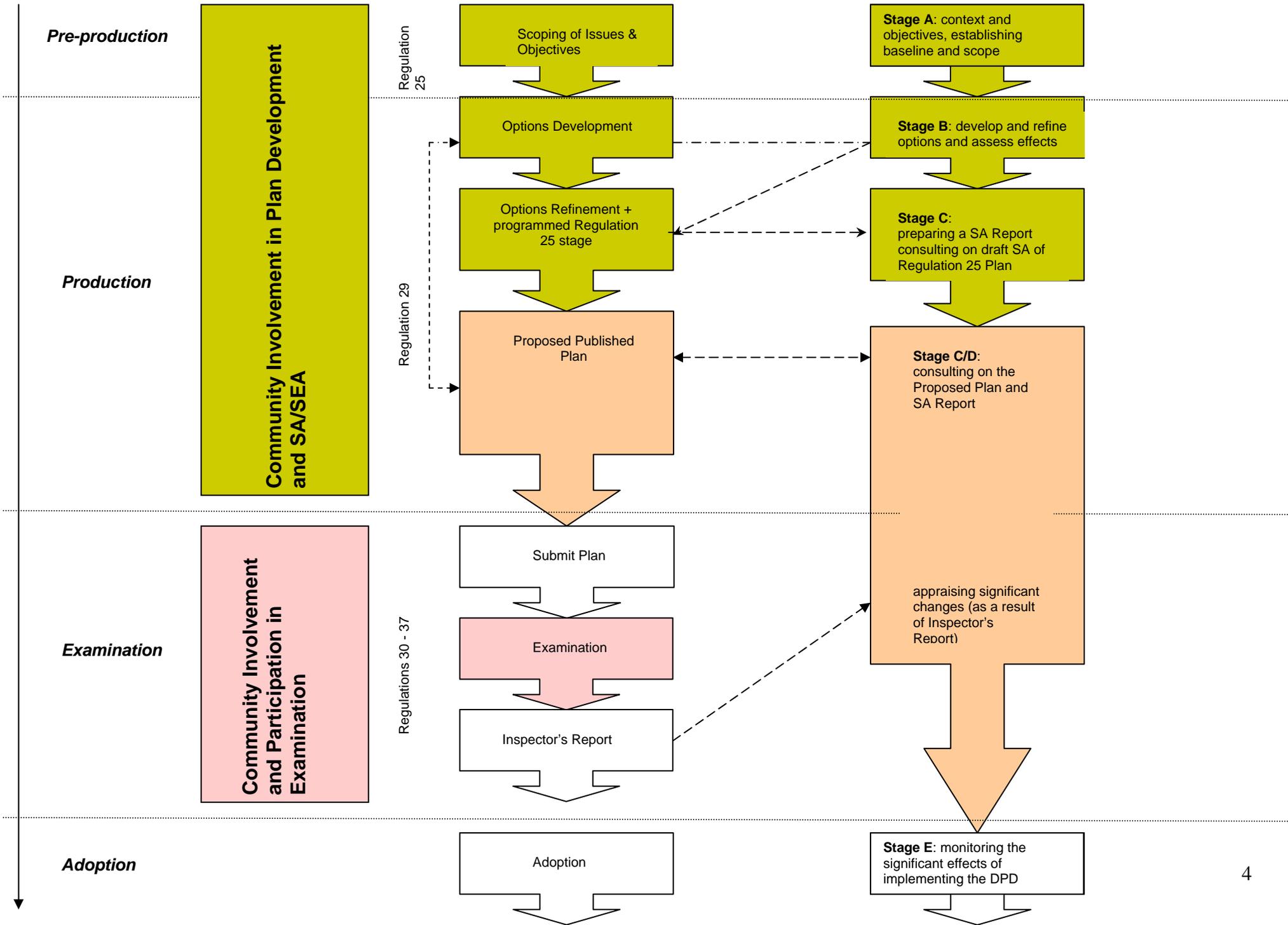
Stage E: Monitoring the significant effects of implementing the Development Plan Document

The diagram on the following page gives an indication as to how the Sustainability Appraisal process will be integrated into plan-making. We will test the Core Strategy through SA and it will evolve in response to the SA’s results. The SA process will inform key decisions on plan-making

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<sup>1</sup> Further changes to the Planning and Compulsory Purchase Act 2004 were introduced by the Localism Act 2011. Any of the amendments to the Act, however, do not relate or change the requirement of Local Authorities in producing an SA.

in a timely way, consistent with the milestones set out in the Council's Local Development Scheme.



Stages A-E of the Sustainability Appraisal process are sub-divided into a number of tasks which should be completed in order to satisfy the SA and SEA requirements. These stages and the tasks associated with them are defined in more detail below:

Stage	Task	Purpose
<p><b>Stage A:</b> Setting the context and objectives, establishing the baseline and deciding on the scope (we are here)</p>	<p>A1: Identifying other relevant plans, policies, programmes, and sustainability objectives.</p>	<p>To document how the plan is affected by outside factors and suggest ideas for how any constraints can be addressed.</p>
	<p>A2: Collecting baseline information.</p>	<p>To provide an evidence base for sustainability issues, effects and monitoring.</p>
	<p>A3: Identifying sustainability issues.</p>	<p>To focus the SA and streamline subsequent stages, includes baseline information analysis, setting of the SA framework, prediction of effects and monitoring.</p>
	<p>A4: Developing the SA framework.</p>	<p>To develop a means by which sustainability of a plan can be appraised.</p>
	<p>A5: Consulting on the scope of the SA.</p>	<p>To consult with statutory bodies to ensure SA covers key sustainability issues.</p>
	<p>B1: Testing the DPD objectives against the SA framework.</p>	<p>To ensure that DPD objectives accord with sustainability principles and identify any conflicts between DPD objectives. This will help refine DPD objectives as well as developing options</p>
	<p>B2: Developing the DPD options.</p>	<p>To identify a range of development options which can be assessed against the SA framework.</p>
	<p>B3: Predicting the effects of the DPD.</p>	<p>To predict the social, environmental and economic effects of the options being considered in the DPD</p>

Stage	Task	Purpose
<p><b>Stage B:</b> Developing and refining options and assessing effects</p>	<p>B4: Evaluating the effects of the DPD.</p>	<p>process. Potential effects should be quantified where possible.</p> <p>To evaluate the significance of the likely effects of the DPD.</p>
	<p>B5: Considering ways of mitigating adverse effects and maximising beneficial effects.</p>	<p>To identify measures to prevent, reduce or offset significant adverse effects of implementing the DPD.</p>
	<p>B6: Proposing measures to monitor the significant effects of implementing the DPD.</p>	<p>To identify a means by which to monitor actual significant effects of implementation of DPD against those predicted by the SA.</p>
<p><b>Stage C:</b> Preparing the Sustainability Appraisal Report</p>	<p>C1: Preparing the Sustainability Appraisal Report.</p>	<p>This Report on the draft DPD is a key output in the SA process. It should clearly show how SEA directive requirements have been met.</p>
	<p>D1: Public participation on the preferred options of the DPD and the Sustainability Appraisal Report.</p>	<p>To provide the public with the opportunity to comment on not only the draft plan but also the SA and its findings.</p>
	<p>D2(i): Appraising significant changes.</p>	<p>To ensure any changes that are made between the draft DPD and it being submitted must be appraised in terms of their sustainability impact.</p>
<p><b>Stage D:</b> Consulting on the preferred options of the DPD and the Sustainability Appraisal Report</p>	<p>D2(ii) Appraising significant changes resulting from representations.</p>	<p>To ensure that any changes made to the DPD following binding recommendations of an Inspector are appraised in terms of their sustainability impact.</p>
	<p>D3: Making decisions and providing information.</p>	<p>To ensure that an adopted DPD has taken into account the findings of the SA process in full.</p>

Stage	Task	Purpose
<b>Stage E:</b> Monitoring the significant effects of implementing the DPD.	E1: Finalising aims and methods for monitoring.	To ensure that the monitoring information gathered is appropriate, up-to-date and reliable.
	E2: Responding to adverse effects.	To ensure that when a plan results in adverse effects the Local Planning Authority can take action.

The remainder of this Scoping Report has been sub-divided with a separate section for each of the discrete tasks associated with Stage A of the sustainability appraisal.

## A4: Developing the Sustainability Appraisal Framework

### Identifying Objectives

By completing tasks A1 – A3 we have developed a key understanding of the main sustainability issues for Taunton Deane. From this understanding we have drafted the following sustainability objectives to reflect the main issues. The sustainability objectives are structured to reflect the 8 strategic objectives and core policies in the adopted Taunton Deane Core Strategy 2011-2028. An additional objective on design has been included to reflect the Council's priorities for sustainable design and construction.

Climate Change:

- Objective:**
- 1a) *'To consider, mitigate and adapt to the possible effects of climate change'*.
  - 1b) *'To promote the usage of renewable sources of energy'*.
  - 1c) *'To reduce the flood risk and the threat to people and property'*.

- Justification:**
- 1) The implications and threat posed by climate change has been well documented. In recent years there has been a policy shift towards promotion of renewable sources of energy. Flood risk is a critical climatic factor in its own right, and this is reflected in the significant number of existing properties and urban areas within areas of greatest risk as well as likely future development pressures on such areas.

Economic development:

- Objective:**
- 2) *'To foster an entrepreneurial economy with improved productivity, providing a strong employment offer'*.
- Justification:**
- 2) Average earnings and productivity levels are low and should be addressed.

Town and Other Centres:

- Objective:**
- 3) *'To strengthen and safeguard the vitality and viability of our town centres'*.
- Justification:**
- 3) The importance of protecting the vitality and viability of town centres is reflected in national planning policy framework. The adopted Taunton Deane Core Strategy sets out the hierarchy of centres within the Borough to support development appropriate to their role and function. Proposals for main town centre uses will be assessed sequentially in order to support the vitality and viability of centres and promote easy access to services.

## Housing

- Objective:** 4 a) *'To provide and maintain a sufficient supply of good quality, mixed housing, including an appropriate level of affordable housing to meet local needs and strategic housing requirements'.*
- 4 b) *'To ensure sustainably balanced places are created and maintained providing access to an appropriate mix of services and facilities'.*
- Justification:** Affordability of housing is a major problem and needs to be addressed through supply of appropriate housing in line with the affordable housing targets as set out in the adopted Taunton Deane Core Strategy.

## Inclusive Communities

- Objective** 5 a) *'To reduce inequalities and promote the quality of life, health and well-being for all residents of the Borough.*
- 5 b) *'To ensure cultural, leisure and recreational provision is readily accessible for all.*
- Justification:** We need to consider the implications of our plans on the quality of life, health and well being of all our residents. This has increasingly been reflected in the shift towards spatial planning.

## Accessibility:

- Objective** 6) *'To minimise the need to travel (particularly by car), and facilitate more sustainable forms of transport'.*
- Justification** 6) Development needs to mitigate against climate change and address social exclusion of those residents without car ownership. There is a clear link between sustainable transport modes (cycling and walking) and public health.

## Infrastructure:

- Objective** 7) *'To ensure that development provides or contributes to the physical, green and social infrastructure that is necessary for the development to proceed and to mitigate the impact of existing communities and the environment'.*
- Justification:** 7) The needs of our residents are diverse and we need to ensure we cater for all of them. This means providing access to education, shops and services, recreational provision, flood alleviation and transport schemes - all of which will be shaped by future housing provision.

## Environment

### **Objective**

- 8 a) *'To protect, conserve and enhance the Plan Area's natural habitats, species and biodiversity'.*
- 8b) *'To preserve and enhance the character and quality of the Borough's landscape'.*
- 8c) *'To preserve and enhance the Borough's built environment, heritage and archaeology'.*

### **Justification**

- 8) There are several protected species in Taunton Deane as well as wildlife sites of international, national and local importance. Much of the Borough's natural environment is valued and should be protected for current and future generations. Much of our built and natural heritage is valued. The recognised through national and local designations and contributes to the high quality environment.

## Design

### **Objective**

- 9) *'To encourage sustainable design and practise'.*

### **Justification**

- 9) The perceived character of Taunton Deane is substantially influenced by the design and layout of buildings and streetscapes. The National Planning Policy Framework and the adopted Core Strategy emphasise that good design is a key aspect of sustainable development, and should contribute positively to making places better for people.

## Testing the compatibility of SA objectives

Our SA objectives have been chosen to reflect the remit of the LDF as a spatial plan. They cannot hope to adequately cover all of the sustainability issues identified from baseline information as these will in part need to be addressed through the plans, policies and programmes produced by others within the Council, or indeed outside bodies and our key partners. To ensure that each of the objectives are genuinely needed and that none duplicate or overlap each other a simple framework has been set up.

The framework tests the internal compatibility of objectives against one another and reveals any incompatibilities or tensions between the individual objectives.

	1a	1b	1c	2	3	4a	4b	5a	5b	6	7	8a	8b	8c	8c
1a															
1b	✓														
1c	✓	✓													
2	•	•	•												
3	•	•	•	✓											
4a	•	•	•	•	?										
4b	✓	•	•	✓	✓	✓									
5a	✓	•	•	✓	✓	✓	✓								
5b	✓	•	•	✓	?	•	✓	✓							
6	?	•	•	•	✓	?	✓	✓	✓						
7	✓	•	✓	✓	✓	✓	✓	✓	✓	✓					
8a	?	×	✓	•	✓	×	•	✓	✓	?	✓				
8b	?	×	✓	•	✓	×	•	✓	?	•	✓	✓			
8c	•	•	•	•	✓	?	•	✓	?	•	•	•	•		
9	✓	✓	✓	✓	✓	✓	•	✓	?	•	•	✓	✓	✓	✓

**Key:**

- ✓ compatible
- × incompatible
- no link
- ? uncertain / tenuous link

Note: SA objectives shown on x and y axis.

Naturally this exercise has identified some incompatibility between sustainability objectives. This is usually between the environmental and more economically driven objectives. For the purposes of SEA this does highlight some of the significant impacts of development on the environment, however, for the purposes of Sustainability Appraisal, it is important consider social and economic factors as well as environmental ones.

It is considered that the achievement of economic objectives is just as critical to achieving sustainable development as the conservation and protection of environmental assets and as such the economic objectives will remain in the Sustainability Appraisal Framework. There will however be important decisions which need to be taken by the LDF, informed by the findings of Sustainability Appraisal when in identifying economic priorities, particularly in respect of the more rural and sensitive parts of the Plan Area.

## **The detailed Sustainability Framework for the assessment of plans, policies and programmes and sites**

Having identified our Sustainability Objectives and the scoring mechanism, the next step is to consider the detailed approach we propose to take to assess policies and plans against them. We have decided to adopt a two-stage approach to detailed appraisal. Where we are considering the plan as a whole or policy directions and ultimately policies themselves we will use targeted questions under each objective and a draft matrix to undertake a detailed appraisal as shown on the following page. In the following section, assessment criteria are grouped under the LDF SA objective headings.

We have decided to simplify the SA assessment framework from the previous SA scoping report that was prepared in 2009. In order to do this, we have reduced the number of SA objectives all together. Also, in order to streamline and simplify the appraisal process and to avoid repetitive statements under each SA objective, the distinction between urban/rural areas of the Borough has been removed from the appraisal. This was considered appropriate as some of the sustainability objectives exert a rather limited or indirect relationship with urban/rural. The Sustainability Appraisal for the Site Allocations and Development Management Plan, however, will consider the impact of each policy on rural and urban areas of Taunton Deane and the relevant sustainability implications resulting from this will be summarised under each policy section.

Where we are considering site allocations we will adopt a criteria-based assessment. We have developed such assessments that will be applied to all sites as well as more specific assessments related to housing and employment allocations.

The advantage of setting out a more rigorous approach is that we can be more transparent, allowing statutory consultees, key stakeholders, developers, landowners and members of the public the opportunity to see a very detailed framework against which we will assess proposals.

## Matrix for detailed appraisal of policies and plans

In order to assess the sustainability of a plan, proposal or policy we need to establish an appropriate scoring mechanism against which we can measure performance. By applying a scoring weighting to the assessment it will be possible to provide a snapshot of the relative sustainability of a plan, proposal or policy and indeed compare them against one another.

It is proposed that for each objective we will judge impact against the following criteria:

(+5)	The proposal is likely to have a significant positive impact in contributing towards the achievement of the objective.
(+3)	The proposal is likely to have a positive impact in contributing towards the achievement of the objective.
(+1)	The proposal is likely to have some positive and some negative impact in terms of contributing towards the achievement of the objective, overall its impact is neutral.
0	The proposal is likely to have no impact positive or negative in contributing towards the achievement of the objective.
(-1)	The proposal could have a negative impact towards the achievement of the objective.
(-3)	The proposal is likely to have a negative impact in contributing towards the achievement of the objective.
(-5)	The proposal is likely to have a significant negative impact in contributing towards the achievement of the objective.

Sustainability Objective	Baseline info and indicators	Geographic Scale		Timescale		Cumulative impact	Commentary
		Borough	Outside Borough	Up to	Beyond		
<b>SA Objective 1: Climate Change</b>							
1. a) <i>“To consider the possible effects of climate change.”</i>							
1. b) <i>“ To promote the usage of renewable sources of energy. ”</i>							
1. c) <i>“To reduce the flood risk and the threat to people and property“.</i>							
<b>SA Objective 2: Town and Other Centres</b>							
2.. <i>“To strengthen and safeguard the vitality and viability of our town centres.”</i>							
<b>SA Objective: 3 Economy</b>							
3. <i>“To foster an entrepreneurial local economy with improved productivity, providing a strong employment offer.”</i>							
<b>SA Objective 4: Housing</b>							
4 a). <i>“To provide and maintain a sufficient supply of good quality mixed housing including an appropriate level of affordable housing to meet the needs of all section of the community and strategic housing requirements ‘.</i>							
4. b) <i>“To ensure sustainably balanced places are created or maintained providing access to an appropriate mix of services and facilities.”</i>							

Sustainability Objective	Baseline info and indicators	Geographic Scale		Timescale		Cumulative impact	Commentary
		Borough	Outside Borough	Up to	Beyond		
<b>5. SA Objective Inclusive Communities</b>							
<i>5.a) ' To reduce inequalities and promote the quality of life, health and well being for all residents of the Borough.'</i>							
<i>5. b) "To ensure cultural, leisure and recreational provision is readily accessible for all."</i>							
<b>6. SA Objective: Accessibility</b>							
<i>6. "To minimise the need to travel (particularly by car), and facilitate more sustainable forms of transport "</i>							
<b>7. SA Objective: Infrastructure</b>							
<i>7. "To ensure that development provides or contributes to the physical, green and social infrastructure that is necessary for the development to proceed and to mitigate the impact on existing communities and the environment "</i>							
<b>8. SA Objective: Environment</b>							
<i>8 .a) "To protect and conserve and enhance the Borough's natural habitats and biodiversity "</i>							
<i>8b). "To preserve and enhance the character and quality of the Borough's landscape"</i>							
<i>8c). "To preserve and enhance the Borough's built environment, heritage and archeology. "</i>							

Sustainability Objective	Baseline info and indicators	Geographic Scale		Timescale		Cumulative impact	Commentary
		Borough	Outside Borough	Up to	Beyond		
<b>9. SA Objective: Design</b>							
<b>9. "To encourage sustainable design and practice."</b>							

## Matrix for detailed appraisal of sites

In order to assess the sustainability of site allocations we need to establish an appropriate assessment mechanism against which we can measure performance. The SA framework for the Site Allocations and Development Management Policies Plan has been developed in a way that fully integrates it into the evaluation of sites. It will help determine whether sites should be allocated and, if so, for what use. The SA will be part of the process of assessing the sites in order of preference for allocation. The general SA framework for the whole LDF has been used as the starting point for devising the assessment criteria for sites.

The site assessment has been carried out in two stages. The first stage will assess the sites against a higher criteria that will identify features which should have more weight in decision making than others by identifying where the 'show stoppers' exists. The higher assessment criteria will be used to determinate those sites which should not be carried forward to the next stage of the site assessment and explain the reasons for their rejection. The criteria will be different depending on whether the site is being proposed for residential or employment use ('housing criteria' and 'employment criteria'). Sites that are being proposed for mixed use development need to be assessed against all two sets of criteria (i.e. housing and employment criteria).

### Higher Assessment Framework

A number of sites have been put forward for consideration as part of the Site Allocations DPD. The higher assessment framework will be used to assess all potential housing sites in Taunton and Wellington identified by the SHLAA against the criteria outline below which will ultimately result in a list of discounted sites.

### Higher Criteria

#### 1. The site falls inside the Taunton Town Centre Area.

**Justification:** The Site Allocations DPD will not allocate sites in Taunton Town Centre. Town centre sites that have been submitted to TDBC will be assessed and considered as part of the review of the Taunton Town Centre Area Action Plan.

#### 2. The site falls inside the existing settlement boundary.

**Justification:** There were some sites that have been promoted for development that fall within Taunton's existing settlement boundary. Many of these sites consist of proposals for urban intensification and regeneration or are located on existing urban open space.

It is considered that any development proposals that may come forward for these sites will be considered against the policies in the Development Management DPD and unless there are clear reasons to justify development related allocations within the Taunton urban area boundary (e.g. fragmented site ownership that may limit delivery of a comprehensive development scheme) TDBC are inclined not to set specific allocation boundaries within the settlement boundary.

#### 3. The site is smaller than 0.15ha or 5 dwellings.

**Justification:** Sites smaller than 0.15ha or 5 dwellings have been discounted to ensure the process of assessing sites is more manageable. Any future proposals for such sites will be considered against the policies in the Development Management DPD and do not require specific

allocation.

#### **4. The site already has a planning permission.**

**Justification:** There are a number of sites in TDBC that already have planning permission for development. They are not included in this Issues and Options consultation exercise because the Council has already reached a decision on them through the process of deciding to grant planning permission. However such sites will contribute to the eventual list of sites in the submission version of the DPD unless there is a significant change in circumstances since the granting of permission which may render the site unsuitable or unless the site has been completed.

#### **5. Compliance with Strategic Policy**

**Justification:** The Core Strategy sets the overall spatial strategy for Taunton Deane Borough. The Site Allocations Document must be consistent with the Core Strategy and will identify the sites to deliver the Core Strategy growth requirements. Sites have been assessed against the Spatial Policies of the Core Strategy and those which do not adjoin existing settlement limits will not generally be considered.

#### **6. Proximity to Hazardous Pipelines and Gas Compressor Stations.**

**Justification:** Sites within close proximity to hazardous pipelines and gas compressor stations have been discounted for health and safety reasons.

#### **7. Proximity to and impact on International and National Wildlife Sites.**

**Justification:** Sites that are within International and National Wildlife Sites have been discounted as such allocations would not comply with the Core Strategy policy CP8.

#### **8. Proximity to the Source Protection Zone 1 which would have to be served by a non-mains drainage system (in the absence of any mains connections).**

**Justification:** Sites that are within Source Protection Zone 1 which would have to be served by a non-mains drainage system (in the absence of any mains connections) have been discounted because of the potential adverse impacts on nearby drinking water supplies. In cases where there are no local mains connections available, then this could very possibly render a development unviable (both physically and financially).

#### **9. The site is wholly within Flood Zone 3b and incapable of being mitigated.**

**Justification:** The first consideration for sites at flood risk must always be avoidance by applying the Sequential Test. Sites that are wholly within Flood Zone 3b (and there is no robust evidence to successfully challenge this SFRA designation) have therefore been discounted from consideration in the SADMPP.

#### **10. The site cannot provide safe access onto the highway network for all modes of travel**

**Justification:** Sites that are not capable of providing safe access onto the highway network have been discounted. For example, if the approach roads are too narrow or otherwise unsuitable or the required visibility splays cannot be achieved it will not be possible to provide safe access to the site.

**11. Proximity to congested junctions where no mitigation is possible**

**Justification:** Sites likely to have adverse traffic impacts on congested junctions where no mitigation is possible have been discounted from consideration in the SADMPP.

**12. Compliance with Habitats Regulations 2010**

**Justification:** Sites that are unlikely to be acceptable in terms of the Habitats Regulations 2010 have been discounted from consideration in the SADMPP.

**Higher Assessment Framework – Gypsy and Traveller Sites only****1. Caravans and Mobile Homes for permanent all year round residential use located within Flood Zone 3a or 3B)**

**Justification:** In accordance with the guidance of the TGNPPF, ) Caravans and Mobile Homes for permanent/all year round residential use are not be permitted in Flood Zone 3a or 3b.

The assessment criteria outlined above will result in a final list of sites for the Issues and Options consultation. The inclusion of sites in the Issues and Options consultation does not represent a decision by the council. All sites that have been submitted through the SHLAA process and have progressed through the higher assessment criteria are included to allow the public to comment at this early stage of the process. All comments received will be considered before more detailed assessments are carried out to inform the preferred options consultation.

**Generic Assessment Framework**

Those sites that have been carried forward to the next SA assessment stage will be assessed against a range of generic criteria on a scale from strong to low impact, which as shown in the table below, correspond to whether or not development on a site is likely to conflict with a sustainability development objective. It is therefore possible to provide a snapshot of the relative sustainability of a site and indeed compare them against one another. We have not applied a scoring weighting to the assessment. Although the main difficulty with including unweighted scoring to sites is that it does not accurately identify issues which should have more weight in decision making than others or at least be weighted more strongly against it. With this in mind, the framework applied to assess the sites does allow a more comprehensive assessment in terms of giving environmental, social and economic considerations an equal weighting.

The Council considers that the methodology applied to the site assessment is sufficiently robust to ensure the identification of the most sustainable and appropriate sites.

The SA Site Selection Criteria was subject to public consultation along with the SADMPP between January and March 2013. As a result of some of the consultation responses to the SADMPP Issues and Options Consultation it was considered that the site selection criteria could benefit from being more detailed. The site assessment criteria have therefore been amended to give more detailed

consideration of sustainability issues. The overall sustainability of any site is now based on four guidelines of 'strong', 'medium', 'medium low' and 'low.'

Also, we have amended the accessibility criteria to take in consideration recommendations from the Sustainable Settlements: A Guide for Planners, Designers and Developers Document that was published in 1995. This document identifies a gradation of desirable distances from housing to services and facilities. The distance to services and facilities is based on (the shortest walking route as shown on the Google route planner). Please note that the walking routes may not include footpaths). The distances to services and facilities may differ depending on where the access to that site will be, however, as a general guide and to provide consistency in the way the assessment has been carried out, all distances have been measured from the centre of the site.

Table: Guidelines for assessment criteria

<b>Development may strongly conflict with objective</b>	<b>Strong impact</b>
<b>Development may conflict with objective</b>	<b>Medium impact</b>
<b>Development may partly conflict with objective or is likely to partly support the objective</b>	<b>Low/Medium impact</b>
<b>Development is unlikely to conflict with objective or/and is likely to support objective</b>	<b>Low or no impact/positive impact</b>

All of the sites are assessed against detailed environmental and housing criteria. After each site has been assessed against the appropriate criteria, a summary table needs to be filled out. The purpose of the initial site assessment is to give a snapshot of the likely sustainability of the site and to allow the sites to be compared against one another. The more sustainable sites for a location are those which have low impact against the criteria. The summary table highlights where development has a strong impact with an objective in which case there may be an opportunity to build mitigation into, for example, planning obligations or design and construction principles. A blank summary sheet is enclosed after the detailed criteria.

**Environmental Criteria**

**Landscape designations**

<b>Score</b>	<b>OBJECTIVE: To protect, enhance and improve local distinctiveness and landscape and townscape quality</b>
<b>1</b>	Site is within an area of national landscape importance
<b>2</b>	Site is within 2km of an area of national landscape importance (AONBs)
<b>3</b>	Site is within an area of local landscape importance
<b>4</b>	Site is not within an area of landscape importance

## Landscape impact

Score	OBJECTIVE: To protect, enhance and improve local distinctiveness and landscape and townscape quality
1	Major landscape issue but capable of mitigation
2	Moderate landscape impact capable of mitigation
3	Not used
4	No or insignificant landscape impact

## Nature Conservation Areas

Score	OBJECTIVE: To protect, enhance and improve biodiversity, flora and fauna and geological interest
1	<p>The site is within the influence of an area of international or national conservation interest (Special Areas of Conservation, Special Protection Areas, Ramsar, National Nature Reserves, Sites of Special Scientific Interest and some Local Wildlife Sites), or/and</p> <p>The site is a habitat listed under S.41 of the Natural Environment and Rural Communities Act 2006, i.e. of conservation importance in England; and /or</p> <p>The site affects the Favourable Conservation Status of a European protected species (listed on Schedule 2 of the Habitats Regulations 2010)</p>
2	<p>The site is within an area of local conservation interest (some Local Wildlife Sites, Local Nature Reserves, Local Geological Site)</p> <p>The site affects the Favourable Conservation Status of a Species listed on the Somerset Priority Species List (Somerset BAP)</p>
3	The site is partly or borders an area of local conservation interest (some Local Wildlife Sites, Local Nature Reserves, Local Geological Site)
4	The site is does not affect any of the above

## Sites of Historic Importance

Score	OBJECTIVE: To conserve and enhance the District's historic and cultural environment
1	Site is on or adjoining a Historic Park or Garden
2	Site is within a Conservation Area or affects the setting of a Listed Building
3	The site borders a Conservation Area
4	Site is not on or adjoining Historic Park or Garden. Also, it is not within or bordering a Conservation Area or affecting the setting of a Listed Building

## Sites of Archaeological Importance

Score	OBJECTIVE: To conserve and enhance the District's historic and cultural environment
1	Site is on or adjoining a scheduled ancient monument
2	Site is within an Area of High Archaeological Potential or County Archaeological site
3	Site borders an area of High Archaeological Potential or County Archaeological site

4	Site is not within or adjoining an area of High Archaeological Potential or County Archaeological site
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### Ground and surface water quality

Score	OBJECTIVE: To protect and improve ground and surface water quality
1	The proposal is likely to have a significant negative effect on ground or/and surface water quality
2	The proposal is likely to have a negative effect on ground and surface water quality
3	The proposal is likely to have limited effect on either ground or/and surface water quality
4	Site is not likely to have a negative effect on ground or/and surface water quality

### Air quality

Score	OBJECTIVE: To reduce air pollution
1	Site is within an Air Quality Management Area (AQMA)
2	Site is adjacent to an Air Quality Management Area (AQMA)
3	Commuter traffic from the site would need to pass through an Air Quality Management Area (AQMA)
4	Site is not within or adjacent to an Air Quality Management Area (AQMA) and commuter traffic would not need to pass through an Air Quality Management Area (AQMA)

### Existing un-neighbourly uses (e.g. sewage treatment works, scrap metal merchant, power lines) or adjacent noise or light pollution

Score	OBJECTIVE: To protect health and well-being
1	Site is affected by some un-neighbourly uses
2	Site is affected by noise or/and light pollution
3	Site is affected by minor noise or/and light pollution issue
4	Site is not affected by un-neighbourly uses or noise or light pollution issue

### Land contamination

Score	OBJECTIVE: To locate development close to essential services
1	The site is affected by a significant contamination or pollution issue
2	The site is affected by contamination or pollution issue
3	The site is affected by minor contamination or pollution issue
4	The site is not affected by a contamination or pollution issue

### Land of high agricultural value

Score	OBJECTIVE: To maintain and improve soil quality
1	Site is mainly Grade 1 agricultural land
2	Site is mainly Grade 2 agricultural land
3	Site is mainly Grade 3 agricultural land
4	Site is not best or more versatile agricultural land

## Floodplains

Score	OBJECTIVE: To ensure that development is not at risk of flooding
1	Site is wholly within Flood Zone 3
2	Site is partially within Flood Zone 3
3	Site is wholly or partially within Flood Zone 2
4	Site is within Flood Zone 1 or no risk of flooding

## Flood risk and mitigation

Score	OBJECTIVE: To ensure that development is not at risk of flooding and will not increase flooding elsewhere
1	Site is wholly or partially within floodplain Zone 3 and incapable of mitigation
2	Site is wholly or partially within floodplain Zone 2 and incapable of mitigation
3	Site is wholly or partially within floodplain Zone 2 or 3 but can be mitigated
4	Site is not affecting floodplain area

## Impacts on the Green Wedge

Score	OBJECTIVE: To maintain the separate identity of settlements
1	Site is wholly within the green wedge
2	Most of the site is within the green wedge
3	Only a small portion of the site is within a green wedge
4	Site is not within the green wedge

## Housing Criteria

### Proximity to employment opportunities

Score	OBJECTIVE: To provide a range of high quality employment opportunities
1	Site is at least 2km from employment opportunities
2	Site is at least 1km from employment opportunities.
3	Site is more than 800m from employment opportunities but employment opportunities could be provided within 800m of the site
4	The site is within 800 m employment opportunities

### Proximity to GP surgery

Score	OBJECTIVE: To locate development close to essential services
1	Site is over 2km of a GP surgery
2	Site is more than 1km but less than 2km of a GP surgery.
3	Site is within 800m - 1,000 m or less of a GP surgery
4	Site is within 800m of a GP surgery

### Capacity of Primary School

Score	OBJECTIVE: To locate development close to essential services
1	Settlement has no capacity to provide for additional primary school places in any schools within or near the settlement.
2	Settlement has very limited capacity to provide for additional primary school places in any schools within or near the settlement.
3	Settlement has limited capacity to provide for additional primary school places in any schools within or near the settlement
4	Settlement has got the capacity to provide for additional school places in primary schools within or near the settlement.

### Proximity to primary school

Score	OBJECTIVE: To locate development close to essential services
1	Site is over 800m of a Primary School
2	Site is within 600m but less than 800m of a Primary School
3	Site is more than 400m but within 600m of a Primary School
4	Site is within 400m of a Primary School

### Capacity of Secondary School

Score	OBJECTIVE: To locate development close to essential services
1	Settlement has no capacity to provide for additional secondary school places in any schools within or near the settlement.
2	Settlement has very limited capacity to provide for additional secondary school places in any schools within or near the settlement.
3	Settlement has limited capacity to provide for additional secondary school places in any schools within or near the settlement
4	Settlement has got the capacity to provide for additional school places in secondary schools within or near the settlement.

### Proximity to Secondary School

Score	OBJECTIVE: To locate development close to essential services
1	Site is over 2,000m of a Secondary School
2	Site is more than 1,500m but less than 2,000m of a Secondary School
3	Site is more than 1,000 but less than 1,500m of a Secondary School
4	Site is within 1,000m of a Secondary School

### Proximity to convenience shop

Score	OBJECTIVE: To locate development close to essential services
1	Site is over 800m of a convenience shop
2	Site is more than 600 but less than 800m of a convenience shop
3	Site is more than 400m but less than 600m of a convenience shop
4	Site is within 400m of a convenience shop

### Access to formal recreation facilities

Score	OBJECTIVE: To improve access to and retention of parks, open space and formal leisure and recreation facilities
1	Site is more than 2,00m from a public open space.
2	Site is more than 1,000m from a public open space.
3	Site more than 800m but less than 1,000m from a public open space.
4	Site is within 800m from a public open space.

### Opportunities for walking

Score	OBJECTIVE: To reduce the need for vehicular trips
1	There are very limited range and quality of walking networks including the Rights of Way network between housing, services and employment.
2	There are limited range and quality of walking networks including the Rights of Way network between housing, services and employment.
3	There are some good quality walking networks including the Rights of Way network between housing, services and employment.
4	There are range of good quality walking networks including the Rights of Way network between housing, services or employment.

### Opportunities for cycling

Score	OBJECTIVE: To reduce the need for vehicular trips
1	There are very limited range of good quality cycling networks between housing, services and employment.
2	There are limited range of good quality cycling networks between housing, services and employment.
3	There are some good quality cycling networks between housing, services and employment.
4	There are range of good quality cycling networks between housing, services and employment.

### Capacity of public transport to accommodate further growth

Score	OBJECTIVE: To locate development close to essential services
1	Settlement has a bus stop with a daily return service (less than twice hourly) and not including Saturday service.
2	Settlement has a bus stop with a daily return service (at least twice hourly) including Saturday service.
3	Settlement has a bus with a regular bus services (more than twice hourly) including Saturday services but not Sunday service.
4	Settlement has a train station and bus stop with regular services (more than twice hourly, including Saturday and Sunday services).

**Proximity to bus stop**

<b>Score</b>	<b>OBJECTIVE: To locate development close to essential services</b>
1	Site is more than 400m of a bus stop
2	Site is more than 300m but less than 400m of a bus stop
3	Site is more than 200m but less than 300m of a bus stop
4	Site is within 200m of a bus stop



**Taunton Deane Site Allocations  
and Development Management  
Plan Preferred Options –  
Sustainability Appraisal**

**October 2013**

## 1.0 Introduction

Stage C: Preparing the Sustainability Appraisal Report (this report represents stage C)

- 1.1 Each of the potential site allocations identified in the SADMP Issues and Options Consultation and any additional sites put forward through the consultation have now been subjected to a full 'Sustainability Appraisal' (SA). The first stage of the Sustainability Appraisal involved assessing all potential site allocations against the Higher Assessment Framework which has resulted in a list of excluded sites. This list is included at Appendix 1. The sites remaining have been assessed against a number of detailed criteria. This has allowed us to critically appraise the merits of potential site allocations. The SA is an objective assessment that helps to inform the identification of the Preferred Options but the SA will not necessarily dictate what the Preferred Options will be.
- 1.2 This Report summarises the results of the SA assessment of sites against the site selection criteria. In-light-of the sheer number of sites considered, the full SA comparison sheet (which is in excel format) and the more detailed site summary assessments are contained in Appendix 2.
- 1.3 The Council has already met the housing targets for Wellington and is not proposing to allocate any sites in Wellington as part of the SADMP. We have not, therefore, included a summary of Wellington sites within the SA.
- 1.4 A draft Sustainability Appraisal for those sites that fall within the urban extensions area of search (Staplegrave and Comeytrove/Trull) has been carried out separately by consultants Parsons Brinckerhoff. The findings of this assessment is set out in this document. A separate draft SA report has been prepared by Parsons Brinckerhoff and presents and assesses broad development options and directions of growth at Comeytrove/Trull and Staplegrave urban extension areas building upon information within the technical evidence base underpinning the Council's Core Strategy and earlier urban extensions studies. Four broad development options are presented for each area, and these have been assessed against the Core Strategy Sustainability Appraisal objectives and a preferred option is presented for each area. This presents the preferred direction of growth for the urban extensions. The actual extent of each area needs to be refined and informed through a combination of visual assessments and more detailed masterplanning.
- 1.5 The Sustainability Appraisal needs to compare alternative options and assess these against the baseline environmental, economic and social objectives. In order evaluate the sustainability effects of each of the development management policies and to facilitate meaningful comparison, we have identified a series of alternative development management policies which we have assessed against the SA objectives along with the preferred policy options. This assessment helps to outline the reasons the rejected options were not taken forward and the reasons for selecting the preferred option in the light of the alternatives. The full SA assessment of each of the development management policies can be found in the Appendix 3.

## **2.0 What happens next?**

Beyond this consultation on the SA (SADMP Preferred Options), we will refine and add more detail to proposals prior to release of the Published Plan. At the point at which the Published Plan is released, we will be in the position to undertake a more detailed assessment of the sustainability implications of the SADMP.

## **2. Assessment of potential development management options**

### *2.1 Climate Change:*

The early Issues and Options consultation undertaken by the Council as part of the SADMP's preparation included an option for the inclusion of an additional policy on renewable energy. This option has been fully tested against the Sustainability Appraisal however it does not perform differently to a 'do nothing' option where the Council would merely rely on its adopted policies as set out within the adopted Core Strategy.

In view of the lack of any tangible benefit identified with the inclusion of a policy, the Council is not minded to include a policy to address renewable energy.

### *2.2 Economy:*

#### Associated facilities within employment areas

#### **Option 1: Include a policy addressing associated facilities within employment areas**

**Option 2: Business as usual:** Retain employment areas for industrial/storage uses only, and rely on the existing development plan policy and the Framework to inform planning applications.

Option 1 would score strongly against a number of the SA objectives. By providing facilities within employment areas will help reduce the need to travel thus potentially making positive contribution against climate change and accessibility objectives it may also assist in reducing social inequality. The alternative option scores poorly against these objectives as this option would not enable people to link their place of work with some other activities without the need to travel. The alternative option would ensure that employment areas are retained solely for industrial/storage type use which is likely to help to retain their primary function and role. Option 1 could conceivably have a detrimental impact on employment areas if uses within them became fragmented as a consequence of the policy.

**Opportunities for mitigation:** The policy will need to specify detailed criteria regarding the size of estates and the range and size of services that would be acceptable in order to ensure that they do not become destinations on the own and without the risk of significant increase in 'out-of-centre proposals which can result in unsustainable travel patterns and impact on town centre vitality and viability.

**Preferred Option:** Option 1 is the strongest performing option and subject to the inclusion of appropriate safeguards as identified above should be included within the SADMP.

## Class C2 uses in employment areas

### **Option 1: Include a policy addressing class C2 uses in employment areas**

**Option 2: Business as usual:** no latitude would be made for Class C2 uses within employment areas, and the Council would need to rely on the existing development plan policy and the Framework to inform planning applications.

Option 1 scores strongly against the objective “To foster an entrepreneurial local economy with improved productivity, providing a strong employment offer. The preferred option also scores well against the housing objective and the objective to reduce inequalities and promote the health and well being of all residents since it would make specific recognition for a section of the population with specific housing needs. The alternative option scores poorly against these objectives due to the fact that much of the projected jobs growth is anticipated to be in non-B class uses, failure to provide some flexibility may threaten the delivery of certain sites and the jobs target set by the Core Strategy.

The alternative option scores better against climate change and accessibility objectives. This is because this option would not impose any pressure on 'out of centre' proposals, and increase unsustainable travel patterns. Residential amenity could also be compromised under Option 1.

**Opportunities for mitigation:** The policy will specify detailed criteria which would need to be met by any application for Class C2 Residential Institutional use within defined employment areas, including providing good accessibility by public transport modes and any amenity considerations of nearby residents which is likely to reduce any negative impacts against these objectives.

**Preferred Option:** Option 1 is the strongest performing option and subject to the inclusion of appropriate safeguards as identified above should be included within the SADMP.

## New employment allocation at Silk Mills, Taunton

### **Option 1: include new employment allocation at Silk Mills**

**No alternative options were identified since no other readily available sites were identified for employment within the Taunton Urban Area.**

Option 1 scores well against economic and housing objectives. This land is needed to assist the future economic growth of Taunton. Since much of the projected jobs growth is anticipated to be in Class B uses, failure to provide adequate provision of employment land in accessible locations may threaten the delivery of certain sites and the jobs target set by the Core Strategy. The option would assist in providing employment land in an accessible location which is likely to reduce the need to travel. Were the site not allocated, there is a potential for insufficient employment land to be identified. Any failure to provide sufficient supply of employment land would likely lead to an increase of out-commuting and increase the use of a private car and therefore have a detrimental effect on self-containment.

The Silk Mills employment allocation is within close proximity (walking distance) from the Taunton town centre and retaining this Class B allocation within the Plan is likely to complement rather than compete with the vitality and viability of the Taunton town centre.

**Opportunities for mitigation:** Since the site lies beyond existing settlement limits and up until now, the designated Green Wedge, any proposal will need to incorporate appropriate planting to mitigate the landscape and visual impact of developing this site.

**Preferred Option:** Including the site will provide an immediately deliverable opportunity to release new employment land in the Taunton Urban Area. Subject to the appropriate mitigation, the site should be included within the SADMP Preferred Options.

### New Strategic Employment Site

#### **Option 1: Land at Junction 25**

#### **Option 2: Do nothing**

#### **Option 3: Monkton Heathfield**

#### **Option 4: Comeytrowe**

A number of potential options were identified under this allocation, these included a 'do nothing' option. The SA recognised that the East of Junction 25 option will perform most strongly against economic objectives with good access to the strategic highway network. It would however potentially involve development of land in flood Zone 3 and there are limited opportunities to access the site on foot or by cycle.

The 'do nothing' option would do little to ensure adequate provision of employment land. Consequently it scores poorly against economic objectives, furthermore it may increase the need to travel since without planned employment opportunities coming forward residents may need to travel to other districts for work.

Options at Comeytrowe and Monkton would provide for accessible, balanced developments. However, neither option benefits from as good access to the strategic highway network. In the case of Comeytrowe, any development would likely have a strong negative impact against landscape considerations as it would need to occupy a prominent location, most likely beyond the Ridge off the A38.

**Opportunities for mitigation:** Noise and air quality impacts could be mitigated through sensitive siting of development and appropriate design. It is essential that any proposal is appropriately landscaped to provide a quality environment for business and as a gateway into the town. Flood Risk mitigation would need to be provided as part of the proposal. Highway capacity and traffic impacts are recognised as a major issue to overcome and the Borough Council and developers will work with the Highways Agency and the County Highways Authority to address this matter prior to the granting of any planning permission.

**Preferred Option:** There is very little between the potential options 1, 3 and 4 in terms of the results of the Sustainability Appraisal. However, it would appear that only Option 1 provides an available and thus potentially deliverable option for further consideration.

#### *2.4 Housing:*

The initial SADMP Issues and Options consultation identified a need to define specific policies to cover both exceptions sites and self-build proposals. Although the Council's decision on excluding such policies from the SADMP has not been made on purely sustainability grounds; the following information summarises the results of the initial SA assessment:

The results of the SA assessment shows that criteria based policies on self-build and exception sites score poorly against many of the SA objectives such as protecting the environmental quality of the Borough, to consider the possible effects of climate change and ensuring good accessibility to services and facilities for all residents of the Borough. This is because such approaches would encourage development in potentially unsustainable locations and therefore increase the need to travel by a private car. Such approaches would, however, score well against objectives on housing and inclusive communities as both policies would help to meet the affordable housing need of some rural communities.

The Core Strategy policies CP4 and DM1, Framework and other planning guidance provide detailed guidance that will allow self-build and exception type proposals to be assessed equally on a case by case basis. Furthermore, the exemption of self-build proposals from CIL in the future may well create assist in the delivery of such schemes. The Council is mindful of not including policies within the SADMP which are not necessary, and which could potentially encourage development in locations that are not otherwise considered sustainable.

#### Agricultural Worker Dwellings

##### **Option 1: include policy addressing Rural Workers Dwellings**

**Option 2 - Business as usual:** Do not have a policy Rural Worker Dwellings and rely on existing development plan policy and the Framework to inform planning applications.

Option 1 would score well against the following SA objectives: "to foster an entrepreneurial local economy with improved productivity, providing a strong employment offer and 'to reduce inequalities and 'to meet housing needs of all sections of the community'. The alternative option scores poorly against these objectives due to the fact that such an approach is likely to see most applications for rural worker dwellings refused or at least not see them come forward in locations where they may be most needed which would potentially fail to support the rural economy.

The preferred option is likely to have a slight negative impact on the objectives to provide access to an appropriate mix of services and facilities, to consider the possible effects of climate change and 'to protect the environmental quality of the Borough'. The preferred option is likely to increase the need to travel to a degree whilst the alternative option would help

to protect the countryside from intrusive development. The preferred option could, however, reduce daily commuting for some rural residents, enabling them to link their place of work with their housing needs.

**Opportunities for mitigation:** By adopting the former PPS7 Annex, the policy will ensure that rural workers dwellings only come forward when a clear case can be made to allow the proposal.

**Preferred Option:** Whilst the 'business as usual' approach may overall have less negative impacts than including a policy, the benefits of providing a policy which ensure necessary rural workers dwellings can be delivered in the right locations is considered to outweigh this.

## 2.5 *Inclusive Communities*

### Land for Educational Purposes

**Option 1: include a policy reserving land for educational purposes**

**Option 2 – do nothing:** Do not safeguard land for educational purposes.

Option 1 would reserve land for education purposes, this option scores strongly against a number of SA objectives, including: to consider the possible challenges of climate change, to reduce inequalities, promote accessibility to services and facilities, and to ensure that development provides appropriate infrastructure that is necessary for the development to process. The option would also also potentially support the delivery of key development sites and therefore, scores positively against housing and employment objectives.

The alternative option scores rather poorly against most of the SA objectives and receives a negative score overall. This option is likely to increase the need to travel and therefore CO2 emissions as such an approach may result in sites otherwise ideal for future school provision/expansion being lost to other uses, and provision would then need to be met on other sites/ in potentially less sustainable locations which may not be accessible to all residents.

**Opportunities for mitigation:** None identified.

**Preferred Option:** Providing a policy to safeguard land for educational uses scores significantly more favourably than the do nothing option.

### Protection of recreational open space

**Option 1: include policy to protect recreational open space**

**Option 2: do nothing**

Option 1 scores strongly against a number of SA objectives:

‘to reduce inequalities and promote the quality of life, health and well being for all residents of the Borough.’ “to ensure cultural, leisure and recreational provision is readily accessible for all and ‘to consider the possible challenges of climate change, “

It also scores very well across a range of objectives: Flood Risk (Objective 1c), Accessibility (Objective 6), Infrastructure (Objective 7), Biodiversity (Objective 8a), Landscape (Objective 8b), and Design (Objective 9)

Option 1 ensures that recreational open space is secured this will help to promote access to cultural, leisure and recreational provision and help to reduce inequalities and promote the quality of life, health and well being for all residents of the Borough. Green space supports local biodiversity and helps to mitigate against climate change. Locating green space in accessible locations is also likely to reduce the need to travel.

Option 2 would clearly have the inverse impacts. In particular it could result in the loss of valuable open space, this may increase the need to travel or worse result in health and recreational disbenefits with insufficient land set aside for such uses.

**Opportunities for mitigation:** None identified.

**Preferred Option:** Providing a policy to safeguard land for recreational uses scores significantly more favourably than the do nothing option.

#### Provision of recreational open space

**Option 1: include a policy to provide recreational open space**

**Option 2: do nothing**

Option 1 scores strongly with regard to: ‘to reduce inequalities and promote the quality of life, health and well being for all residents of the Borough.’ ‘to ensure cultural, leisure and recreational provision is readily accessible for all and ‘to consider the possible challenges of climate change, ‘

This option also scores very well across a range of objectives: Flood Risk (Objective 1c), Accessibility (Objective 6), Infrastructure (Objective 7), Biodiversity (Objective 8a), Landscape (Objective 8b), and Design (Objective 9) (Access to services and facilities (4b).

The option ensures recreation open space and sports facilities are secured on sustainable locations which will help to promote access to appropriate mix of services and facilities and in particular ensure that cultural, leisure and recreational provision is accessible for all. This option will also have a positive impact on reducing inequalities, the quality of life, health and well being for all residents of the Borough. Green space supports local biodiversity and locating green space in accessible locations is likely to reduce the need to travel.

The option receives a negative score against (objective 3) Employment and a (Objective 4a) Housing. The preferred option would ensure that as part of a masterplanning of larger sites, consideration is given to the potential need to meet recreational open space requirements on site and any implications for the design of the site. This would ensure that recreational land would not be lost for other uses unless appropriate mitigation is provided which could reduce the net developable area for housing or employment.

The alternative, do nothing option would not lead to a comprehensive approach to design and planning. This may, as with the previous policy increase the need to travel and/or result in insufficient land being identified to meet open space requirements.

**Opportunities for mitigation:** None identified.

**Preferred Option:** Providing a policy to secure the provision of land for (or contributions towards) recreational uses scores significantly more favourably than the do nothing option.

#### Horse riding establishments

**Option 1: include a policy to guide decision-making on applications for horse riding establishments**

**Option 2: do nothing**

Option 1 scores strongly with regards to ‘reduce inequalities and promote the quality of life, health and well being for all residents of the Borough.’, to ensure cultural, leisure and recreational provision is readily accessible for all, to foster an entrepreneurial local economy with improved productivity, providing a strong employment offer and “to encourage sustainable design and practice.”

The option also scores very well across a range of objectives: Climate Change (Objective 1a), Accessibility Objective 6), Biodiversity (Objective 8a), Landscape (Objective 8b), and Historic Environment (Objective 8c).

The option does not receive any negative scores against any of the objectives.

The preferred option ensures that leisure and cultural provision is accessible to rural settlements which will help to support the rural economy, and reduce inequalities and promote the quality of life, health and well being. The preferred option will include criteria on relationships to settlements, existing groups of buildings, bridleway network and access arrangement which is likely to protect both natural and man made environment as well as ensure that design and accessibility considerations are not compromised by any proposal.

The alternative, do nothing option would not provide a specific development management policy to guide decisions on proposals for horse riding facilities. The biggest disadvantage of the alternative option would be that it would potentially lead to applications for such uses refused, as they would need to be judged against other development plan policies. This may threaten the economy in rural areas as well as lead to recreational opportunities not being provided.

**Opportunities for mitigation:** None identified.

**Preferred Option:** Providing a policy to guide proposals scores well against the Sustainability Appraisal objectives.

#### Urban Open Space

## **Option 1: include a policy to protect Urban Open Space**

### **Option 2: do nothing**

Option 1 scores strongly with regard to the following objectives: ‘to reduce inequalities and promote the quality of life, health and well being for all residents of the Borough.’ ‘to ensure cultural, leisure and recreational provision is readily accessible for all, and to consider the possible challenges of climate change

The option also scores very well across a range of objectives: Flood Risk (Objective 1c), Accessibility (Objective 6) Infrastructure (Objective 7), Biodiversity (Objective 8a), Landscape (Objective 8b), and Design (Objective 9)

Option 1 ensures urban open space is secured on sustainable locations which will ensure that cultural, leisure and recreational provision is accessible for all. This option will also have a positive impact on reducing inequalities, the quality of life, health and well being for all residents of the Borough. Green space supports local biodiversity and locating green space in accessible locations is likely to reduce the need to travel as well as have a positive impact on design and landscape objectives.

The option receives a negative score against (objective 3) Employment and a (Objective 4a) Housing. The preferred option would ensure that green space would not be lost for other uses unless appropriate mitigation is provided which could reduce the net developable area for housing or/and employment.

The do nothing option could lead to important areas of open space being lost. Since these open areas are within settlement limits, this option would thus score well against housing and economic objectives. It would however fail to protect these open areas and this would have a strong negative impact against landscape and health and recreation objectives.

**Opportunities for mitigation:** None identified.

**Preferred Option:** Providing a policy to protect these areas scores well against the Sustainability Appraisal objectives. Therefore despite there being some benefits in the do nothing option, the inclusion of a policy is considered justified.

### Protection of community facilities

## **Option 1: include a policy protecting community facilities**

### **Option 2: do nothing**

Option 1 scores strongly with regard to the following objectives:

“To minimise the need to travel (particularly by car), ‘to consider the possible challenges of climate change’ ‘to provide access to an appropriate mix of services and facilities’, to reduce inequalities and ‘to ensure that development provides or contributes to the physical, green and social infrastructure that is necessary for the development to proceed.

The option would ensure that community facilities are secured on sustainable locations which would enhance access to services and facilities whilst reducing the need to travel. This option would also support the delivery of key development sites, and have a positive impact on housing and employment objectives.

Although appropriate community uses would need to comply with the Core Strategy and Government principles of 'town centre first' approach, by protecting community facilities such as food shops within the centres of sustainable settlements could have a negative impact town centres vitality and viability.

The alternative option would not offer protection to community facilities. This may mean that important services and facilities are lost. In rural areas in particular this is likely to increase the need to travel, it also would have a strong negative impact against social objectives.

**Opportunities for mitigation:** None identified.

**Preferred Option:** Providing a policy to protect these areas scores well against the Sustainability Appraisal objectives.

#### Provision of fully accessible toilet and changing room facilities within the public realm

**Option 1: include a policy to ensure the provision of accessible facilities**

**Option 2: do nothing**

Option 1 scores well against the following objectives 'to reduce inequalities and promote the quality of life, health and well being for all residents of the Borough, 'to ensure sustainably balanced places are created or maintained providing access to an appropriate mix of services and facilities, and to minimise the need to travel.

The alternative option would fail to promote equal access to facilities within the public realm which is likely to make some areas inaccessible for a portion of the population or/and increase the need to travel in order to use alternative facilities.

**Opportunities for mitigation:** None identified.

**Preferred Option:** Providing a policy to protect these areas scores well against the Sustainability Appraisal objectives.

#### DM5: Golf

The option to include this policy within the SADMP scores neutral against all of the SA objectives due to the fact that the items that this policy covers are already adequately covered by the Core Strategy Policies CP8 – Environment, DM1 – sustainable development, CP1 – Climate Change and the Development Management Process. The Council is mindful of including policies within the SADMP which are not necessary.

## Health Care and Specialist Accommodation

The consultation responses to the SADMP Issues and Options consultation expressed that the SADMP should set out generic criteria to guide the location of health care and specialist accommodation. This option scores neutral against all of the SA objectives due to the fact that in main this matter is already covered by the Core Strategy Policies SP1, SP2, SP3, CP3, DM1 and DM2. The Council is mindful of including policies within the SADMP which are not necessary.

Comments were also received about healthcare being a specialist economic development and needing policy support. The council has assessed this option as part of the Economy section of the SA which would permit Residential Institutions within defined employment areas. Please see Economy section.

### **3. Assessment of potential site allocations**

This chapter sets out a summary of the Sustainability Appraisal of each site considered. Tables are included for each settlement where the SADMP will include future site allocations.

It should be noted that sites at Wellington have not been considered in detail through the SA process. This is because the Council's latest housing trajectory indicates that sufficient sites have already been identified to meet the Core Strategy requirements. Were further sites identified through the SADMP, this would likely be at odds with the spatial strategy and distribution set out under Core Strategy policy SP1 (appraised under the Core Strategy SA).

**Settlement (and sites assessed): Staplegrove**

12. Land at Pinkhurst of Gypsy Lane/Corkscrew Lane  
 13. Land adjoining Gypsy Lane

14. Taunton School playing fields  
 ADD3 Land to the rear of Kingston Road  
 ADD19 Land at St Augustine's School

**Summary of Assessment against Environmental Criteria:**

None of the sites would impact upon international or national conservation sites or protected species. Site ADD3 is likely to affect the favourable Conservation Status of a species listed in the Somerset BAP.

None of the sites are within close proximity to national landscape designations or would affect local designations. All of the sites with the exception of site ADD19 would have a strong landscape impact. The site ADD19 would have a medium landscape impact.

All of the sites perform well against objectives on historic and archaeological importance, air quality, impact on existing un-neighbourly uses and water quality.

Most of the sites perform well against the objective to maintain and improve soil quality. Sites 14, ADD3 and ADD19 are not best or most versatile agricultural land. Sites 12 and 13 are mainly Grade 3 agricultural land.

All of the sites with the exception of site ADD3 perform well against flood risk objectives. The site ADD3 lies partially within Flood Zone 3.

Sites 12 and 13 lie wholly within the Green Wedge and development here would therefore have a strong negative impact against this objective. The site 14 lies partially within the Green Wedge and has a low/medium impact against this objective.

**Opportunities for mitigation:**

Despite of the high landscape impact, it is considered that there may be some scope for some development on site ADD19 subject to the form and layout of the buildings.

**Summary of Assessment against Residential Criteria:**

All of the sites with the exception of site ADD3 score well against access to employment objectives. All of the other sites are within 800m from employment opportunities.

All of the sites with the exception of sites ADD19 and ADD3 score poorly against access to a convenience shop. The site ADD19 scores particularly well against this objective as the site is within 400m from a convenience shop. Site 12 has a strong impact against proximity to a GP surgery whereas the other sites have a medium impact against this objective.

All sites with the exception of sites ADD3 and ADD19 score poorly against proximity to a Primary School. Site ADD19 has a low/medium and site ADD19 has a medium impact against this objective. All sites would have a strong negative impact on the capacity of the nearest primary school but all sites score positively against secondary school capacity.

Sites 13 and 14 score poorly against access to a Secondary School. Sites 12, ADD3 and ADD19 have a medium impact against this objective.

Site 13 performs poorly against access to a bus stop whereas all the other sites perform relatively well against this objective.

All sites score positively against access to recreational areas as all sites are within 800m from a public open space. Similarly, all sites score relatively well against opportunities for cycling.

**Suggested Preferred Option(s):**

The site ADD3 has been identified as the Council's preferred option. The site is within the existing settlement limit, and as there is therefore a general assumption that development on this site is acceptable in principle. The site scores well against some of the accessibility criteria such as access to a bus stop and a convenience shop. The site scores fairly well against some of the environmental criteria. The Green Wedge assessment has recommended that sites 12, 13 and 14 should be retained in the Green Wedge. Site ADD19 scores the best in terms of sustainability assessment but given the established educational use of this site and the identified shortage of school places, it is considered appropriate to reserve this site for educational purposes.

<b>Settlement (and sites assessed): Comeytrowe/Trull</b>	
31 Land at Broadlands, Comeytrowe/Trull	<p>ADD1 The former abattoir site: falls within the Comeytrowe urban extension Area of Search</p> <p>ADD2 Land south of Queens College (playing fields), Comeytrowe, Trull</p>
<b>Summary of Assessment against Environmental Criteria:</b>	
<p>Sites ADD1 and 31 have a potential to impact upon international or national conservation sites or protected species. Site ADD2 has a low impact on nature conservation although it is possible that an isolated colony of dormice exist in the hedgerows but this would need to be confirmed by survey. If present the site may not be developable due to the isolation and amount of habitat required to support a population.</p> <p>None of the sites are within close proximity to national landscape designations or would affect local designations. All of the sites in Comeytrowe/Trull have a strong landscape impact.</p> <p>All of the sites perform relatively well against historic and archaeological importance although the south western corner of the site ADD2 borders a Conservation Area.</p> <p>All of the sites perform well against air quality, water quality, un-neighbourly uses and impact on green wedges. All of the sites with the exception of site ADD2 are mainly Grade 3 agricultural land and therefore perform well against the objective to maintain soil quality. The site ADD2 is mainly Grade 2 agricultural land.</p> <p>All of the sites with the exception of site ADD1 perform well against flood risk objectives. The site ADD1 lies partially within Flood Zone 3.</p> <p>Opportunities for mitigation: There is a scope for developing the site ADD1 but lying within the proposed green wedge any development has to be sensitively landscaped.</p>	
<b>Summary of Assessment against Residential Criteria:</b>	
<p>The site 31 performs poorly against access to employment opportunities. All of the other sites have a medium impact against this objective.</p> <p>All of the sites perform poorly against access to Primary and Secondary schools. All of the sites with the exception of site ADD2 perform poorly against proximity to a convenience shop. The site ADD2 has a medium/low impact against this objective. The sites ADD1 and 31 perform poorly against proximity to a GP surgery. The site ADD2 performs well against this objective.</p> <p>All of the sites score negatively against primary and secondary school capacity.</p> <p>All of the sites with the exception of site ADD1 are within 800m from a public open space. The sites ADD1 and ADD2 perform relatively well in terms of opportunities for cycling. There are existing cycling trails in the centre of Taunton and there are proposed cycling links from the sites to some employment and services. The urban extension in Comeytrowe may provide additional cycling links.</p> <p>The site 31 has a medium impact on the capacity of public transport to accommodate further growth. All of the other sites have a low/medium impact against this objective.</p> <p>The sites ADD2 and 31 are within 300m from a bus stop and therefore perform relatively well against this objective whereas the site ADD1 has a strong negative impact against this objective.</p>	
<b>Suggested Preferred Option(s):</b>	
<p>The site ADD1 is the Council's preferred option. This site has been identified as the Preferred Option area for the Comeytrowe urban extension. Further information explaining the sustainability considerations is outlined in the Strategic Urban Extensions report.</p> <p>The site 31 scores particularly poorly against the accessibility criteria. Out of the three sites, the site ADD2 scores the best in terms of accessibility to services and facilities criteria. However, the site is currently designated as Urban Open Space and is very prominent in the landscape.</p>	

<b>Settlement (and sites assessed): North Taunton</b>	
17). Land east and west of Mills Farm 18) North west of Cross Keys 19) South of Courtlands Farm, Norton Fitzwarren	20). West of Rectory Road, Norton Fitzwarren 21) Land south of B3277, Norton Fitzwarren
<b>Summary of Assessment against Environmental Criteria:</b>	
<p>None of the potential site allocations in North Taunton are within a close proximity to a national landscape designation or would affect a local landscape designation.</p> <p>Sites 17 and 20 have a potential to impact on international or national conservation sites or international or/and European protected species/habitats. The site 21 is likely to affect the Favourable Conservation Status of a Species listed under the Somerset Priority Species List (Somerset BAP). Sites 18 and 19 have a low impact on nature conservation although some common pipistrelle and brown long-eared bat activity have been recorded on these sites but no major roost identified.</p> <p>All of the sites except the site 21 have a strong landscape impact. The site 21 has a medium landscape impact. All of the sites perform well against objective to conserve and enhance the District's historic and cultural heritage. The sites 17, 18, 19 and 20 have a medium impact on sites of archaeological importance.</p> <p>All of the sites perform well against air quality, water quality and impact on green wedges. All of the sites perform relatively well against the objective to maintain soil quality. The sites 17 and 21 are mainly Grade 3 agricultural land whereas the sites 18 and 19 contain mainly poor quality agricultural land.</p> <p>All of the sites except the site 21 perform well on the impact on existing un-neighbourly uses. The site 21 has a medium impact against this objective.</p> <p>The sites 18 and 19 perform well against objectives on flood risk whereas the site 21 has a strong negative impact against this objective. The site 17 has a medium impact against this objective.</p> <p>Opportunities for mitigation:</p>	
<b>Summary of Assessment against Residential Criteria:</b>	
<p>The sites 20 and 21 perform poorly against access to employment opportunities. The sites 17, 18 and 19 have a medium impact against this objective.</p> <p>All of the sites with the exception of site 21 perform poorly against the proximity to a GP surgery and a convenience shop. The site 21 performs particularly well against these objectives as the site is within 800m from a GP surgery and within 400m from a convenience shop. All of the sites except site 18 have a strong negative impact in terms of proximity to a Primary School. The site 18 is within 600m from a Primary School. All of the sites in North Taunton perform poorly against access to Secondary Schools. None of the Primary or Secondary Schools near the sites have capacity to provide additional school places.</p> <p>All of the sites perform relatively well against access to formal recreational opportunities. The sites 17, 20 and 21 are within 800m from a public open space designation whereas the sites 18 and 19 are within 1km from such designations. All of the sites perform well against opportunities for cycling. There are existing cycling trails between housing, employment and services. There are also some new proposed cycling routes within close proximity of the sites.</p> <p>The site 21 is within 200m from a bus stop and therefore performs well against this objective. The site 18 is within 300m from a bus stop and also performs relatively well against this objective. The sites 17 and 19 have a strong negative impact against this objective whereas the site 20 has a medium impact against this objective.</p>	
<b>Suggested Preferred Option(s):</b>	
<p>The site 21 is the Council's Preferred site. Whilst the site currently lies within Flood Plain, its identification for development would see the completion of a flood scheme, channel work improvements and ground –raising. It would also secure the completion of the Norton Bypass which would reduce traffic through the heart of the Village. Out of the 4 sites in North Taunton, the site 21 is the best site in terms of access to services and facilities criteria followed by site 18.</p> <p>The sites 19 and 20 score the lowest in terms of access to services and facilities criteria. All of the sites perform poorly against landscape impact but the sites 18 and 19 perform the best in terms of the environmental criteria and have the lowest impact on nature conservation. A significant part of site 17 is affected by a Flood Plain. The site 17 also performs poorly against access to services and facilities criteria.</p>	

**Settlement (and sites assessed): South Taunton**

24) Land at Longrun Farm / SCAT, Bishops Hull, South Taunton  
 25) Land at Netherclay / Silk Mills Road, Bishops Hull, South Taunton

26) Parsonage Farm, Bishops Hull, South Taunton  
 27) Land at Bishops Hull / Stonegallows, South Taunton  
 33) Land at Wild Oak Lane, Trull, South Taunton  
 34) Land off Trull Road, South Taunton  
 35) Land at Queens Drive, Sherford, South Taunton

**Summary of Assessment against Environmental Criteria:**

None of the potential site allocations in South Taunton are within a close proximity to a national landscape designation or would affect a local landscape designation.

Sites 25, 33 and 35 have a potential to impact on international or national conservation sites or international or/and European protected species/habitats. The site 27 is likely to affect the Favourable Conservation Status of a Species listed under the Somerset Priority Species List (Somerset BAP). Sites 24, 26 and 34 have a low impact on nature conservation.

The sites 25, 26, and 34 have a strong landscape impact whereas sites 24, 27, 33 and 35 have a medium landscape impact. All of the sites perform well against objective to conserve and enhance the District's historic and cultural heritage. The site 25 borders a Conservation Area. All of the sites perform relatively well against protecting areas of archaeological importance although the sites 25 and 26 both border an area of High Archaeological Potential.

All of the sites perform well against impact on existing un-neighbourly uses and air and water quality. All of the sites except the sites 33 and 35 perform relatively well against the objective to maintain soil quality. The site 34 is not best or most versatile agricultural land and sites 24, 25, 26 and 27 are mainly Grade 3 agricultural land.

All of the sites except the site 24 perform well against the flood risk objectives. The site 24 lies partially within a Flood Zone 3 and therefore has a medium impact against this objective. All of the sites except the site 27 lie wholly within a Green Wedge and therefore have a strong negative impact against this objective.

**Summary of Assessment against Residential Criteria:**

All of the sites with the exception of sites 24 and 27 perform poorly against proximity to employment opportunities. All of the sites except the site 24 perform poorly against proximity to a GP surgery. The site 24 has a medium/low impact against this objective.

None of the Primary or Secondary Schools near the sites have capacity to provide additional school places. The sites 25, 26 and 33 are within relatively close proximity to a Primary School. The sites 27, 34 and 35 perform particularly poorly against this objective. The site 24 has a medium impact against this objective. The sites 24, 25 and 26 are within close proximity to a Secondary School whereas the sites 33, 34, and 35 perform poorly against this objective.

All of the sites with the exception of the site 27 perform poorly against proximity to a convenience shop. The site 27 has a medium/low impact against this objective as it is within 600m from a convenience shop.

All of the sites are within 800m from a public open space, and therefore perform well against the objective to locate development close to recreational areas. The sites 25, 26, 27 and 33 are within close proximity to a bus stop whereas the sites 24, 33 and 35 perform poorly against this objective.

All of the sites perform well against opportunities for walking and cycling. There are existing cycling trails and routes from the site to employment and services. There are also some new proposed cycling routes. There are dedicated footpaths from the site to services and employment.

**Suggested Preferred Option(s):**

The sites 24 and 27 have been identified as the Council's Preferred Options. These options score fairly well against some of the accessibility criteria compared to the other sites. The site 27 would have the least landscape impact and has no access issues. The Green Wedge Assessment has recommended that the southern part of the site 24 to be removed from the Green Wedge. Given the current location in relation to the Caste School, it is considered appropriate to reserve this site for educational purposes.

The sites 33, 34 and 35 score the lowest in terms of accessibility to services and facilities criteria and have poor access arrangements. The Green Wedge Assessment has recommended retaining the sites 25, 26, 33, 34 and part of site 24 within the Green Wedge. The site 35 would have a significant impact on nature conservation and the access arrangements for this site are unclear possibly rendering the site undeliverable.

<b>Settlement (and sites assessed):</b>	
22) Land at Hyde Lane, Bathpool	
<b>Summary of Assessment against Environmental Criteria:</b>	
<p>The site 22 is not within a close proximity to a national landscape designation or would affect a local landscape designation.</p> <p>The Site 22 would not have a potential to impact on international or national conservation sites or international or/and European protected species/habitats but the site is likely to affect the Favourable Conservation Status of a Species listed under the Somerset Priority Species List (Somerset BAP).</p> <p>The site 22 has a strong landscape impact but the site performs well against objective to conserve and enhance the District's historic and cultural heritage. The site 22 borders a County Archaeological site, and therefore has a medium impact against the objective to conserve archaeological importance.</p> <p>The site performs well against objectives on air and water quality. The site is Grade 3 agricultural land and therefore performs relatively well against the objective to maintain soil quality.</p> <p>The site is on a green wedge and therefore has a negative impact against this objective.</p> <p>The site has a medium/low impact against the flood risk objectives as the site lies wholly within a Flood Zone 2.</p> <p>Opportunities for mitigation:</p>	
<b>Summary of Assessment against Residential Criteria:</b>	
<p>The site 22 is at least 1km from employment opportunities and therefore has a medium impact against this objective. The site performs quite poorly against the other accessibility criteria such as proximity to a GP surgery, Primary School and a convenience shop.</p> <p>The site performs relatively well against access to a Secondary School as the site is less than 1,500 from a Secondary School. The Primary or Secondary Schools near the site do not have the capacity to provide additional school places. The site performs relatively poorly against access to formal recreational areas and proximity to a bus stop.</p> <p>The site performs well against opportunities for cycling as there is an existing cycling trail from the site to employment and services</p>	
<b>Suggested Preferred Option(s):</b>	
<p>The site has not been identified as a Preferred Option. The site performs poorly against the environmental and access to services and facilities criteria. The site lies within the Bathpool Green Wedge and the Green Wedge Assessment recommends retaining the Green Wedge in this area. Development of this site would have a significant landscape impact. The site has a medium impact against nature conservation and flood risk.</p>	

**Settlement (and sites assessed): Wiveliscombe**

1. North of Plain Pond
2. Land off North Road
3. Greenway Farm
4. Burges Lane
5. Land at Norderns

6. Land at Ashbeers
7. Land south of Jews Lane
8. South of Croft Way
9. Land off Hartswell

**Summary of Assessment against Environmental Criteria:**

None of the sites would impact upon international or national conservation sites or protected species. Sites 1, 2, 4 and 7 are likely to affect the favourable Conservation Status of a species listed in the Somerset BAP.

None of the sites are within close proximity to national landscape designations or would affect local designations. Most sites would have a strong landscape impact although sites 6 and 7 would have a medium impact.

Sites 7 and 8 perform poorly against the historic and cultural environment objective. Sites 6 and 7 lie partially within an Area of High Archaeological Potential /County Archaeological Sites and have a medium impact against the objective.

All of the sites with the exception of site 6 perform well against the objective to maintain and improve soil quality. Site 7 lies partially within a Ground Water Protection Zone and has a medium impact against this objective.

**Opportunities for mitigation:**

It is considered that sites 6 and 7 can have landscape impact effectively mitigated.

**Summary of Assessment against Residential Criteria:**

All sites would have a medium impact on capacity of the nearest primary school and score negatively against secondary school capacity. Similarly opportunities for cycling are limited and consequently all sites score negatively against this objective.

Sites 6 and 8 are the only options within 800m of Class B employment opportunities whilst the remaining sites score poorly against this objective. All sites with the exception of 5, 6 and 9 are within close proximity of a GP surgery and sites 1, 2, 3 and 7 are also in close proximity to the nearest primary school. Sites 1, 2, 5 and 6 are more than 800m from the nearest convenience store and score negatively against this criteria. Sites 1, 2, 4, 5 and 9 would have a medium impact against the proximity to formal recreational areas objective, sites 6 and 7 score strongly positively against this consideration.

Sites 1, 2, 4, 5 and 9 are more than 400m from the closest bus stop and have a strong negative score whilst 2, 6 and 7 are more than 300m and have a medium impact against the objective.

**Suggested Preferred Option(s):**

Land at Croft Way lies in a reasonably accessible location. It is in close proximity to the Secondary School, Recreational Open Space, the new Dr's Surgery and is reasonably close to the centre of the Town.

**Settlement (and sites assessed): Bishops Lydeard**

- |                            |                                      |
|----------------------------|--------------------------------------|
| 1. Land off High Street    | 6. The Paddock                       |
| 2. Delta Rise              | 7. Taunton Road                      |
| 3. The Barton              | 8. Land off Hithermead               |
| 4. Lime Tree Farm          | 9. Land West of EC22                 |
| 5. East of Bishops Lydeard | 10. Saved Local Plan allocation EC22 |

**Summary of Assessment against Environmental Criteria:**

Sites 5 and 8 have potential to impact on international or national conservation sites or protected species. Sites 1, and 3 are likely to affect the favourable Conservation Status of a species listed in the Somerset BAP.

Sites 1, 2, 3 and 4 are within close proximity to the AONB. Sites 1, 3, 4 and 9 would have a strong landscape impact.

Sites 6 and 7 would have a moderate impact. sites 1, 2, 4 5, 7 and 8 have a strong negative impact against this objective due to the fact that the site 1 contains a historic park of a garden, the north western corner of the site 4 adjoins a historic park or garden, the site 4 adjoins a Historic Park or Garden, the southern corner of the site 5 is within a historic Park or Garden, the southern boundary of site 7 borders a historic Park or Garden and the site 8 contains one historic Park or Garden and the eastern part of the site borders a historic Park or Garden.

Site 3 lies partially within the Conservation Area and partially within an area of High Archaeological Potential.

Sites 3, 4 and 5 either lie wholly or partially within Flood Zone 3.

**Summary of Assessment against Residential Criteria:**

Sites 4, 6, 7 and ADD9 and ADD10 perform well against the employment objectives, these sites are within 800m from Class B employment opportunities. All of the other sites in Bishops Lydeard perform poorly against access to employment opportunities. All of the sites except the land to the west of existing Local Plan allocation EC22 are within 400m of a GP surgery, and therefore perform well against this objective.

Sites 1, 2, 3 and 5 are within 400m of the Primary School, and perform well against the objective to locate development close to essential services. Sites 7, 8, ADD9 and ADD10 are the furthest from a Primary School and perform particularly poorly against this objective.

All of the sites except the land to the west of existing Local Plan allocation EC22 (ADD9) perform are within relatively close proximity to a food shop. 1, 2 and 3 are within 400m from a convenience shop and therefore perform particularly well against this objective. All of the sites except the land to the west of existing Local Plan allocation EC22 (ADD9) and saved Local Plan allocation EC22 are within 800m from an urban or rural open space.

All sites perform relatively well against access to a bus stop with sites 2, 4, 6, 7 and ADD9 being within 200m from a bus stop and the rest of the sites being within 300m from a bus stop. Bishops Lydeard has a train station and bus stop with regular services (more than twice hourly, including Saturday and Sunday services).

All sites have a strong negative impact on capacity of the nearest primary school and score negatively against secondary school capacity. Similarly opportunities for cycling are limited and consequently all sites score negatively against this objective.

**Suggested Preferred Option(s):**

Land at Taunton Road and Hithermead are not as accessible as some of the other options. However, these sites have a lesser landscape impact than other options considered. They will also not impact to the same extent on localised congestion and parking issues (which are not part of the SA site selection criteria).

<b>Settlement (and sites assessed): Cotford St. Luke</b>	
<ol style="list-style-type: none"> <li>1. Land north and north west of Cotford</li> <li>2. Land at Highlands</li> <li>3. Land east of West Villas</li> </ol>	
<b>Summary of Assessment against Environmental Criteria:</b>	
<p>None of the sites would impact on international or national conservation sites or international or/and European protected species/habitats, or affect the Favourable Conservation Status of a Species listed under the Somerset Priority Species List (Somerset BAP). None of the sites in Cotford St Luke are wholly or partially within an area of local conservation interest. All of the sites are likely to contain some pipistrelle bat activity but no major roost identified.</p> <p>Site 1 has a strong landscape impact and performs poorly against the criteria on historic environment. It has a medium impact on sites of archaeological importance. The sites 2 and 3 have a medium landscape impact and perform well against the objectives on historic environment and sites of archaeological importance.</p> <p>None of the potential site allocations in Cotford St Luke are within a close proximity to a national landscape designation or would affect a local landscape designation.</p> <p>Site 1 has a medium impact on maintaining soil quality. Sites 2 and 3 perform relatively well against this criteria as they are mainly Grade 3 agricultural land. The site 1 has a medium impact on flood risk whereas sites the 2 and 3 perform well against this objective as they do not lie within areas of flood risk</p>	
<b>Summary of Assessment against Residential Criteria:</b>	
<p>The 3 options perform relatively well against proximity to employment opportunities. Although none of the sites are currently within 800m from Class B employment opportunities, if any of the sites were to be allocated they could include employment provision as part of an allocation. All of the sites in Cotford St Luke perform poorly against access to GP surgeries and all three sites perform quite poorly against access to a Primary School. The Primary School in Cotford St Luke has some capacity to provide additional primary school places.</p> <p>All of the sites perform poorly against access to secondary schools and none of the secondary schools have existing capacity to provide additional school places. Sites 1 and 2 perform relatively well against access to a convenience shop whereas site number 3 has a medium impact against this objective. All of the sites perform well against access to recreational areas as all of the sites are within 800m from an open space designation. All of the sites perform poorly against opportunities for cycling but perform relatively well against opportunities for walking as there are some good quality walking networks including the Rights of Way network between housing and services. Sites 1 and 3 perform poorly against access to a bus stop whereas the site 2 performs relatively well against this objective. All of the sites perform relatively well against public transport provision.</p>	
<b>Suggested Preferred Option(s):</b>	
<p>Each of the Cotford options perform relatively similarly. Sites 2 and 3 would not have such a significant impact on historic importance and archaeology, further, by identifying a combination of the two sites, landscape impact can be minimised.</p>	

**Settlement (and sites assessed): Creech St. Michael**

- |                                   |   |
|-----------------------------------|---|
| 1. Land at North End              | 5. Hyde Lane (pp / res to grant)          |
| 2. Land at Worthy Lane            | 6. North of School (pp / res to grant)    |
| 3. Land at Glenthorne             | 7. Land off Hyde Lane (pp / res to grant) |
| 4. Land east of Recreation Ground | 8. Mill Lane                              |

**Summary of Assessment against Environmental Criteria:**

Sites 3, 4, 5 and 8 have a potential to impact on international or national conservation sites or international or/and European protected species/habitats. Sites 1, 2 and 6 perform well against the objective on nature conservation. Site 7 has a medium/low impact against this objective as the site partly or borders an area of local conservation interest.

None of the potential site allocations are within a close proximity to a national landscape designation or would affect a local landscape designation. Site 1 is the best site in terms of landscape impact whereas sites 2, 3 and 5 would have a strong landscape impact. Site 8 would have a medium landscape impact. All of the potential site allocations except the site 6 perform well against the objective to conserve and enhance the District historic and cultural environment. Site 6 performs particularly poorly against this objective.

Sites 1, 4, 5 and 6 perform well against the criteria on archaeological importance whereas 2, and 7 have a medium impact against this objective. Site 3 has a medium/low impact against this objective due to the fact that the eastern boundary of the site borders a County Archaeological site.

All sites except 3 and 8 have a medium impact against the objective to maintain soil quality. These sites have a medium/low impact against this objective as they are Grade 3 agricultural land.

Site 8 performs particularly poorly against flood risk objectives whereas the site 4 has a medium impact against this objective. None of the other sites in Creech St Michael lie within areas of flood risk.

**Summary of Assessment against Residential Criteria:**

All sites except site number 8 have a medium impact against access to employment opportunities. Site number 8 performs well against access to employment opportunities as the site is within close walking distance from the Creech St Michael Business Park.

Sites 6, 7 and 8 are within 800m of a GP surgery. Sites 6 and 7 are within 400m from a Primary School and therefore perform well against this objective. Sites 6 and 7 are more than 400m but less than 600m from a convenience shop, and therefore perform relatively well against this objective. Sites 2, 4 and 5 have a strong negative impact against this objective whereas sites 1, 3 and 8 have a medium impact against this objective.

All sites have a strong negative impact against capacity of Primary and Secondary Schools within or near the settlement to accommodate additional school places, and all of the sites except site 4 have a strong negative impact against access to a Secondary School.

All of the sites except sites 2 and 3 perform relatively well against access to formal recreational facilities. All of the sites perform relatively well against opportunities for walking as there are Public Rights of Ways linking housing to services and employment. Site number 7 performs particularly well against this objective as there are Public Rights of Ways linking housing to services and employment directly south of the site.

All of the sites except site number 7 have a medium impact against opportunities for cycling. Site number 7 performs relatively well against this objective as there is a dedicated cycle link directly south of the site to Taunton where most of employment exists.

Sites 1 and 8 are within 200m from a bus stop and perform well against this objective. Site 3 is within 300m of a bus stop. Sites 2, 5 and 6 perform particularly poorly against access to a bus stop whereas sites 4 and 7 have a medium impact against this objective.

**Suggested Preferred Option(s):**

Sites 5, 6 and 7 all now have planning permission or resolutions to grant. These options appear to be the most appropriate sites for allocation in the Village.

<b>Settlement (and sites assessed): Milverton</b>	
1. Land west of Milverton 2. Land east of Saw Mill 3. Houndsmoor Lane 4. Land off High Street 5. Land at Houndsmoor Farm ADD11. West of Milverton Village Centre	ADD12. Land off Huntash Lane ADD13. Land at Butts Way ADD17. Station Road ADD16. Mount Farm ADD21. Land at Olands Lodge ADD22. Land off Creedwell Orchard
<b>Summary of Assessment against Environmental Criteria:</b>	
<p>None of the potential sites are within a close proximity to a national landscape designation or would affect a local landscape designation. All of the sites except sites ADD13 and ADD22 have a strong landscape impact. Sites ADD13 and ADD22 have a medium landscape impact.</p> <p>Sites 1, 2, 4, ADD11 and ADD17 have a potential to impact on international or national conservation sites or international or/and European protected species/habitats. 3, 5 and ADD21 perform well against the objective on nature conservation. Sites ADD12, ADD13, ADD16 and ADD22 have a medium/low impact against this objective due to the fact that the sites either border or are partially within an area of local conservation interest.</p> <p>Sites 1, 5, ADD13, ADD16 and ADD21 perform well against the objective to conserve and enhance the District's historic and cultural environment. Sites 2, 3 and ADD21 have a medium/low impact against this objective as the sites border a Conservation Area. Sites ADD11, ADD12 and ADD17 have a medium impact against this objective whereas site 4 performs particularly poorly against this objective.</p> <p>Sites 3, 5, ADD13, ADD16 and ADD21 perform well against impacts on archaeological importance. Sites 1, 4, ADD12 and ADD16 have a medium/low impact against this objective as they border an area of High Archaeological Potential or a County Archaeological site.</p> <p>Sites 5, ADD11, ADD12 and ADD21 have a strong negative impact on the objective to maintain soil quality. Sites 1 and ADD13 have a medium impact against this objective. Sites 2, 3, 4, ADD17, ADD16 and ADD21 have a low/medium impact against this objective as the sites are mainly Grade 3 agricultural land. Sites 2 and ADD17 have a medium impact against the objective to ensure that development is not at risk of flooding. None of the other sites lie within an area of flood risk.</p>	
<b>Summary of Assessment against Residential Criteria:</b>	
<p>All sites perform poorly against access to employment opportunities. Sites 3, 4, ADD11, ADD12, ADD17 and ADD22 are within 800m from a GP surgery, and therefore perform particularly well against this objective. Sites 1, 2, ADD16 and ADD21 are more than 800m but less than 1km from a GP surgery and therefore have a low/medium impact against this objective. Sites 5 and ADD13 have a medium impact against this objective.</p> <p>Sites ADD12 and ADD21 are within 400m from a Primary School and therefore perform particularly well against this objective. Sites 5 and ADD21 are more than 400m but less than 600m from a Primary School and these sites also perform relatively well against this objective. There is capacity at the school to accommodate the scale of development proposed. All sites perform poorly against proximity to a secondary school. None of the secondary schools near the settlement have capacity to provide additional school places.</p> <p>Site number 2 has a strong negative impact against proximity to a convenience shop. Sites 1, 3, 5, ADD13, ADD17 and ADD16 have a medium impact against this objective. Sites 4, ADD11, ADD12 and ADD22 are within 400m from a convenience shop and therefore perform particularly well against this objective.</p> <p>All of the sites in Milverton perform well against access to recreational opportunities. All the sites except site 5 are within 800m from a public open space designation. The site 5 is more than 800m but less than 1km from a Public Open Space. All of the sites perform poorly against opportunities for walking and cycling. Site ADD22 has a medium impact against these two objectives. There are very limited range of walking networks including the Rights of Way between housing, services and employment.</p>	
<b>Suggested Preferred Option(s):</b>	
Land at Butts Way is the Council's preferred option. Whilst the site is not as well-located and accessible as some of the other options considered, the site would not score so poorly against Landscape Impact, Nature Conservation or Archaeological Objectives as other sites. The site could provide a stronger, landscaped edge to the Village and deliver around 20 new homes.	

**Settlement (and sites assessed): North Curry**

1. Whitewell Cottage	6. South of Knapp Lane	11. North of Oxen Lane
2. Land at Stoke Road	7. North of Nine Acre Lane	12. Corner of White Street
3. E of St Peter's / St Paul's	8. South of Nine Acre Lane	13. Land at Manor Farm
4. NE of Manor House	9. Land off Windmill Hill	14. Land at Greenway
5. NE of The Fosse	10. Land off Greenway	15. South of Stoke Road

**Summary of Assessment against Environmental Criteria:**

None of the potential site allocations in North Curry are within a close proximity to a national landscape designation or would affect a local landscape designation. Sites 1, 2, 4, 5, 9, 10, 11, ADD15 and ADD20 have a strong landscape impact whereas sites 6, 8 and ADD14 have a medium landscape impact. All of the other sites in North Curry have low or not so significant landscape impact.

All of the potential site allocations in North Curry perform well against the objective on nature conservation. None of the sites in North Curry would impact on international or national conservation sites or international or/and European protected species/habitats, affect the Favourable Conservation Status of a Species listed under the Somerset Priority Species List (Somerset BAP), or affect Local Conservation interest.

Sites 1, 2, 6, 9, 11, 12, and ADD15 perform well against the objective to conserve and enhance the District's historic and cultural environment. The sites 4, 8 and ADD14 all border a Conservation Area and therefore have a medium/low impact against this objective. Sites 3, 5, 7, 10 and ADD20 have a strong negative impact against this objective.

Sites 2, 7, 9, 10, 11, 12, ADD15 and ADD20 perform well against the objective on archaeological importance whereas sites 1 and 5 have a medium impact against this objective. Sites 3, 4, 6, 8 and ADD14 all border an area of high archaeological potential or a County Archaeological site and therefore have a low/medium impact against this objective.

All of the sites in North Curry have a low/medium impact against the objective to maintain soil quality as all the sites are Grade 3 agricultural land. All of the sites in North Curry perform well against objectives on air quality, impact on existing un-neighbourly uses, water quality, flood risk and to maintain the separate identity of settlements.

**Summary of Assessment against Residential Criteria:**

All of the sites perform poorly against proximity to employment opportunities. All of the sites except sites 1, 2 and ADD20 are within 800m from a GP surgery and sites 1, 2 and ADD20 are more than 800m but less than 1km from a GP surgery.

Sites 7, 8, 10, ADD14 and ADD15 are within 400m of a Primary School and therefore perform well against this objective. Sites 6, 9 and 11 also perform relatively well against this objective as these sites are more than 400m but less than 600m from a Primary School. Sites 1, 2 and ADD20 perform poorly against proximity to Primary School whereas sites 8, 9, 10, 11, ADD14, ADD15 and ADD20 have a medium impact against this objective. All of the sites perform well against capacity of the existing Primary School to accommodate development. All of the sites perform poorly against access to a Secondary School. None of the Secondary Schools near the settlement have capacity to provide additional school places.

Sites 3, 5, 6, 7, 8, 12 and ADD14 are within 400m of a convenience shop and perform well against this objective. Sites 1, 4 and 9 are between 400-600m and perform relatively well against the objective.

All sites except ADD20 perform well against proximity to recreational areas. All sites except ADD20 and 2 are within 800m from an open space designation. Site 2 is more than 800m but less than 1km from an open space designation. All of the sites perform quite poorly against opportunities for walking and cycling, and the public transport provision in the village is limited.

Sites 2, 3, 6, and 7 are within 200m from a bus stop and perform well against this objective. Sites 4 and 5 are less than 300m from a bus stop and therefore perform relatively well against this objective. Sites 8, 9, 10, 11, ADD14, ADD15 and ADD20 have a strong negative impact against proximity to a bus stop whereas sites 1 and 12 have a medium impact against this objective.

**Suggested Preferred Option(s):**

Many of the sites considered in North Curry would have a significant landscape impact and/or also impact on historical/archaeological considerations. Land at Knapp Lane has a lesser landscape impact than most sites considered and lies in an accessible location. Land at Manor Farm (Overlands) is also relatively accessible and subject to sensitive design and the number of dwellings limited to respect the setting of the Listed Farm Complex can also be included.

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<b>Settlement (and sites assessed): Churchinford</b>
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1. Ford Farm
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<b>Summary of Assessment against Environmental Criteria:</b>
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<p>The site at Ford Farm lies wholly within a national landscape importance (AONB) and therefore, has a strong negative impact against the objective to protect, enhance and improve local distinctiveness and landscape and townscape quality. The site at Ford Farm also has a strong landscape and the site performs poorly against the objective to conserve and enhance the District's historic and cultural environment.</p> <p>The site at Ford Farm performs well against objectives on nature conservation as development here would not impact on international or national conservation sites or international or/and European protected species/habitats, affect the Favourable Conservation Status of a Species listed under the Somerset Priority Species List (Somerset BAP), or affect Local Conservation interest.</p> <p>The site also performs well against the objectives on archaeological importance, air quality, and impact on existing un-neighbourly uses, water quality, flood risk and maintaining the separate identity of settlements. The site is wholly Grade 3 agricultural land and therefore has a medium/low impact against the objective to maintain soil quality.</p>
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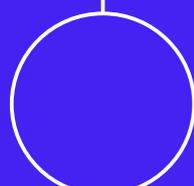
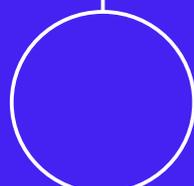
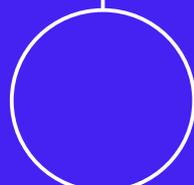
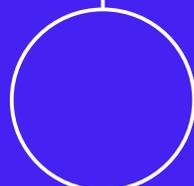
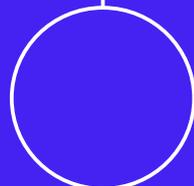
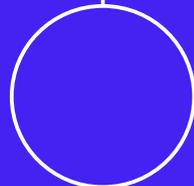
<b>Summary of Assessment against Residential Criteria:</b>
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<p>The site at Ford Farm performs poorly against proximity to employment opportunities, proximity to Primary and Secondary Schools, access to formal recreational facilities, opportunities for walking and cycling and capacity of public transport to accommodate further growth. The site has a medium impact against capacity of the Primary School to accommodate further growth. The site is less than 300m from a bus stop and therefore performs relatively well against this objective. The site is also within 800m from a GP surgery and the site therefore performs well against this objective. The site is also within 400m from a convenience shop and therefore performs well against this objective.</p>
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<b>Suggested Preferred Option(s):</b>
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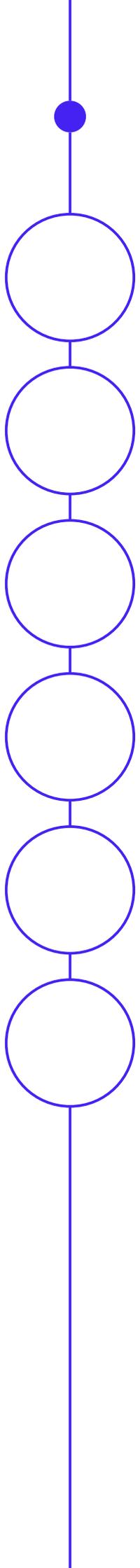
Ford Farm is the only option considered. There are no fundamental concerns identified by the SA to justify the exclusion of the site from the Preferred Options.
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# Statement of Community Involvement



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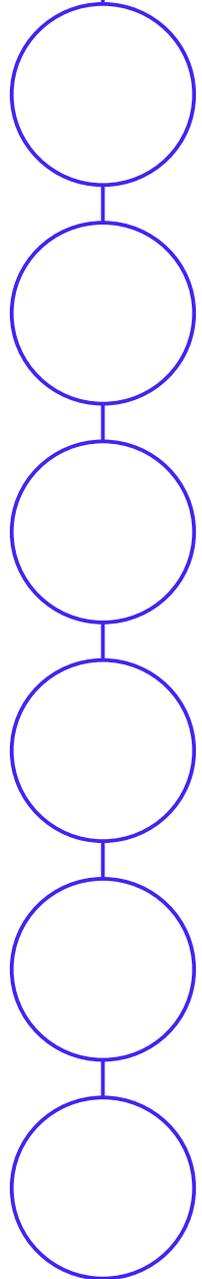
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# Introduction – What is a Statement of Community Involvement

## Introduction – What is a Statement of Community Involvement

Our Statement of Community Involvement (SCI) sets out how Taunton Deane Borough Council will involve the community and stakeholders in the preparation, alteration and review of local planning policy and the consideration of planning applications. This our second SCI and has been prepared to take account of changes to planning policy nationally and the way in which the Council is structured and organised.

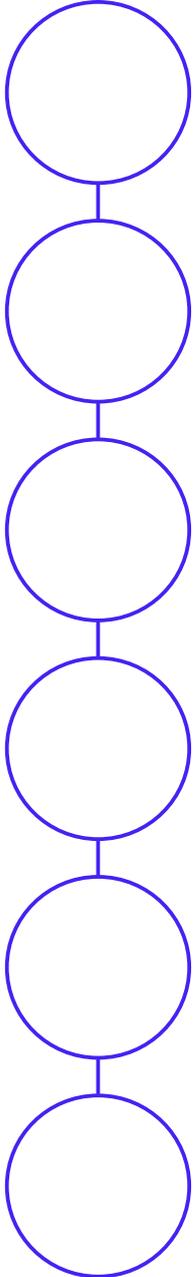


# Why have an SCI?

## Why have an SCI?

Decisions on where new homes, jobs and shops, etc should go must take account of the capacity of infrastructure and other local constraints. Often, local communities have the best understanding of how their areas work. To this end it is vital that the views of local communities and other stakeholders are taken into account through both plan-making and decision-taking (development management) processes.

We also have a legal duty to consult in the preparation of local plans and on planning applications. These duties and responsibilities are set out in a number of pieces of legislation including the Planning and Compulsory Purchase Act (2004), the Localism Act (2011), the (1990) Town and Country Planning Act and recent (2012) Neighbourhood Planning Regulations.

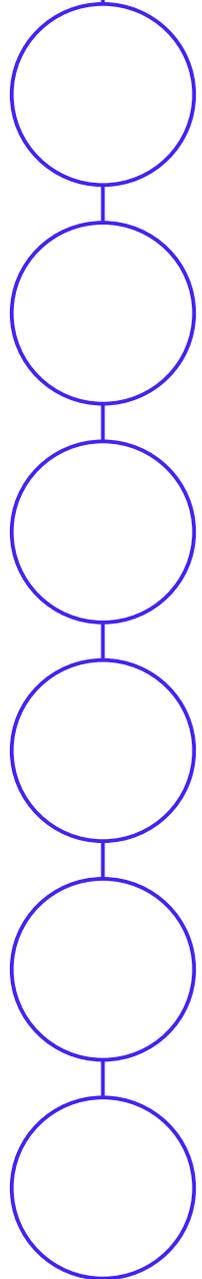


# How can you get involved?

## How can you get involved?

There are two areas of planning that you can be involved in:

- **Plan preparation** (Development Plan Documents) - setting the policy framework against which development proposals will be assessed. Decisions on planning applications are made in line with these local planning documents.
- **Planning applications** (Development Management) - most types of development require a planning application to be submitted and approved. Anyone can view and make comments on a planning application.



# Corporate Context

## Corporate Context

Our first SCI was adopted in 2007, it was one of a suite of documents aimed at developing a shared Vision for the future of Taunton Deane. Since 2007 there have been a number of changes to planning policy, the Council's wider approach to engagement and the way in which it is organised. The original context for this vision has moved on and these National, Corporate and Equalities changes should be reflected in an updated SCI.

We are committed to being a Council for the Community. Our Corporate Consultation Policy identifies the following Core Values:

- Aim for the highest standard of consultation practice – having a programme of improving the quality of consultation and research across the Council will be implemented and regularly monitored;
- Seek community's views as an essential part of the evidence base for its decision making – public will be invited to be actively involved in community planning, best value reviews and other Council processes, and will be informed how their views affect action in the community;
- Work towards full involvement of all elements of community and recognise different viewpoints via appropriate consultation techniques – as part of equality review, good practice on how to gain views of hard to reach groups will be made widely available;
- Flexible approach to seeking views and diverse ways of consulting and involving the public – review of consultation and research will be conducted, further information technology and other innovative tools will be examined;
- Target planning of our services by sharing information on established needs and aspirations of the community – sharing consultation and research information;
- Add value by sharing information with resources across partner agencies – invest in Somerset Influence and other County wide initiatives for sharing information, seeking opportunities for joint resourcing and training;
- Invest in building the skills of our staff as researchers and consultation experts – full training programme to equip staff with appropriate high-level consultation and research skills will be designed and implemented. Regular updates on consultation issued to members.

The Taunton Deane Partnership (TPD) previously known as the Local Strategic Partnership (LSP) is a group of representatives from the public, voluntary and private sectors that work together to improve the quality of life of the local community. It aims to help coordinate and improve local services and has published a Priority Area Strategy this supersedes the previous Sustainable Community Strategy. The

# Corporate Context

Partnership comprises a number of sub-groups including the Spatial Planning Working Group. This group acts in a co-ordinating role helping to ensure that community planning is reflected in our emerging local plans. It also advises on best practice for community consultation. We have worked closely with the SPWG in the shaping of this revised SCI.

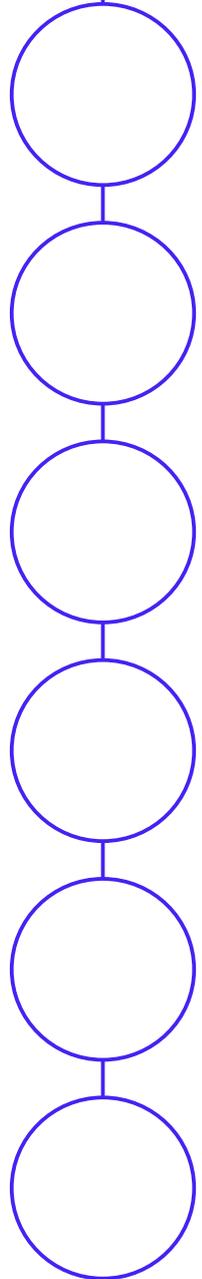
We now produce an Equalities Information Report. This Report provides a profile of the area against the Equality Act's protected characteristics. It is used by us to ensure the needs of particular groups are taken into account in the shaping of Council Policy.

To aid the Council in identifying potential inequality an Equality Impact Analysis (EIA) is undertaken for all reports, policies and significant projects. This should enable TDBC to anticipate and recommend ways to avoid discriminatory or negative consequences for a particular group. The revised SCI will be subject to an Equality Impact Analysis prior to its adoption.

Our new Corporate Business Plan identifies 'Quality Sustainable Growth' as its first aim. Against this aim are two objectives:

- Facilitate a significant increase in the number, quality and range of available houses within the Borough, including the highest achievable proportion of affordable housing;
- Delivering the infrastructure necessary to bring forward development opportunities.

Our SCI builds on the Corporate Consultation Policy to set out how the Council will consult with the development industry, local communities and stakeholders to produce effective and robust planning policy and development management decisions to deliver the necessary housing and infrastructure. The SCI needs to be aware of and take account of the other documents and groups listed above. To this end we have shared and discussed a draft of this SCI with the Community Planning Working Group and LDF Steering Group and taken on board a number of their suggestions.



# Community Involvement in Planning Policy

## Community Involvement in Planning Policy

### The Planning System

The planning system requires local authorities to produce local development documents. These set out the spatial strategy for an area and associated policies to manage land uses. They provide the basis on which planning applications are determined.

Planning Legislation, regulations and guidance set out what documents must be produced, how they must be developed and examined by an independent Examiner.

Further information regarding the council's programme for preparing development plan documents is contained in the Local Development Scheme.

Copies of the Local Development Scheme are available from:

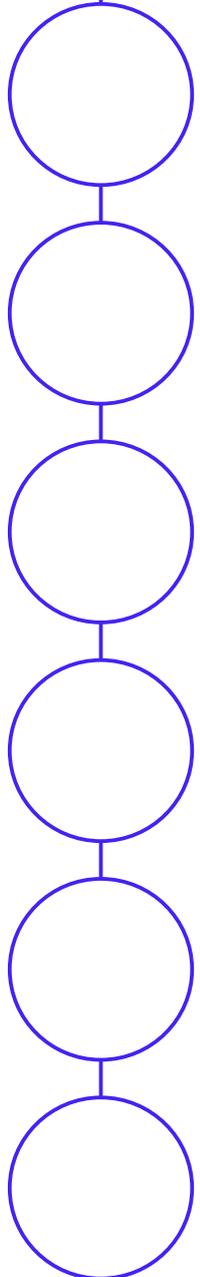
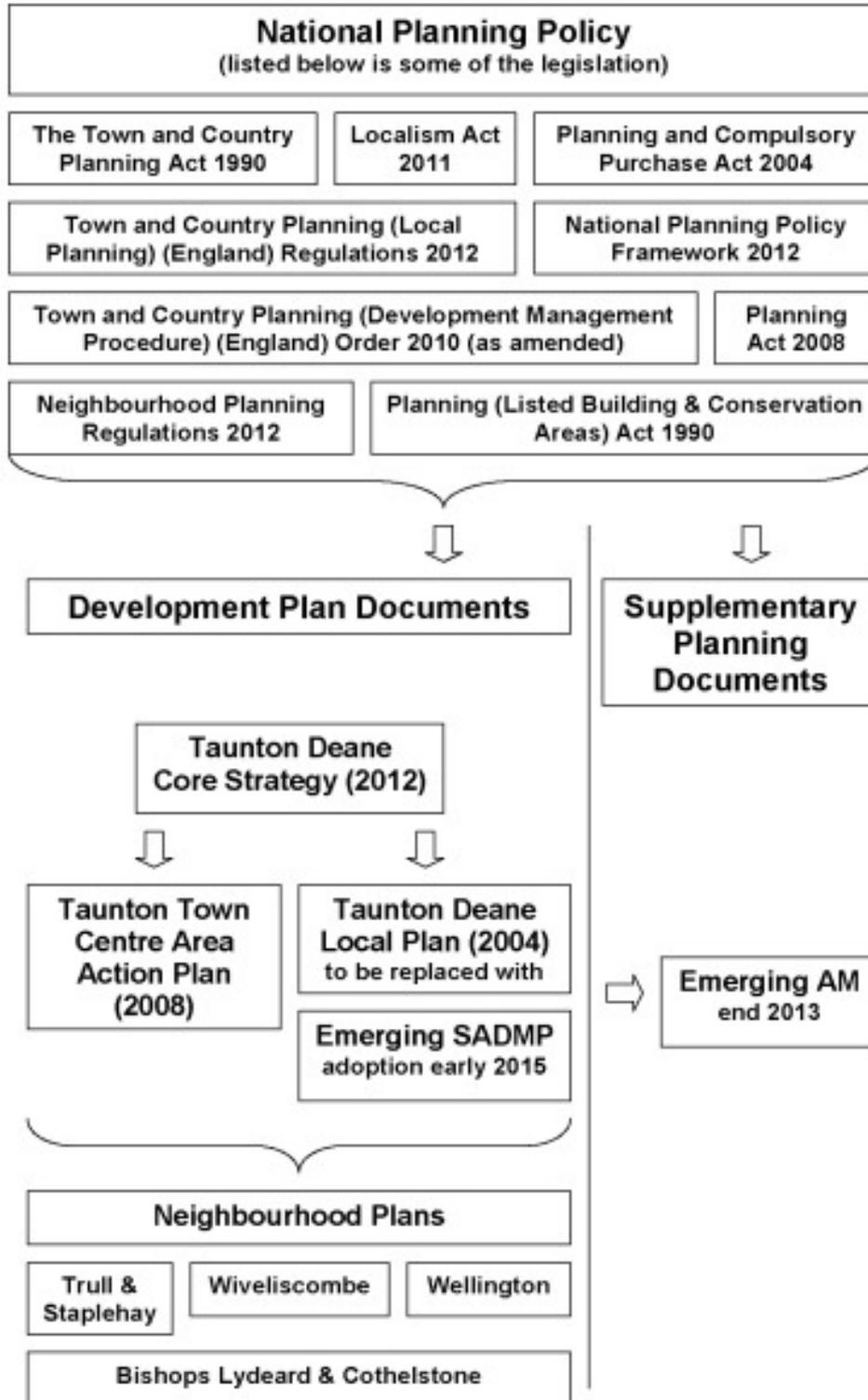
- the council's website – [www.tauntondeane.gov.uk](http://www.tauntondeane.gov.uk)
- the council's office – Deane House, Belvedere Road, Taunton, TA1 1HE

The Statement of Community Involvement will be used by the Council to guide the our approach to the consultation undertaken in the preparation of our local plans.

There are two types of local plans: Development Plan Documents and Supplementary Planning Documents.

# Community Involvement in Planning Policy

## Current Local Planning Coverage in Taunton Deane



# Community Involvement in Planning Policy

## Development Plan Documents

The Core Strategy, emerging Site Allocation and Development Management Policies Plan, adopted Local Plan and Taunton Town Centre Area Action Plan are all types of Development Plan Documents (DPDs). These plans set out policies and proposals for the regulation and use of land within the Borough.

Each DPD goes through a series of formal stages of production prior to adoption. These comprise the consideration of alternative options, public consultation, a publication stage at which formal representations are made and submission for independent examination.

Following the most recent changes to the Planning Regulations, the only formal stages in the production of a development plan document are:

- Pre-publication consultation – this could be undertaken once or a number of times. The exact scale and extent of consultation may depend on the scope and content of the Plan being prepared.
- Publication – at which point stakeholders and members of the community can make formal representations on the Plan. These representations are ultimately put before an Examiner considering the soundness of the Plan.
- Submission – the Council must submit the published plan to the Secretary of State along with all representations received at the publication stage.
- Examination – an independently appointed Examiner will consider the soundness of the Development Plan Document against several tests as well whether the Council has complied with the relevant Regulations.
- Adoption – following receipt of the Examiner's Report (and subject to the Plan being found sound) the Council can formally adopt the Plan as a Development Plan Document.

## Strategic Environmental Assessment

The planning system requires DPDs to go through a process called a Strategic Environmental Assessment (SEA). The purpose of an SEA and Sustainability Appraisal (SA) is to assess the effects of the plan on the environment.

An SEA/SA is produced when starting the process of DPD preparation; it is consulted on to allow interested parties to make representations on what it should contain.

An SA is undertaken when preparing each stage of a DPD, and a report is consulted on throughout the plan-making process, at the same time as the DPD.

Where both these documents are required TDBC may combine them into one publication.

# Community Involvement in Planning Policy

An SA is not generally required for SPDs. <sup>(1)</sup>

## Supplementary Planning Documents

These provide additional information or detail on the policies in the Development Plan Documents, examples of SPDs include; masterplans, development briefs, design guidance or issue based documents – green space strategy, energy efficiency strategy or affordable housing strategy. The preparation of SPDs has slightly different formal requirements to a DPDs.

Following the most recent changes to the Planning Regulations, the only formal stages in the production of a development plan document are:

- Publication – at which point stakeholders and members of the community can make formal representations on the Plan. Representations received will be collated into a report which also says how the issues have been addressed.
- Adoption – following consultation the document will go before Council Members for formal adopt.

## Neighbourhood Planning

In 2012 Government introduced a new community led planning policy tier, Neighbourhood Plans and Neighbourhood Development Orders. TDBC is only responsible for notification of regulatory stages in the Neighbourhood Plan process:

- Designation of an area and appropriate body or forum - at which point stakeholders and members of the community can make formal representations on the compliance of the area and body with the regulations
- Publication – at which point stakeholders and members of the community can make formal representations on the Plan. These representations are ultimately put before an Examiner considering the soundness of the Plan.
- Examination – an independently appointed Examiner will consider the soundness of the Development Plan Document against several tests as well whether the Neighbourhood Plan Group has complied with the relevant Regulations

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1 The Planning Act 2008 altered Section 19(5) of the 2004 Act removing the requirement for local authorities to produce an SA for SPDs. A separate SA is not required if the SPDs do not contain any new policies, but provides supplementary guidance relating to policies set out in overarching local plans that have been subject to SA. If the SPD is likely to give rise to significant effects the impacts of which have not been formally covered in the appraisal of the parent plan or where an assessment is required by the Strategic Environmental Assessment (SEA) Directive then an assessment may be required.

# Community Involvement in Planning Policy

- Adoption – following receipt of the Examiner’s Report (and subject to the Plan being found sound) the Plan is put to a local referenda, if a majority support the Plan the Council can formally adopt the Plan as a Development Plan Document

Other elements of engagement and consultation will be the responsibility of the appropriate body.

The Neighbourhood Planning Regulations<sup>(2)</sup> set out who must be consulted at which stage.

## Who we will consult

We will consult people at various stages in the development of local plans. The Town and Country Planning Regulations require Local Planning Authorities to meet a minimum level of community involvement and specifically a number of organisations which must be consulted if the Council consider that they will be affected, known as Statutory Consultees and General Consultation Bodies. A list of Statutory Consultees, General Consultation Bodies, and other organisations and groups the Council proposes to involve in plan-making included in Appendix A.

In addition to meeting its statutory obligations, the Council is committed to ensuring that local groups, organisations and individuals are provided with the opportunity to be involved in the preparation of local development documents.

TDBC has a database of consultees, who have either commented upon or expressed an interest in being involved with the development of local plans. This database is used to keep individuals, companies and organisations informed on the production of any local plans. New consultees can add themselves to the consultation database via the TDBC consultation portal or can write to the Policy Team requesting inclusion on to the database. The Data Protection Act will be followed to ensure personal data is kept securely and personal details are not disclosed.

## Consultation methods

The Town and Country Planning (local Planning) (England) Regulations 2012 sets out the minimum requirements for public participation in the preparation of Development Plan Documents. These are marked with an “M”. The Council aims to go beyond these requirements to enable the local community, stakeholders and organisations that want to participate aware of and able to engaging in shaping the Local Planning Documents, these are marked with •.

A variety of methods will be used at various stages of the planning process to enable community involvement in the preparation of local plans. These methods included, but are not limited to:

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2 The Neighbourhood Planning (General) Regulations 2012: statutory instrument 2012 No. 637

# Community Involvement in Planning Policy

**M The website** – consultation activities will be publicised through the Councils website, on the Planning Policy pages, the home page and dedicated DPD. specific pages. Adopted local plans evidence base will also be available for download. Our consultation portal will be available for people to read the comments and provide comments online.

**M Inspection Points** – hard copies of documents will be available for inspection at the Council Offices during consultation periods. In addition we may also make them available at local libraries and community centres. Copies of the evidence base will also be available to view on request at Deane House.

**M E-mails** – notifications will be sent to statutory bodies, stakeholders, relevant groups and other individuals and organisations on our consultation base. The Councils Planning Policy team is contactable via e-mail, [talkingtomorrows@tauntondeane.gov.uk](mailto:talkingtomorrows@tauntondeane.gov.uk) .

**M Letters** – where we have no e-mail details notifications will be sent to statutory bodies, stakeholders, relevant groups and other individuals and organisations on our consultation base where we only have a postal address or they have specifically requested to be contacted by post.

- **Local News Media** – Public Notices will be placed in the Somerset Gazette and Wellington Weekly. Advertisements will include details on when and where planning documents can be inspected, how copies can be obtained, the closing date for representations and where to send them. We will also issue a press release to all local news media and utilise the Deane Dispatch pages of the Somerset Gazette to inform people.
- **Involve...** - an electronic newsletter is circulated to all schools, equalities organisations, members, parish and councils, libraries and community centres, organisations for hard to reach groups in the Borough (i.e. age concern, Somerset Chinese organisation, compass disability, etc).
- **Leaflets** – leaflets, flyers and brochures may be distributed separately, or with other Council correspondence, to summarise detailed information.
- **Public exhibitions/displays/roadshows** – for larger consultation events, the Council may promote the consultation at an exhibition, display or roadshow. This has the ability to target members of the community who may not get involved through electronic media or more formal methods.
- **One-to-one meetings** – with individuals, groups, organisations and stakeholders as appropriate, to provide the opportunity for exchange on information, discussions and problem solving. However, it is the responsibility of the individual, group or organisation to submit written comments after the meeting if they wish.

# Community Involvement in Planning Policy

- **Presentations** – to groups, organisations and stakeholders as appropriate, to target particular people in the community who may be interested in a specific issue.
- **Questionnaires, Surveys or focus groups** – such research can target people with particular interests or characteristics and determine attitudes towards particular issues and options.
- **Community and resident meetings and groups** – use of pre-existing community and resident meetings to target people with specific characteristics or interests.
- **Interactive workshops** – used to identify and focus discussion around issues and key themes. This informal environment may help to reach people who might not get involved with more formal processes.
- **Social Media** – we may advertise consultation through the Councils Twitter account with additional tweets if appropriate during the course of the consultation.
- **Council Meetings** – where appropriate plans and evidence base will be taken to the following Members meetings: LDF Steering Group, Leaders, Portfolio Holders Briefing, Political Groups, TDBC's Scrutiny, Executive and Full Council meetings. It may also be useful to take information to the following corporate meetings: Leads and Corporate Management Team.

We recognise that some of the methods outlined above may not suit everybody, however it is hoped that the variety of methods will enable a wide range of people to get involved in the consultation process.

In line with the Councils Participation Strategy/Equalities legislation, all of our publications will be written clearly and concisely, explaining any technical terms or language, using images and pictures where practical. A translation facilities box will be included on all consultation and adopted DPDs and SPDs. We will also offer an appropriate timescale for representations to be received to allow everyone to have the chance to participate.

## Equalities and Diversity

The Equality Act (2010) defines nine “protected characteristics”: age, disability, gender reassignment, marriage or civil partnership, pregnancy and maternity, race, religion or belief, sex and sexual orientation. The Council will aim to ensure that these characteristics do not effect people’s ability to respond to our consultation and have their views heard.

# Community Involvement in Planning Policy

It is recognised that some groups are harder to engage with than others. These can include: those for whom English is not their first language, people with disabilities, children and young people, older people, gypsies & travellers, ethnic minorities, and the homeless. This is not an exhaustive list, it provides an indication of the breadth of harder to reach groups. Such groups may not be engaged by or may be unable or unwilling to engage in traditional consultation methods.

The Council will endeavour to take account of barriers faced by these groups and try to overcome these by using alternative methods of consultation, or by asking affected groups or individuals how they would like to be involved.

Using expertise and networks of communication already established throughout different areas of the Council to engage such groups. Where appropriate; meetings or presentations will be held at a mutually convenient time and venue with such groups.

Appendix A provides a list of some of the key community and voluntary organisations in Taunton Deane with links to equality and diversity groups to assist with consultation and engagement. This is not an exhaustive list.

## What we do with representations received – planning policy

We will read and publish all representations received and respond to those which are related to planning policy. Because we get a large number of responses we cannot always respond individually to them, but we will produce a summary document which will be published on our website or consultation portal.

All representations received will be public documents and as such will be available for other to see. In line with the Data Protection Act we will not publish personal information such as e-mails, signatures, telephone numbers or addresses. We cannot keep your name secret.

The Council will not accept comments that are offensive, obscene, racist or illegal. We may pass any such material to the Police.

A statement of consultation will be produced which contains an overview of the consultation activities undertaken, summary of representations and how or what the Council will do to accommodate these into account in the final document. A copy of this statement will be available on the TDBC website and at the Councils Planning Reception at Deane House.

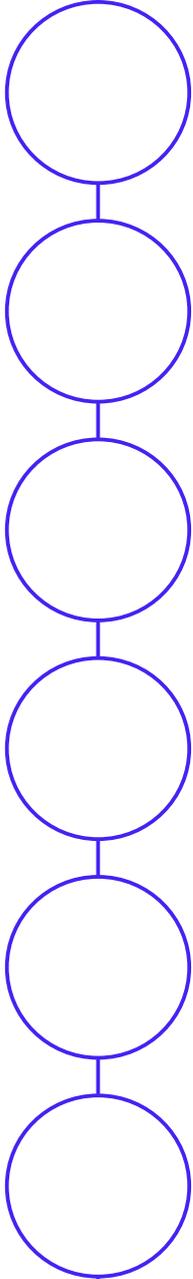
For Council DPDs and SPDs a report outlining the main issues raised in representations and recommendations for future actions will be taken to the LDF Steering Group.

When submitting a DPD to the Secretary of State the Council is also required to submit a statement of compliance setting out which bodies and other persons have been consulted, how they have been consulted, the main issues that were raised and how these have been addressed.

# Community Involvement in Planning Policy

The level of service you can expect from the Council is set out in our Customer Charter. If a person is not happy with the service they have received they should contact the Planning Policy team in the first instance. If they are dissatisfied with the response they can make a formal complain through the Councils Complaint Procedure.

The Local Government Ombudsman investigates complaints of injustice arising from misadministration by Local Government and certain other bodies. The Ombudsman can investigate complaints about how a Council has done something. However, they can not question that a Council has done simply because someone does not agree with it. [www.lgo.org.uk](http://www.lgo.org.uk)



# Community Involvement in Development Management

## Community Involvement in Development Management

### The Planning Application Process

Development Management decisions shape the character of an area. The Council determines a range of applications from household extensions, fences, listed building and conservation area applications, changes of use, advertisements to major housing and business premises. <sup>(3)</sup>

There are three stages at which the local community and stakeholders are consulted and/or notified on development proposals: pre-application stage, application stage and when a decision has been made.

Because Taunton Deane is rarely the applicant for planning permission, this section of the SCI is primarily focused on setting the standards we would expect an applicant to follow prior to making an application for planning permission. Beyond this, the Borough Council has a duty to ensure applications and decisions are properly publicised but in order that the public and stakeholders can meaningfully influence the process, it is important to ensure that consultation is 'frontloaded' and undertaken prior to an application being made.

Planning Acts, Orders and Regulations set out the minimum consultation the Council and applicants are required to undertake, the requirements for pre-application consultation and the duty to take account of the responses from it.

### Pre-application (for the applicant to undertake)

There are benefits to early engagement with the Council and local community as well as key stakeholders. It can be helpful in identifying and addressing issues before applications are submitted, shaping the design of the development and ensuring sufficient information is submitted for an application to be registered and a recommendation made.

An applicant's early engagement with the Council is important and can vary from a short conversation with a Council Officer to a number of meetings with various TDBC departments and Elected Members. Open and transparent consultation with Parish and Town Councils at public meetings is recommended. Advice from the Council and Parish or Town Councils is confidential and will be "without prejudice" to any eventual decision of an application. Since 2012 pre-application advice has been subject to payment of an appropriate fee. The fee is based on the size and type of development. Details of the fees are on the TDBC web site:

[www.tauntondeane.gov.uk/public/council/departments/department/?id=guid%2F409d7309-a538-2c10-268d-cd440c84b8ec](http://www.tauntondeane.gov.uk/public/council/departments/department/?id=guid%2F409d7309-a538-2c10-268d-cd440c84b8ec)

3 Applications for waste, minerals and major highway schemes are considered by Somerset County Council. Applications for nationally significant infrastructure projects are considered by the Planning Inspectorate.

# Community Involvement in Development Management

We recommend that all applicants undertake appropriate and effective pre-application consultation with the community before submitting an application. The Council's Development Management and Policy Teams can advise of the relevant issues and suggest ways to involve and inform the community. Every planning application is individual therefore the scale of community consultation and techniques used will vary, appendix B contains examples; but not an exhaustive list of different types of engagement.

The Council has a tiered approach to the level of pre-application consultation we would like to see the applicant undertake.

- **Significant & Departure Applications:** applications where there are considerable issues of scale and controversy, and/or the application is contrary to or out of line with the Development Plan (a "departure" application). This includes departures not covered by Circular 02/09.

Examples, but not an exhaustive list, include: Strategic Site Allocations, large scale retail or residential development, departures from TDBC's Core Strategy, Taunton Town Centre Area Action Plan or Site Allocations Document, applications requiring a full transport assessment, proposals to remove community facilities – such as development on playing fields, developments for significant new retail floor space, schedule 1 and 2 developments under Environmental Impact Assessment Regulations <sup>(4)</sup>.

- **Small Scale & Other Minor Applications:** applications for sites that are of local significance or are sensitive to development pressures and allocated sites that have not generated significant objection in the Development Plan Document process.

Examples, but not an exhaustive list, of local significance and sensitive sites include: developments which impact on a local landmark, propose the loss of a community facility – such as post office or public house, sites within a Conservation Area, Area of Outstanding Natural Beauty (AONB) or Site of Special Scientific Interests (SSSI).

The Council recommends that all pre-application consultation be presented within the appropriate policy context, relevant national and local policies and links to local strategies.

The applicant should provide a summary of the pre-application community involvement and/or consultation when they submit a planning application. It should include: a list of the organisations, bodies and people who engaged with the consultation, a summary of their responses and explain how the developer has amended their scheme to take account of any relevant issues raised. The Council expects reasonable access to all information relating to the community involvement undertaken.

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4 The Town and Country Planning (Environmental Impact Assessment) Regulations 2011

# Community Involvement in Development Management

A number of bodies can advise and provide training to communities on a range of planning issues including pre-application engagement, representations to planning applications and planning policy consultations. Planning Aid England provides a range of advice and support to individuals and communities. See their web site for more information: <http://www.rtpi.org.uk/planning-aid/> . The Planning Portal also provides information on the planning system to individuals, developers and Councils: <http://www.planningportal.gov.uk> .

## Application (for the Council)

Once an application has been received it will be registered. When it has been validated it will be included on the weekly application register. The register as well as all information and correspondence pertaining to the application will be available on the Council's website: [www.tauntondeane.gov.uk/planning](http://www.tauntondeane.gov.uk/planning). Paper copies of current planning applications will also be available to view on request at Deane House Planning Reception.

The Town and Country Planning (Development Management Procedure) (England) Order 2010 requires the Council to consult with the community. For certain type of applications TDDB is also obliged to consult with specific groups and organisations, often referred to as statutory consultees, these are listed in Appendix B. Consultation will be proportionate to the application being considered.

The Council is required to publicise the application, either by site notice or write to neighbours. The site notice/s will be placed in a prominent position on or near the site. For some larger developments, applications contrary to the local plan and some statutory applications, such as those effecting Listed Buildings or Conservation Areas, a Public Notice will also be placed in that section of the local newspaper. <sup>(5)</sup>

The letter, notice or advert will contain details of the planning application and information on where plans and any supporting documents accompanying the application can be viewed. It will also explain where to make representations and when they have to be returned to the Council.

The Council has a Neighbourhood Leaflet with information on the Development Management process, the community's role in it and guidance on how to comment on applications. The leaflet is sent out with letters and is also available from Deane House Planning Reception and on the Council's website:

[www.tauntondeane.gov.uk/public/councildepartments/department?id=guid409d7309a5382c10268dcd440c84b8c](http://www.tauntondeane.gov.uk/public/councildepartments/department?id=guid409d7309a5382c10268dcd440c84b8c)

5 Article 13 Town & Country Planning (Development Management Procedure) (England) Order 2010 (as amended), DMPO, and Regulation 5 Planning (Listed Building and Conservation Areas) Regulations 1990 (as amended), and Section 67 & 73 Planning (Listed Building and Conservation Areas) Act 1990 to be amended by the Planning and Compulsory Purchase Act 2004)

# Community Involvement in Development Management

Sometimes planning applications are revised after they have been submitted; this could be as a result of matters of concern or items raised in objections. In these cases, the Council may re-consult those people originally notified of the application to give them the opportunity to comment on the amendments. The Council has a statutory time limit within which TDBC has to determine most applications. Given this a 14 day response period will usually apply for re-consultation.

Representations received will be put with the application documentation on the Council's website. The Council will only be able to consider matters relating to planning and the planning application.

Parish Councils are consulted on the majority of applications in their area, other than those that are determined by them Under the Boroughs Parish Delegation Scheme – Milverton, Pitminster and Wellington.

## What happens to comments received?

The Council will only be able to consider matters relating to planning and the planning application. Where appropriate, comments may result in changes to an application, conditions attached to an application decision to address particular issues or refusal of an application. There are nearly always differing views and competing interests, we are required to make informed decisions having regard to national and local planning policies, development impacts and what will be in the best interest of the community.

## Decisions

For most minor and householder applications decisions are made by the Planning and Development Manager under powers delegated from the Planning Committee.

For major, significant and controversial applications decisions are made by Councillors on the Planning Committee. The Development Management Officers prepare a report for committee outlining the proposal, issues raised and recommendations of either approval, approval with conditions or refusal.

Any person who has made a representation will be notified when the application is to be reported to the Planning Committee for determination. The Council has written a Planning Committee Leaflet which explains the Planning Committee Process and how individuals are able to make representations at such meetings. This leaflet will be enclosed with the letters; copies are also available at The Deane House Planning Reception and on the Council's website.

On occasion the Secretary of State calls-in an application. The Council will provide copies of all correspondence to the Secretary of State and publicise the call-in on its website.

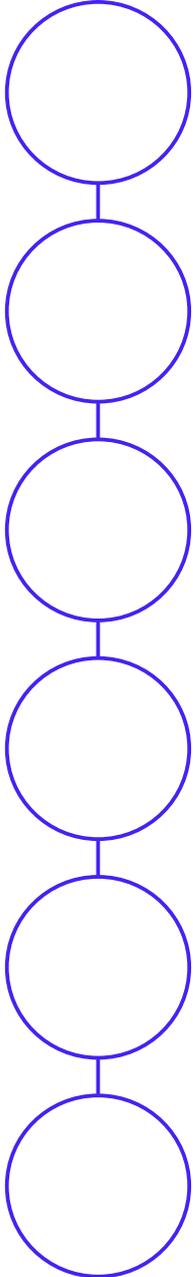


# Monitoring and Review

## Monitoring and Review

The contents of the Statement of Community Involvement will be regularly reviewed in order to keep up to date with any changes in policy, to update consultee groups, where necessary, and to review the relative success of the various community involvement measures undertaken.

TDBC's online consultation portal allows for registered consultees to input equal opportunities monitoring data when signing up to the system. If completed, this will help us to monitor the effectiveness of our policies surrounding equal opportunities and make changes where required. In addition we may include an optional monitoring form alongside the consultation response form.



# Appendix A – stakeholders to be involved in local planning policy

## Appendix A – stakeholders to be involved in local planning policy

### Specific Consultation Bodies

The specific consultation bodies which the Regulations<sup>(6)</sup> require the Council to consult are:

- Town and Parish Councils in the Borough and adjacent to the Borough
- Adjacent District Council (Sedgemoor, South Somerset, Mendip, West Somerset, East Devon, Mid Devon)
- County Councils (Somerset & Devon)
- Blackdown Hills AONB
- Quantocks AONB
- Exmoor National Park
- Avon and Somerset Constabulary
- Marine Management Organisation\*
- Natural England
- NHS Somerset and Primary Care Trust (from April 2013 these were replaced by Somerset Health & Wellbeing Board, NHS Clinical Commissioning Group and NHS Commissioning Board)
- Relevant communications companies (such as BT, Broadband Delivery UK, Mobile Network Companies, Mobile Operators Association)
- Relevant electricity and gas companies (such as National Grid, West & Wales, Western Power Distribution)
- Relevant sewerage and water undertakers (such as Wessex Water, Parrett Drainage Board, Somerset Drainage Board Consortium, South West Water)
- The Coal Authority\*
- The Environment Agency
- The Highways Agency

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6 Town and Country Planning (Local Planning) (England) Regulations 2012

## Appendix A – stakeholders to be involved in local planning policy

- The Historic Buildings and Monuments Commission for England (English Heritage)
- The Homes and Communities Agency
- Network Rail
- The Secretary of State for Transport

\*Unlikely to be relevant for Taunton Deane Borough Council.

### General Consultation Bodies

The Regulations also require the Council to consult general consultation bodies, where appropriate. For TDBC, these include:

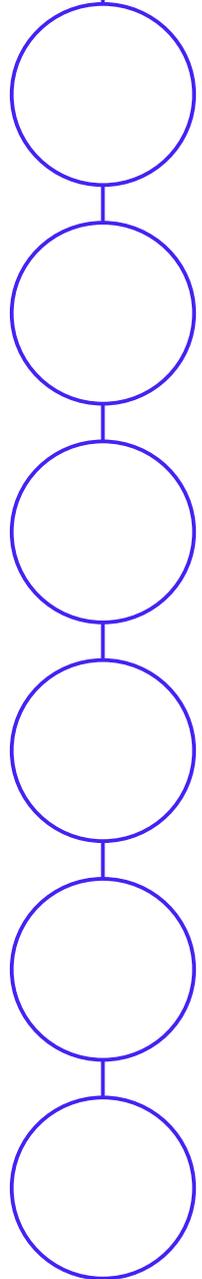
- Community/resident groups (such as Friends of Wellington Park, Blackbrook and Holway Residents Association, Community Council for Somerset)
- Developers, house builders, the development industry and their agents
- Local business groups (including local business forums such as Somerset Chamber of Commerce, Wiveliscombe Business Group)
- Local community action groups (e.g. Transition Towns, Creech Local Action Team)
- Local community transport groups (such as Wive Link)
- Local disability groups (see hard to reach groups)
- Local education trusts and associations (such as Somerset College, Somerset Skills & Learning, Travellers Education Service)
- Local environmental groups (e.g. Somerset Ecological Record Centre, Somerset Wildlife Trust, Somerset Garden Trust, Somerset Hedge Group)
- Local health associations (such as Somerset Ambulance Trust, Taunton and Somerset NHS Foundation Trust, St Johns Ambulance)
- Local housing groups and associations (such as Taunton Deane Sheltered Housing Forum, Falcon Housing,
- Local history and conservation groups (e.g. Building Preservation Trust)
- Local leisure and sport groups (e.g. Tone Leisure, Wellington District Sports Federation, Somerset Cricket Board, Somerset Playing Field Association)
- Local racial, ethnic or national groups (see hard to reach groups)

## Appendix A – stakeholders to be involved in local planning policy

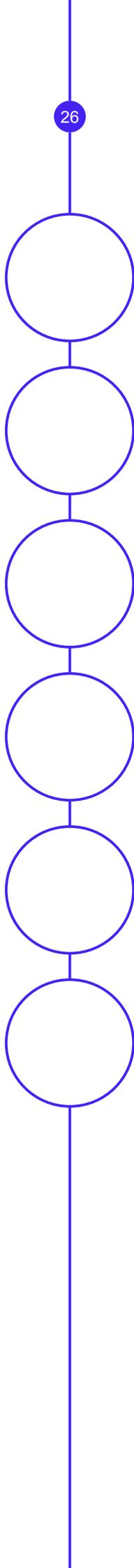
- Local registered providers (such as Falcon Rural Housing, Raglan Housing Association)
- Local religious groups (e.g.
- Local resident associations
- Local retail associations
- Neighbourhood Watch groups (see hard to reach groups)
- Older persons groups (see hard to reach groups)
- Voluntary organisations (see hard to reach groups)
- Youth groups, schools and colleges

We will also involve local residents and the following organisations, where necessary:

- DCLG
- Home Office
- Department for Education
- Department for Environment, Food and Rural Affairs
- Department for Transport
- Department for Health
- Department of Business, Innovation and Skills
- Department for Culture, Media and Sport
- Department for Work and Pensions
- Ministry of Defence
- Ministry of Justice
- Office of Government Commerce
- Age UK
- Airport operators
- Chemical Business Association
- British Geological Survey



## Appendix A – stakeholders to be involved in local planning policy

- 
- Centre for Ecology and Hydrology
  - British Chambers of Commerce
  - Church Commissioners
  - Civil Aviation Authority
  - CABE and the Design Council
  - Crown Estate office
  - Diocesan Board of Finance
  - Disabled Persons Transport Advisory Committee
  - Environmental groups at national, regional and local level, including Council for the Protection of Rural England (CPRE), Friends of the Earth, Royal Society for the Protection of Birds (RSPB), the Woodland Trust and other Wildlife Trusts
  - Equality and Human Rights Commission
  - Fields in Trust
  - Fire and rescue services
  - Forestry Commission
  - Freight Transport Association
  - Gypsy Council
  - Health and Safety Executive
  - Home Builders Federation (HBF)
  - Learning and Skills Council
  - Local public transport operators
  - Network Rail
  - Rail companies and the Rail Freight Group
  - Regional housing boards
  - Road Haulage Association
  - Sport England

# Appendix A – stakeholders to be involved in local planning policy

- Tenancy Services Authority
- Gypsy and Traveller Law Reform Coalition
- Women’s National Commission

The Council retains a large consultation database of all interested groups and bodies allowing it to target consultation exercises accordingly.

## Hard-to-Reach Groups

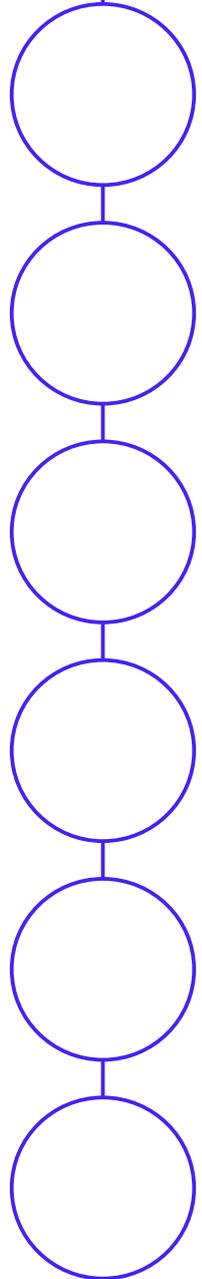
The Council intends to specifically target and engage the following groups who represent hard-to-reach sectors of the community we have traditionally struggled to involve in the plan-making process. Please note, this is not an exclusive list (the Council will look to work with any other groups that come to light during consultation periods):

### Older people's groups:

- Age Concern Somerset
- Help the Aged
- Senior Citizens Association
- Taunton and District over 55's
- Taunton Old Peoples Housing Society
- Taunton and Wellington Pensioners Forum

### Young people's groups

- Youth Centres (e.g. Trident Community Association)
- Connexion
- Somerset County Scout Association
- Somerset Youth – Youth Council
- Young Homeless Group
- Youth Council



## Appendix A – stakeholders to be involved in local planning policy

- Young Somerset
- YMCA

### **Disability groups:**

- Apple Disabled Sports Clubs
- Bridgewater & Taunton Deaf Club
- Conquest Centre for Disabled Riders
- Compass
- Disability Employees Network
- Learning Disabilities Service
- MENCAP
- MIND
- Sense
- Seeability
- Somerset Association for the Blind
- Somerset Access and Inclusion Network
- Somerset Tinnitus Support Group for hard of Hearing
- Taunton Deane Disability Discussion Group

### **Women and men's groups:**

- Association Women's Refuge
- Men's Advice Line and Enquiries (MALE)
- Standing Conference for Women's Organisations
- Women's Resource Centre

# Appendix A – stakeholders to be involved in local planning policy

## **Race, nationality and ethnicity groups:**

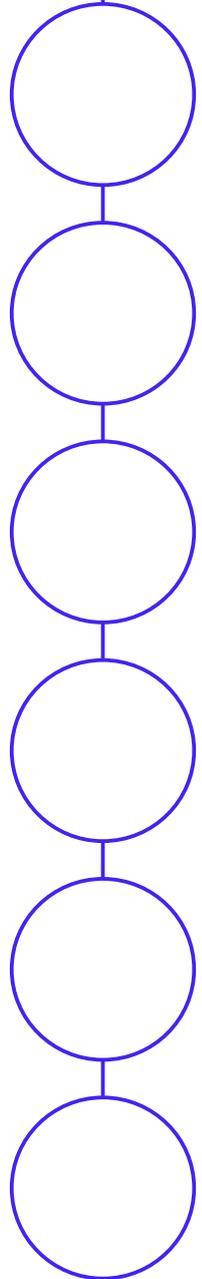
- Bangladesh Association Taunton and West Branch
- Black and Ethnic Employment Group
- Chinese Association
- Friends and Families of Gypsies and Travellers
- Polish Somerset
- Showmens Guild of Great Britain (Western Section)

## **Equalities groups:**

- Gay, Lesbian, Bisexual and Transgender (LGB&T) groups
- Forum for Equality and Diversity in Somerset (FEDS)
- Gay Community
- Jehovah’s Witness South West Region
- Somerset Racial Equalities Council
- Taunton Christians Together
- Taunton Townswomens Guild
- Taunton vale Gospel hall Trust
- Temple Methodist
- 2bu - Somerset
- World Forum for Ethnic Communities

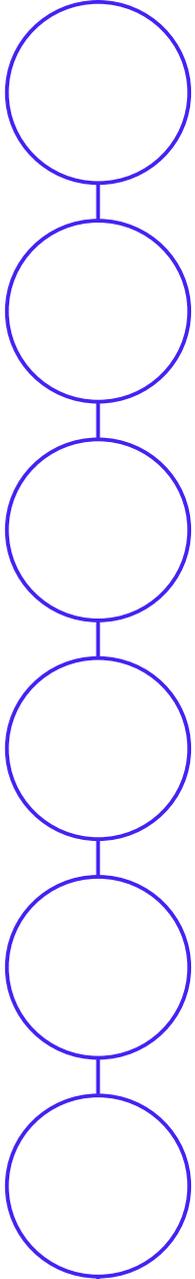
## **Other groups:**

- Alzheimer’s Society
- Avon & Somerset Independent Custody Visitors Scheme
- Citizen’s Advice Bureau
- CVS
- Motor Neurone Disease Association



## Appendix A – stakeholders to be involved in local planning policy

- MS Society Taunton and District Branch,
- Depression Alliance Somerset
- POhWER
- Somerset Association for the Care and Resettlement of Offenders
- Somerset Carers Network
- Relate – Taunton, Wiveliscombe and Wellington
- Haven



# Appendix B – stakeholders to be involved in development management

## Appendix B – stakeholders to be involved in development management

The Regulations<sup>(7)</sup> require the Council to consult specific consultation bodies when considering some planning applications.

The statutory consultees for Development Management include:

Local highway authorities

Local planning authorities

Natural England

Parish councils

Rail network operators

Regional development agencies

The British Waterways Board

The Coal Authority

The English Sports Council

The Environment Agency

The Health and Safety Executive

The Historic Buildings and Monuments Commission for England

The National Park authority

The Secretary of State for the Environment, Food and Rural Affairs

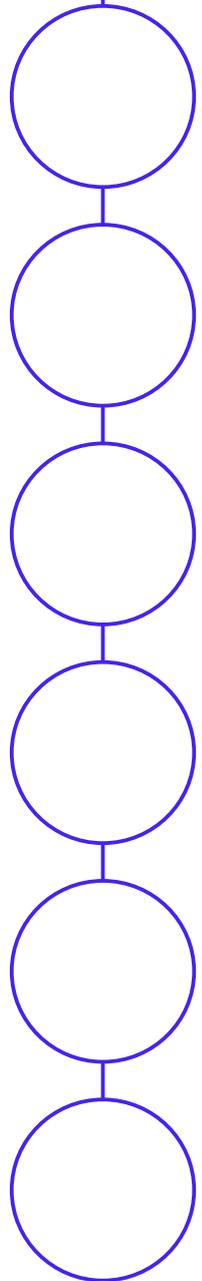
The Secretary of State for Transport

The Theatres Trust

The statutory consultees which need to be consulted vary depending on the type of application submitted, and the specific site circumstances. Therefore, the detailed table within Schedule 5 of The Town and Country Planning (Development Management Procedure) (England) Order 2010 should be referred to for more detailed information.

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7 Article 16 of The Town and Country Planning (Development Management Procedure) (England) Order 2010



# Appendix C - Definition of application type

## Appendix C - Definition of application type

Application type	Definition / details
Significant applications	<ul style="list-style-type: none"> <li>• 10 or more dwellings or where site is more than 0.5 hectares</li> <li>• All uses where floor space is more than 1,000m<sup>2</sup> or the site is more than 1 hectare</li> <li>• Applications are normally determined within 13 weeks</li> </ul>
Departure applications	<ul style="list-style-type: none"> <li>• Applications considered to be in breach of and/or may significantly compromise the delivery of Local Planning Policy - Core Strategy, Local Plan, Town Centre Area Action Plan and Site Allocations</li> <li>• Applications which must be submitted to DCLG for their consideration</li> </ul>
Small Scale applications	<ul style="list-style-type: none"> <li>• Less than 10 dwellings</li> <li>• For all other uses where floor space is less than 1,000m<sup>2</sup></li> <li>• Normally determined within 8 weeks</li> </ul>
Other minor applications	<ul style="list-style-type: none"> <li>• Normally determined within 8 weeks</li> <li>• Including:                             <ul style="list-style-type: none"> <li>○ Applications for advertising consent</li> <li>○ Applications for tree works</li> <li>○ Conservation Area Consent</li> <li>○ Listed Building Consent</li> <li>○ Householder applications</li> <li>○ Change of use for non-major developments where no building or engineering works are proposed</li> </ul> </li> </ul>

# Appendix D – glossary of Town and Planning terms

## Appendix D – glossary of Town and Planning terms

### Glossary of town planning terms and acronyms

This appendix is not an exhaustive anthology of all terminology used within the town and country planning process. It is a short, non-technical summary of terms and acronyms widely used in the preparation of development plans or in determining planning applications. More detailed and technical information from legally competent, authoritative and academic sources widely available in libraries and on the Internet.

**Adoption:** The formal adoption, by Council, of a local plan (cf) or Development Plan Document following public examination and receipt of a positive report from the Planning Inspectorate is the final formal stage in the evolution of a statutory planning document. Once a plan is adopted it has full legal weight in the determination of planning applications.

**Allocation:** Formal identification of a land parcel for a specific use through a development plan. Most commonly associated with housing allocations.

**Amenity:** A positive element, or elements, that contribute to the overall character or enjoyment of an area. For example, open land, trees, historic buildings and the inter-relationship between them, or less tangible factors such as tranquillity.

**Ancillary use:** Where a building or plot of land is in a variety of uses (as defined by the Use Classes Order), the principal use will be the defined use of the land in planning law terms. For example, a factory may have a storage building, offices, a staff restaurant and over-the-counter sales to the public. All of the other uses are ancillary to the predominant use of the factory falling within Use Class B2. If there is no one dominant use a mixed use will exist. Changes in the balance of uses in both instances may constitute a material change of use (cf) and, therefore, require planning permission.

**Authorities Monitoring Report (AMR):** This measures how the council is progressing with the timetable set out in the Local Development Scheme (cf). It also assesses the effectiveness of the various policies contained in the Development Plan Documents and monitors key indicators, such as house-building, employment land take-up, etc.... The Localism Act will remove the statutory requirement to produce this document.

**Appeal:** Within a set time of a planning application being determined, or if the Council has failed to determine the application within the statutory timeframe, an aggrieved applicant may ask for a decision to be (re)considered by the Planning Inspectorate. The appeal may be conducted (i) in writing, (ii) by an informal discussion led by the Inspector or (iii) by a formal public inquiry, with cross-examination of witnesses and perhaps barristers to present the respective parties' cases. The Planning Inspectorate decision is binding (but may be challenged by judicial review).

## Appendix D – glossary of Town and Planning terms

**Application form:** Each planning application must be accompanied by a formal application form. These forms follow a national standard and include the name and address of the applicant, the location of the development and details of the proposal. Must be accompanied by: a signed ownership certificate; a plan of the proposal at an appropriate and recognised scale; and usually by a variety of other information i.e. Design and Access Statement, an Environmental Impact Assessment, Ecological Surveys, Transport Assessments, etc.

**Approved plans:** A plan at a recognised scale that shows the development permitted by a grant of planning permission. Any significant variation in the built form from that shown on the approved plans may require a further planning application or may lead to enforcement action, which could include the demolition of the offending buildings or cessation of the aberrant use(s). See also 'Decision Notice'.

**Area Action Plan (AAP):** These provide the planning framework for areas where significant change or conservation is needed or anticipated. These plans have Ordnance Survey based maps, which will act as insets to the main proposals map. The Council has the Taunton Town Centre Area Action Plan (TTCAAP). AAPs will effectively cease to have statutory support once the related provisions of the Localism Act come into force.

**Biodiversity:** The 1992 United Nations Earth Summit defined biological diversity or biodiversity as "the variability among living organisms from all sources, including, 'inter alia', , , and other , and the ecological complexes of which they are part: this includes diversity within species, between species and of ecosystemsterrestrial, , and other , and the ecological complexes of which they are part: this includes diversity within species, between species and of ecosystemsmarine, and other , and the ecological complexes of which they are part: this includes diversity within species, between species and of ecosystemsaquatic ecosystems, and the ecological complexes of which they are part: this includes diversity within species, between species and of ecosystems". The term covers species diversity; ecosystem diversity; genetic diversity; and molecular diversity. Many industrial materials derive directly from biological sources. Biodiversity is also important to the security of resources such as water, timber, paper and food. As a result, biodiversity loss is considered to be a significant risk factor. Consequently, it is a pertinent consideration in planning matters. A Biodiversity Action Plan (BAP) for Taunton Deane was created in 2008.

**Blight:** The reduction, or perceived reduction, in value of a building or piece of land as the result of a planning decision.

**Brownfield land:** Land which has been previously developed. Often associated with urban land but equally relates to previously developed land in the countryside. May be contaminated by pollutants which require remediation before re-use and redevelopment occur.

**Building control/regulations:** An entirely separate and distinct regime from planning, with its own procedures, fees and decision-making process. Many forms of development do not require express planning permission but will require building control approval. The national Building Regulations ensure that buildings are safe,

## Appendix D – glossary of Town and Planning terms

fuel and energy efficient, reduce CO2 emissions and provide access for people with disabilities. Building Control exists in both public and private sectors (the latter being known as Approved Inspectors), with the two sectors competing for business. Local authorities are required to provide a Building Control service for use by the public.

Call-in: Some planning applications must be notified to the Secretary of State to give her/him the opportunity to 'call-in' an application for her/his own determination. The Secretary of State also has powers to call-in any application and may direct us to hand it over to them. The application is considered at a public inquiry by one or more members of the Planning Inspectorate (cf) who make recommendations to the Secretary of State, who decides whether or not to allow the application.

Capacity study: A study designed to identify what capacity or 'headroom' there is for a particular form of development. Uses population projections and other statistical data/assumptions to identify whether there is a gap between the current amount of provision and the level of provision projected as being necessary (usually at some point in the future). Most commonly associated with retail capacity studies, where a developer wants to show that there is the capacity for a new store that will not undermine existing stores. But see also 'Urban capacity study'.

Carbon emissions/footprint: See 'Greenhouse effect'.

Carbon neutral: Has a nil-net effect on carbon emissions. See also 'Greenhouse effect'.

Carbon offsetting/trading: A reduction in emissions of carbon dioxide or greenhouse gases made to compensate for, or to offset, an emission made elsewhere. There are two markets for carbon offsets. In the compliance market, companies, governments, or similar buy carbon offsets in order to comply with caps on the total amount of carbon dioxide they are allowed to emit. This market exists in order to achieve compliance with obligations under the Kyoto Protocol. In the voluntary market, individuals, companies, or governments purchase carbon offsets to mitigate their own greenhouse gas emissions. Offsets are typically achieved through financial support of projects that reduce the emission of greenhouse gases in the short- or long-term. The most common project is renewable energy, such as wind farms, biomass energy (burning biological material from living, or recently living organisms or solid municipal waste), or hydro-electric dams. Other examples include large-scale tree planting schemes in Third World countries.

Change of use: Planning permission is usually required to change the use of a building or land to another use class. Intensification of a use may constitute a change of use.

Climate change: See 'Greenhouse effect'.

Code for Sustainable Homes: A national standard for sustainable design and construction of new homes. It aims to reduce carbon emissions and promote higher standards of sustainable design above the minimal set out in the Building Regulations. The code awards new homes a star rating from 1 to 6, based on their performance against nine sustainability criteria which are combined to assess the overall

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environmental impact. Six stars are the highest achievable score, reflecting exemplary developments. Code level 3 compliance became mandatory in September 2010 for new-build residences, currently compliance with higher levels of the Code is voluntary.

**Community Infrastructure Levy (CIL):** A new means of securing planning obligations for Borough wide infrastructure projects through a flat rate levy. How the levy is calculated and apportioned to the various infrastructure projects is set out in publicly available documents on the Councils website. Individually negotiated Section 106 agreements will still be used across the Borough for on site items such as Affordable Housing and Children's Play.

**Comparison shopping:** Shopping for non-essential items, generally of a higher value (such as furniture and electrical goods) but also extends to clothing, books, cosmetics, etc. Comparison shopping has traditionally been conducted in town centres, but since the 1980s has also been carried out in retail [warehouse] parks and, most recently, on-line. See also: 'Convenience shopping' and 'Town centres first'.

**Compulsory Purchase Order (CPO):** An Order issued by the government, or a local authority, for the enforced acquisition of land or buildings for public interest purposes. For example, for the construction of a major road or the redevelopment of certain brownfield sites. The purchasing authority needs to be capable of demonstrating that they have tried to acquire the property by negotiation before a CPO can be issued. Most CPOs are preceded by a CPO Inquiry conducted by a member of the Planning Inspectorate, who will either confirm or reject the Order.

**Conditions:** Planning permission is usually granted subject to conditions, all of which must be complied with. Conditions should only be imposed when permission would otherwise have to be refused. It is the responsibility of the developer to ensure that the terms of all conditions are met.

**Conservation area:** A defined area, designated by a local council, which is to be preserved or enhanced because of its special architectural or historic interest. There are 41 conservation areas in Taunton Deane. A special planning regime operates in conservation areas.

**Conservation Area consent:** Alterations to buildings (including total or substantial demolition), advertising and trees cannot be undertaken in conservation areas (cf) without permission from the council. No planning fee is charged for such applications but pre-application discussions attract a flat fee.

**Convenience shopping:** Shopping for goods of an essential day-to-day nature, such as food, newspapers, tobacco, etc.

**Decision notice:** The official document, issued by the Local Planning Authority, Planning Inspectorate or the Secretary of State, that grants or refuses planning permission. Development may not legally begin before the decision notice has been issued. Reasons for permitting or refusing development, and for any conditions

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imposed on a permission, are always given. In conjunction with the approved plans, this is the definitive statement of the development that has been granted or refused permission.

**Delegation/delegated decision:** Decisions on planning applications where officers make decisions rather than an elected planning committee. The overwhelming majority of decisions are made in this way, provided that there are no complex issues, or the proposal is wholly acceptable in planning terms. It is also used for refusal when an application is clearly not in accordance with planning policies or practice.

**Demolition:** Requires planning permission only in certain circumstances (such as homes), but planning permission is normally required to rebuild on the site. Demolition of listed buildings requires Listed Building Consent and special provisions apply in conservation areas.

**Density:** In the case of residential development, a measurement of either the number of habitable rooms (any room used or intended to be used for sleeping, cooking, living or eating purposes i.e. not bathrooms, hallways, utility rooms) per hectare or the number of dwellings per hectare [dph].

**Department for Communities and Local Government (DCLG):** Government department responsible for, inter alia, preparing primary and secondary legislation on town planning and for preparing guidance to direct and assist in the day-to-day interpretation and operation of the statutory town planning system, such as the National Planning Policy Framework. Also determines called-in or recovered planning applications.

**Departure:** A proposed development that is not in accordance with the adopted development plan, but for which the Local Planning Authority proposes to grant planning permission subject to no intervention from the government.

**Design & Access Statement:** Prepared by applicants for planning permission. Describes the development and explains how the design was arrived at, what local planning policies have been observed, how any public engagement has been reflected in the design, and how relevant principles of good design have contributed to the proposal. This document enables the lay public to understand how the finished proposal was arrived at, and acts as a check upon the quality of the decision-making process which led to that proposal by the developer concerned.

**Detailed application/'Details':** A planning application seeking full permission for a development proposal, with no matters reserved for later planning approval. **Antithesis:** outline application development: Defined in the 1990 Act as "the carrying out of building, engineering, mining or other operations in, on, over or under land" (known as operational development) or "the making of any material change of use of any buildings or other land". Not all development requires planning permission - see 'Permitted development'.

**Development Brief:** See 'Masterplan'.

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**Development Management:** The new name for development control. The act of determining planning applications (and similar) in conformity with the development plan and material considerations.

**Development Plan Document (DPD):** Statutory documents produced by LPAs that must be taken into account in determining planning applications. Currently, planning permission must be granted in accordance with these documents unless material considerations indicate otherwise. Development Plan Documents must be subjected to examination by a member of the Planning Inspectorate before being adopted. The Core Strategy is the principal DPD under the 2004 Act, Site Allocations and Development Management DPD's providing additional details. Under the Localism Act these documents will be combined into a single Local Plan.

**Ecology:** The scientific study of the relations that living organisms have with respect to each other and their natural environment. Variables of interest to ecologists include the composition, distribution, amount (biomass), number, and changing states of organisms within and among ecosystems.

**Ecosystems:** Ecosystems are functional units in a given area consisting of: (i) living things, (ii) the non-living chemical and (iii) physical factors of their environment, all linked together through (iv) the nutrient cycle and by (v) energy flows. Central to the ecosystem concept is the idea that living organisms interact with every other element in their local environment. Ecosystems are sustained by the biodiversity within them. Because the impact of development on ecosystems and biodiversity can be unpredictable, even when assessed through an Environmental Impact Assessment, many people advocate the use of the precautionary principle when determining planning applications.

**Edge of centre:** A location that is within easy walking distance of the primary shopping area.

**Enabling development:** Development that is usually contrary to established planning policies but which is exceptionally permitted because it has been demonstrated to be necessary to generate funds to enable the conservation of a Listed Building or its setting and where the indirect benefit of the enabling development clearly outweighs any direct harm that it would cause.

**Enforcement:** The investigation and resolution of alleged breaches in planning control, usually undertaking development without permission or failing to observe conditions. An otherwise acceptable breach of planning control can be corrected by a retrospective planning application. Formal enforcement action, which could include issuing of an Enforcement Notice to require the demolition of any offending buildings/structures or cessation of any aberrant use, may only be undertaken if the development would not be permitted and it is considered "expedient" to take action. Can ultimately lead to action in the County Court against the defaulting party if negotiation and service of an Enforcement Notice fails to remedy the breach of planning control.

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**English Heritage:** National Body responsible for overseeing the historic built environment of England, advising local authorities on such matters and acting on behalf of the government (the Department for Culture, Media and Sport) in matters such as registering listed buildings.

**Environment Agency (EA):** National Body, established in 1973, to protect and improve the environment and to promote sustainable development. Has a particular focus on climate change, water, land and air quality. Has roles as a regulator, operator, monitor and advisor. A key consultee.

**Environmental Impact Assessment (EIA):** Likely to be required for nationally defined large-scale developments. Undertaken by the developer when applying for planning permission, the EIA assesses the social, economic and environmental impacts of the development and identifies what remedial measures may be necessary to counter any negative impacts. Used as an informative to decision-making rather than a determinant of whether permission should be granted.

**Environmental Information Regulations 2005 (EIR):** Provide a statutory right of access to environmental information held by public authorities. Covers information about air, water, soil, land, flora and fauna, energy, noise, waste, emissions and information about decisions, policies and activities that affect the environment.

**Examination:** See 'Public examination'.

**Fee:** Nationally set fees are required for a planning application to be determined. Locally-set fees are payable for pre-application discussions and advice. In both cases, the fees vary depending upon the scale and nature of the development being proposed. The fee income is kept by the Borough Council and offset against the costs of providing the planning service. There are limited exemptions from paying planning application fees, including householder applications by registered disabled persons.

**Fossil fuels:** Carbon-rich fuel (coal, oil and natural gas) formed from the remains of ancient animals and plants. Their combustion is considered to contribute to the 'greenhouse effect'.

**Freedom of Information (Fol) request:** The Freedom of Information Act 2000 creates a general right of access, on request, to information held by public authorities. On receipt of a freedom of information claim a public authority has two corresponding duties. First, a duty to inform a member of the public whether or not it holds the information requested, and second if it does hold that information, to communicate it to the person making that request. However, there are numerous exemptions. Some of these are absolute bars to disclosure; some are qualified. Most planning information is covered by the Environmental Information Regulations, rather than Fol.

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**General Permitted Development Order (GPDO):** The Town and Country Planning (General Permitted Development) Order 1995 allows for the extension of, or changes to, a property without the need for express planning permission, within certain guidelines. This includes small domestic extensions which comply with pre-determined measurements.

**Grampian-type condition:** A negative condition imposed on a planning permission barring development from happening until a particular action on another piece of land not owned by the applicant has been performed (usually highways works). Named after a court case involving Grampian Regional Council in 1984.

**Green Belt:** Green Belts are specifically designated areas to prevent urban sprawl by keeping land permanently open. In the green belt there is a general presumption against inappropriate development, unless very special circumstances can be demonstrated to show that the benefits of the development will outweigh the harm caused to the green belt. The NPPF sets out what would constitute appropriate development in the green belt. There is no Green Belt land in the Borough of Taunton Deane.

**Greenfield land:** Land which has not previously been developed (hence antithesis: brownfield land). Most commonly associated with land in the countryside but could equally apply to an undeveloped site within an urban area.

**Greenhouse effect:** A process by which thermal radiation from Earth's surface is absorbed by atmospheric greenhouse gases, and is re-radiated in all directions, including back towards the surface. As a result, the surface temperature is higher than it would be if direct heating by solar radiation were the only warming mechanism. Since the beginning of the Industrial Revolution, the burning of fossil fuels (wood, coal, gas, oil) has contributed to the increase in carbon dioxide in the atmosphere from 280ppm to 390ppm. If this process continues, many ecosystems will be damaged and become uninhabitable for Mankind. As a part of sustainable development there is a current drive towards reducing carbon emissions. Hence terms such as "reducing the carbon footprint" and "zero carbon homes".

**Highways Agency:** National Body responsible for operating, maintaining and improving England's motorways and strategic A roads on behalf of the Department for Transport. The HA is responsible for the M5 and A303 in the Borough. A statutory consultee on planning applications and in the preparation of DPDs.

**Highways Authority:** The county council are the Highway Authority for Somerset. They are charged with the statutory responsibility of adopting, maintaining, designing, making safe and constructing all roads, footways and public rights of way which are not the responsibility of the Highways Agency (see above). A major consultee on planning applications and in the preparation of DPDs.

**Homes and Communities Agency (HCA):** National Body that is the national housing and regeneration agency. Founded in December 2008, superseding English Partnerships and the Housing Corporation. Its role is to create opportunity for people

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to live in high quality, sustainable places. They provide funding for affordable housing, bring land back into productive use and improve quality of life by raising standards for the physical and social environment.

Householder application: A, generally smaller-scale, application to alter or enlarge a house, including works within the garden of a house which are not permitted development. Nationally these form the majority (60%) of the applications received by LPAs.

Infrastructure deficit: Infrastructure is the basic physical and organizational structures needed for the operation of a society. The term typically refers to the technical structures such as roads, water supply, sewers, gas and electrical grids, telecommunications, etc. Hence, if it is perceived that there is a shortfall in the infrastructure provision, there is said to be an infrastructure deficit. The TDBC Infrastructure Delivery Plan identified the scale and nature of the infrastructure required to meet the Boroughs Growth and the level and nature of the investment needed to deliver this.

Inquiry: See 'Appeal'.

Judicial Review (JR): A challenge to the High Court by any aggrieved and affected party against a decision made by, for instance, the council, the Planning Inspectorate or the Secretary of State. Can only be made on points of law (viz, not planning judgments) and must be made "expeditiously" after the decision to be challenged has been made. This means that applications for JR must be made within 3 months, at most.

Landbank: A stock of land (for housing, for example) which has planning permission but has yet to be developed. Housebuilders commonly have considerable landbanks, which bolster their value on the Stock Exchange.

Lawful Development Certificate (LDC): A specialist type of application that determines: (i) whether the existing use of land or buildings is lawful for planning purposes or (ii) confirms that a proposal does not require express planning permission. Often necessary to confirm that the use, operation or activity named in it is lawful when land or property is placed on the market for sale. A fee is charged for an LDC. Is not the same as a planning permission. Sometimes used in enforcement cases.

Listed Building: A building or structure on the Statutory List of Buildings of Special Architectural or Historic Interest run by English Heritage. Listing began in 1950 and currently protects 500,000 across England and Wales. By reason of their significance, Listed Buildings fall into three categories of descending importance: Grade I, Grade II\* and Grade II, of which the majority - over 90% - are Grade II. A listed building may not be demolished, extended or altered without permission from the local planning authority. No fee is charged for such Listed Building Consent but a flat fee is charged for pre-application discussions. Enabling development may be contemplated in order to secure the preservation of a Listed Building.

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**Local Development Framework (LDF):** The collective terms given to a collection of planning and plan related documents, prepared by LPAs.

**Local Development Scheme (LDS):** This document sets out which documents are part of the Local Development Framework and the timetable for their review and the preparation of new documents. This is a statutory document.

**Local Plan:** A document produced under the pre-2004 planning system that set out all the council's policies on the development and change of use of land and buildings. The Localism Act has reintroduced the term to the planning system, replacing the separate tiered documents of Core Strategy, Site Allocations, Development Management Plan, etc introduced in 2004.

**Local Planning Authority (LPA):** A local authority charged by central Government with the statutory duty to prepare development plan documents and undertake other duties under the Planning Acts. District Councils, sometimes styled as Borough or City Councils, have planning powers for all development in their administrative areas with the exceptions of minerals and waste. County Councils have planning powers for minerals and waste proposals within their administrative areas.

**Localism Act:** Contains many changes to the planning system, including the revocation of regional strategies, the return of local plans and the introduction of neighbourhood plans. Enacted 15 November 2011.

**Major application:** Involves any one or more of the following: (i) mineral deposits; (ii) waste development; (iii) a site for 10 or more new homes or where the site area for new homes is 0.5ha or more; (iv) the provision of a building or buildings where the floorspace to be created is 1,000m<sup>2</sup> or more; or (v) any other development carried out on a site with an area of 1 hectare or more.

**Masterplan:** A widely used and abused term. Usually applied to a comprehensive written and/or cartographic representation of a potential development scheme. Sometimes a masterplan may be SPD or it may be submitted with a planning application. Alternatively, land-owners or developers often prepare masterplans to guide their own, or other party's, development. It is always best to inquire as to the status and intent of a masterplan in order to ascertain how much weight to place upon it.

**Material considerations:** Factors considered in the determination of applications for planning permission, alongside the statutory development plan. Includes residential amenity, highway safety, traffic, noise, smell, design and appearance, conservation and listed buildings and any relevant planning comments made by consultees. In order to be material a consideration must relate to the use and development of land and to the planning merits of the development in question. Non-planning comments and the number of objections received are not material considerations. What is considered to be material may be subject to appeal and/or judicial review but the weight to be attached to a material consideration is solely for the decision-maker and will not be challenged by the courts.

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**Minerals Local Plan/LDF:** A statutory long-term development plan framework for mineral extraction and associated development (such as railheads and storage facilities). Covers oil, coal, gas, sand, gravel, crushed rock and chalk. All minerals planning powers (plan-preparation and development management) reside with county council in Somerset.

**National Land Use Database (NLUD):** National database, compiled annually as a government initiative from various public sources (including local authorities), to provide information on the amount of brownfield land (cf) that may be available for development.

**National Planning Policy Framework (NPPF):** From 1 April 2012 this 50 page document will replace 2,000+ pages of national government policy, advice and guidance contained in Planning Policy Statements and Planning Policy Guidance Notes and their annexes. Until up-to-date local plans [or LDFs] are put in place, planning applications must be determined in accordance with the presumption in favour of sustainable development contained within the NPPF.

**Natural England:** National Body responsible for ensuring that England's natural environment, including its land, flora and fauna, freshwater and marine environments, geology and soils, are protected and improved.

**Neighbourhood plans:** Introduced under the planning provisions of the Localism Act. Parish Councils (or authorised groups of local individuals in unparished areas) are able to prepare statutory development plans against which planning applications will have to be assessed. These Plans must be in general conformity with the strategic policies of the local plan. After public examination, if found sound must be subject to a local referendum before being adopted by the LPA.

**Net migration:** Takes into account natural change in the population (births and deaths) and also those people who have moved into, and out of, the locality. Stevenage has seen net out migration in recent years as more people have moved out of the town than have moved into it: this is unusual as one would normally expect in-migrants to exceed out-migrants. A well accepted population projection model. See also: 'Nil-net migration' and 'Population projections'.

**Nil-net migration:** Takes into account natural change in the population (births and deaths) but not those people who have moved into, and out of, the locality. In this model in-migrants are mathematically forced to equal out-migrants. A controversial basis for population projection modelling. See also: 'Net migration' and 'Population projections'.

**Non-determination:** If the council fails to make a decision on a planning application within the set time, the applicant may appeal to the Planning Inspectorate who then make the decision, rather than the council.

**Objections:** Representations received by the Local Planning Authority or any other determining body in respect of either a planning application or a development plan which opposes all or part of the proposals. In order for the objections to be considered

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and given weight they must raise legitimate planning matters (see 'Material considerations'). The number of objections received is not a legitimate ground for refusing planning permission.

**Off-setting:** Where the negative impact of a development or activity in one location is off-set or traded against a positive impact or activity implemented elsewhere, usually to obtain a nil-net effect. Most widely used in carbon trading (cf) but now spreading to the fields of biodiversity and ecology more generally.

**Outline application:** An application for planning permission primarily designed to establish that a development is acceptable in principle, subject to subsequent approval of detailed matters. Usually applies to major developments where it is either uncertain whether the proposal is in conformity with the development plan or where the scale of the development is such that it is inappropriate to be exact in every detail at the time of applying for planning permission.

**Out of centre:** In retailing terms, a location that is clearly separate from the primary shopping area of a town centre but not outside the urban area.

**Out of town:** In retailing terms, a location clearly outside the current urban boundary.

**Overbearing:** A term used to describe the impact of a development or building on its surroundings, particularly a neighbouring property, in terms of its scale, massing and general dominating effect.

**Over-development:** An often pejorative term describing an amount of development (for example, the quantity of buildings or intensity of use) that is considered excessive in terms of demands on infrastructure and services, or impact on local amenity and character.

**Overlooking:** A term used to describe the effect when a development or building affords an outlook over adjoining land or property, often causing loss of privacy.

**Overshadowing:** The effect of a development or building on the amount of natural light presently enjoyed by a neighbouring property, resulting in a shadow being cast over that neighbouring property.

**Performance targets:** Local Planning Authorities have nationally set performance targets to meet, principally revolving around the time taken to determine different types of planning applications. These were originally set as Best Value Performance targets.

**Permitted development:** Building works and uses as defined by the General Permitted Development Order and Use Classes Order that can be undertaken without the need for express planning permission from the local planning authority.

**Planning Acts:** The first Planning Act was in 1909 but the modern planning system was introduced by the Town and Country Planning Act of 1947. There have been a series of further Acts over the succeeding years, with the main ones in use today being the four 1990 Acts, the Planning and Compulsory Purchase Acts of 1991 and

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2004 and the Planning Act of 2008. To these will be added the planning provisions of the Localism Act (which may not be commenced). Supplementing the Acts are various circulars, statutory instruments (such as the Development Plans (England) Regulations), guidance notes, policy statements, ministerial announcements and, from 1 April 2012, the National Planning Policy Framework.

**Planning Advisory Service (PAS):** A part of the LG Group that advises Local Planning Authorities how to improve their planning service. Includes peer review, best practice notes, etc.

**Planning Aid:** A government-subsidised service, offered by the RTPI, that provides free and independent advice and support to community groups and individuals unable to afford to employ a planning consultant.

**Planning application:** A planning application is necessary in order to secure express planning permission from the relevant Local Planning Authority for development that is not otherwise permitted development. See also 'Application form'.

**Planning for Real:** A term broadly, and inappropriately, used to refer to any consultation method involving creative exercises (for example, the use of maps and model buildings) to engage the public in plan-making and place-shaping. The term is commercially copyrighted and licensed: it should not be confused with similar consultation methodologies not provided by the copyrighted owners of the term.

**Planning obligations:** Securing the delivery of community benefits by legal agreement following negotiation with applicants for planning permission, without which any development would be unacceptable. May include the physical construction of facilities, the provision of land or the payment of a fee in lieu of on-site provision. The building of affordable housing and the provision of new children's play are examples. Also known as Section 106 agreements. May not be used to remedy existing infrastructure deficiencies: may only be used to meet the needs generated by the development being permitted. To be largely replaced by the Community Infrastructure Levy (cf).

**Planning Inspectorate (PINS):** National Body that undertakes planning and enforcement appeals (usually against Local Planning Authority refusal of permission or non-determination of planning applications). As of 2012 it also determines nationally important infrastructure projects. Holds evidence-gathering, quasi-judicial examinations into both planning applications and local plans and DPDs. PINS decisions on planning applications are binding on all parties except Government, but all of its decisions may be overturned by the courts on limited technical grounds following judicial review.

**Planning Officers' Society (POS):** Body that represents senior professionals and managers of planning functions in the public sector serving the English Local Planning Authorities (cf). Provides advice, best practice and training opportunities.

**Planning permission:** The consent given by the local planning authority, the Planning Inspectorate or the Secretary of State for development. Usually given with conditions and with a time limit for the beginning of development. May be subject to planning

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obligations. Reasons for permission will be given on the decision notice. Will be closely based on the information given in the planning application form and the ancillary information supplied by the applicant.

Planning Policy Statements (PPS) and Planning Policy Guidance Notes (PPGs): Prepared by Department of Communities and Local Government arm of Government. Designed to set national planning policy, explain the Planning Acts and to provide national guidance on the intended interpretation of planning policies. LPAs must take their content into account when preparing DPDs and determining planning applications. PPGs began to be issued in 1988; and started to be superseded by PPS' from 2004. The National Planning Policy Framework purported to replace PPS' and PPGs in 2012. Government have subsequently issued guidance on the NPPF.

Planning Portal: A Government sponsored web-site from which much useful generic information about the statutory town and country planning and building control systems can be gathered. Most LPAs are connected to the Planning Portal via hyperlink, such that it acts as a 'one stop shop' for developers and the public wishing to gain access to the planning pages of their local authority's web-site. Many local authorities, including the Borough Council, offer electronic submission of planning applications and the payment of fees via the Planning Portal.

Population projections: The principal basis of determining the future development needs of an area when preparing a development plan. A number of different models of population projection are available, including net-migration and nil-net migration. Alternatives to population-based projections are economic-derived models, although these are less widely used, projecting past performance, assessing affordable housing needs and policy-led models (in which planning policy constraints are overlaid, generally to constrain the housing requirement). The antithesis of using population projections or other demand-led projections as a basis for determining development levels is the urban capacity model.

Pre-application discussions/fees: An opportunity for councils and developers to work together to achieve developments that deliver benefits to the community and the economy. These discussions are provided for a fee, for officer time, but in the long-term they can save time, costs and frustration and optimise the potential of a site.

Precautionary principle: If an action or policy has a suspected risk of causing harm to the public or to the environment, in the absence of a scientific consensus that the action or policy is harmful, the burden of proof that it is not harmful falls on those taking the action. The principle implies that there is a responsibility to protect the public from exposure to harm when scientific investigation has found a credible risk. These protections can be relaxed only if further scientific findings emerge that provide sound evidence that no harm will result. Underpins much EU environmental policy but the application of the precautionary principle is not enshrined in UK planning law.

Presumption in favour of (sustainable) development: The Planning Acts have included a presumption in favour of development since 1947, as this was part of the post-war 'quid pro quo' that saw land and property owners' rights to develop their property as

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they wished nationalised without compensation. The presumption was amended to include the term 'sustainable development' following the work of the UN's Brundtland Commission.

Previously Developed Land (PDL): See 'Brownfield land'.

Primary Shopping Area (or Primary Shopping Frontage): A designated area where the number of Use Class A1 shops is most concentrated in a town centre. Beyond the primary shopping area will lie secondary and tertiary shopping areas, where shop uses become more diluted by other A-use classes (such as pubs, restaurants, banks) and other town-centre type uses (such as assembly and leisure uses).

Prior Approval: A procedure where permission is deemed granted if the Local Planning Authority does not respond to the developer's application within a certain time. Often relating to telecommunication or agricultural developments. Public examination: An interrogatory process led by one or more members of the Planning Inspectorate, held to examine the soundness of a DPD. Similar to an informal hearing: see 'Appeal'.

Public [local] inquiry (PLI): See 'Appeal'.

Refusal of planning permission: The guiding principle in determining planning applications is that development should be permitted, having regard to the development plan and all other material considerations, unless the proposed development will "cause demonstrable harm to interests of acknowledged importance". The person making the decision will issue a decision notice detailing the reasons for refusal. Within a set time, aggrieved applicants have the right to appeal against the refusal of planning permission.

Regional Strategy (RS): This is the successor to both the non-statutory Regional Planning Guidance and to the statutory Structure Plan. It sets the strategic context for development across the region, including setting the level of new housing to be accommodated. The South West Regional Spatial Strategy set a regional planning context for the South West. It was revoked under the Localism Act and ceases to have any relevance in planning.

Retrospective planning application: Occasionally a Local Planning Authority may receive, or in some enforcement cases encourage, those parties that have undertaken unauthorised development to submit a planning application to regularise the situation. Attempting to sell land or buildings upon which unauthorised development has occurred can lengthen the process and reduce the price received.

Royal Town Planning Institute (RTPI): Professional body representing town and country planners. Members of the RTPI must have a qualification recognised by the body and suitable post-qualification practical experience. Members are required to continually update their professional knowledge and skills by undertaking (and keeping a record of) Continuing Professional Development throughout their careers.

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**Saved policies:** Policies within a development plan that the Secretary of State has allowed to continue to have legal force, following passage of the 2004 Act, during the production of replacement Development Plan Documents. The non-saved policies – which replicated national and regional policies in force at December 2007 - are no longer in use.

**Secretary of State:** Head of the government's Department for Communities and Local Government or another government department.

**Section 106 agreements:** See 'Planning gain/obligations'.

**Sequential test:** The process of demonstrating that development is to occur on the most preferable location for the appropriate use. Most commonly associated with the 'town centres first' policy and the 'brown before green' test for housing development (wherein brownfield sites have to be used before greenfield ones).

**Site Notice:** Statutory notice posted on, or close to, a development site for at least 21 days, providing public notice of the existence of a planning application on the site. Usually accompanied by the publication of the same notice in a newspaper circulating in the locality.

**Soundness, tests of:** At a public examination held by one or more members of the Planning Inspectorate, local plans are checked against four tests of soundness - whether they have been positively prepared, are justified, effective and consistent with national policy - and whether the plan has been prepared in accordance with the duty to co-operate, legal and procedural requirements. Neighbourhood plans will be tested against fewer tests. These criteria are established in the National Planning Policy Framework.

**Statement of Community Involvement (SCI):** This sets out the council's policy on involving the community in policy-making and major planning applications.

**Stop Notice:** Notice served by an LPA on a land-owner where there is a breach of planning control that requires to be stopped. Serving a stop notice must follow an enforcement notice. Does not come into force for three days and gives reasons why the stop notice is necessary.

**Strategic Environmental Assessment (SEA):** Required to be prepared for plans and policies under the terms of the European directive 2001/42/EC for "environmental assessment of certain plans and programmes". Undertaken in conjunction with the Sustainability Appraisal. All but the least important of planning documents now have to be subject to SA/SEA.

**Strategic Flood Risk Assessment(SFRA):** Study to provide a reference and policy document to inform the local plan; and to ensure that the Council meets its legal obligation to keep new development (especially housing) from being built in areas of (serious) flood risk.

## Appendix D – glossary of Town and Planning terms

**Strategic Housing Land Availability Assessment (SHLAA):** Study to determine the availability and viability of possible future housing sites. Usually undertaken every year.

**Strategic Housing Market Assessment (SHMA):** Study to provide evidence on the types of housing that are needed to meet current and future demand. Used to inform both the local plan and development management decisions. Usually undertaken every 2-3 years.

**Structure Plan:** Documents produced by County Councils under the planning system pre-2004. Superseded by Regional Strategies. The few remaining residual policies of the Structure Plan 1998 were revoked under provisions of the Localism Act.

**Sui generis use:** A use in, and of, itself not falling within any Use Class (cf). Any change of use requires express planning permission.

**Supplementary Planning Document (SPD):** There is no legal requirement to take these documents into account in determining planning applications, so their nature is to provide guidance to applicants wishing to develop land. The community will be involved in their preparation, but there is no independent examination of the document. Under the NPPF councils are discouraged from producing SPD unless it will speed up the development process and not add to the costs of development.

**Sustainability Appraisal (SA):** An assessment of the impact the proposals contained within a DPD would have on the environment, economy and society. It is carried out in conjunction with the Strategic Environmental Assessment.

**Sustainable Development:** Although there are several definitions in use, the one most widely applied in planning is the definition of the Brundtland Commission "Our Common Future", the United Nations World Commission on Environment and Development, published in 1987. This states that sustainable development is "development that meets the needs of the present without compromising the ability of future generations to meet their own needs." This continues to appear in the National Planning Policy Framework.

**Temporary Stop Notice:** Served by an LPA on a landowner where a breach of planning control needs to be stopped immediately. Lasts for 28 days, during which the LPA must decide whether to issue an Enforcement Notice. Must specify the activity to be halted. See also 'Stop Notice'.

**Third party rights of appeal:** The right of an aggrieved party, other than the applicant, to appeal to an independent body against the grant of planning permission by a Local Planning Authority). There are third party rights of appeal in Eire but not in the UK. A judicial review of the decision (which could see the permission over-turned) or a complaint to the Local Government Ombudsman on the grounds of maladministration (which would not see the decision over-turned) are the usual means open to an aggrieved third party in the UK.

## Appendix D – glossary of Town and Planning terms

**Town and Country Planning Association (TCPA):** Founded by Sir Ebenezer Howard in 1899 to promote the idea of the Garden City, the TCPA is Britain's oldest charity concerned with planning, housing and the environment. Now a limited company with corporate and individual membership, it campaigns for the reform of the UK's planning system to make it more responsive to people's needs and aspirations and to promote sustainable development.

**'Town centres first':** A sequential locational test that developers and LPAs have to demonstrate has been followed in the placing of new shopping, leisure and office developments. The preferred order in the sequential test is: town centre; edge of centre; out of centre; out of town. Only if it can be clearly demonstrated that the development cannot be placed in a location higher in the preferential scale can the development be placed in a less favoured location lower in the hierarchy.

**Tree Preservation Order (TPO):** A means of securing the preservation of a single or a group of trees of acknowledged amenity value. A tree subject to a Tree Preservation Order may not normally be topped, lopped or felled without the consent of the Local Planning Authority. Trees on publicly owned land are not usually subject to TPOs as LPAs are considered to exercise good land husbandry.

**Ultra vires:** A Latin term meaning an action (usually of a Local Planning Authority, the Planning Inspectorate or the Secretary of State) which it is outside the legal power of the decision-maker to take. In planning, usually refers either to the issuing of a permission or the imposition of one or more conditions. Whether something is ultra vires will be determined by the courts through a judicial review.

**Unauthorised development:** Development that requires planning permission but which does not have it. Once unauthorised development comes to the attention of the Local Planning Authority an enforcement investigation will be begun. Unauthorised development can be regularised by a retrospective planning application in some instances or it may be beyond the time limits for enforcement action (four years for operational development or ten years for a change of use or breach of a planning condition). A Lawful Development Certificate is sometimes applied for to regularise the situation.

**Use Classes [Order]:** Government statutory instrument that sets out broad classes of similar uses. Currently there are 15 different use classes. Within each class, planning permission is not required to change from one use to another e.g. changing from a butcher's shop to an internet café does not require planning permission as both fall within the same use class (A1 - shops). There are also certain changes of use from one class to another that do not require planning permission e.g. from a pub (class A4) to a shop (class A1).

**Validation:** The initial process carried out by the Local Planning Authority upon receipt of a planning application. Checks are undertaken to ensure that all of the necessary information has been supplied with the application form and that the appropriate planning application fee has been paid. Only once this process has been completed will: an application be registered as valid; be given a unique reference number;

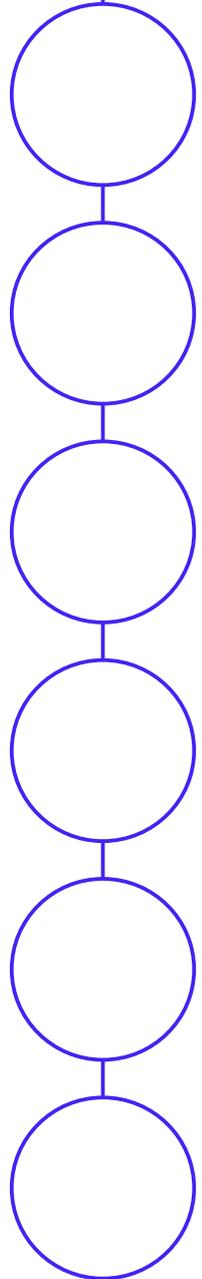
## Appendix D – glossary of Town and Planning terms

allocated to a specific planning officer (known as the case officer) to process and determine; and be added on to the weekly list. The necessary consultation letters will be sent out only after validation is completed.

**Waste Local Plan/LDF:** A statutory long-term development plan framework for managing and disposing of waste. All waste planning powers reside with county or unitary councils (i.e. not with district councils) - both plan-preparation and development management.

**Weekly list:** A compendium of all new valid planning applications received by the Local Planning Authority in the preceding seven days. Gives limited details including the application reference number, the address of the development, a brief description of the proposals and the name of the case officer. Available to view free of charge or to purchase.

**Weight:** The weight to be attached to an issue in the determination of a planning application is a matter for the decision-maker and will not usually be challenged by the courts. See also 'Material considerations'.



**15/01/2014, Report:Council Tax Base 2014/2015**

Reporting Officers:Paul Fitzgerald

**15/01/2014, Report:Business Rates Retention - NNDR 1 2014/2015**

Reporting Officers:Paul Fitzgerald

**15/01/2014, Report:Affordable Housing Supplementary Planning Document**

Reporting Officers:Jo Humble

**15/01/2014, Report:Taunton Town Centre Re-think - Final Proposals from Independent Consultants**

Reporting Officers:Brendan Cleere

**15/01/2014, Report:Report on Growth Prospectus for Taunton**

Reporting Officers:Brendan Cleere

**15/01/2014, Report:Housing Revenue Account Business Plan Review**

Reporting Officers:James Barra

**16/04/2014, Report:Review of the Statement of Community Involvement**

Reporting Officers:Ann Rhodes

**08/10/2014, Report:Smoke Free Zone Pilot**

**05/02/2015, Report:Capital Programme 2015/2016**

Reporting Officers:Steve Plenty

**05/02/2015, Report:General Fund Revenue Budget 2015/2016**

Reporting Officers:Steve Plenty

**05/02/2015, Report:Housing Revenue Account Estimates 2015/2016**

Reporting Officers:Steve Plenty

**05/02/2015, Report:Relocation of TIC to the Market House – request for funding**

Reporting Officers:Ian Timms

**05/02/2015, Report:Somerset Waste Board Business Plan**

Reporting Officers:Chris Hall

**05/02/2015, Report:Support and Funding for the Arts and Creative Industries - CICCIC**

Reporting Officers:Ian Timms

**11/02/2015, Report:Creation of the Somerset Building Control Partnership**

Reporting Officers:Chris Hall

**11/03/2015, Report:Discretionary Reduction in Council Tax Liability Policy and Discretionary Housing Payment Policy**

Reporting Officers:Dean Emery

**11/03/2015, Report: Establishment of the Somerset Growth Board**

Reporting Officers: Dan Webb

**11/03/2015, Report: Creation of the Somerset Building Control Partnership**

Reporting Officers: Chris Hall

**11/03/2015, Report: Funding request from Creative Innovation Centre Community Interest Company (CICCIC)**

Reporting Officers: Ian Timms

**22/04/2015, Report: Universal Credit and Local Support**

Reporting Officers: Mark Antonelli

**10/06/2015, Report: Deane DLO Relocation**

Reporting Officers: Chris Hall

Contains exempt information requiring private consideration: Yes

Exempt reason: Some of the information contained in the report is likely to be of a confidential nature.

**08/07/2015, Report: Q4 Performance Report**

Reporting Officers: Paul Harding

**08/07/2015, Report: Proposed Compulsory Purchase Action - Land at Monkton Heathfield**

Reporting Officers: Julie Moore

Contains exempt information requiring private consideration: Yes

Exempt reason: The report is likely to contain confidential information.

**08/07/2015, Report: Financial Outturn Report**

Reporting Officers: Paul Fitzgerald

**09/09/2015, Report: Write Off Report**

Reporting Officers: Steve Read

**09/09/2015, Report: Firepool Land Assembly - Confidential**

Reporting Officers: Tom Gillham

Contains exempt information requiring private consideration: Yes

Exempt reason: The report will contain confidential information relating to land-holdings and other related material.

**09/09/2015, Report: Citizens Advice Bureau Constructions Skills**

Reporting Officers: Matt Parr

**09/09/2015, Report: Proposed Apprentice Post in Housing and Communities**

Reporting Officers: Martin Price

**03/12/2015, Report: Council Tax Support Scheme 2016/17**

Reporting Officers: Heather Tiso

**03/12/2015, Report: Proposed Sheltered Housing Service Model Report**

Reporting Officers:Gary Kingman,Stephen Boland

**03/12/2015, Report:Fees and Charges 2016/2017**

Reporting Officers:Steve Plenty

**03/12/2015, Report:Local Development Orders – Progress Report**

Reporting Officers:Tim Burton

**03/12/2015, Report:Q2 Financial Monitoring 2015/2016**

Reporting Officers:Steve Plenty

**03/12/2015, Report:New Homes Bonus Report**

Reporting Officers:Dan Webb

**04/02/2016, Report:Treasury Management Strategy Statement, Annual Investment Strategy and MRP Policy 2016/17**

Reporting Officers:Paul Fitzgerald

**04/02/2016, Report:Earmarked Reserves Review**

Reporting Officers:Steve Plenty

**04/02/2016, Report:Capital Programme 2016/2017**

Reporting Officers:Steve Plenty

**04/02/2016, Report:General Fund Revenue Budget 2016/2017**

Reporting Officers:Steve Plenty

**04/02/2016, Report:Housing Revenue Account Budget 2016/2017**

Reporting Officers:Steve Plenty

**04/02/2016, Report:Corporate Strategy 2016/2020**

Reporting Officers:Paul Harding

**04/02/2016, Report:Somerset Waste Partnership Business Plan**

Reporting Officers:Chris Hall

**09/03/2016, Report:Community Asset Transfer Policy – Taunton Deane Borough Council and West Somerset Council**

Reporting Officers:Tim Child

Contains exempt information requiring private consideration: Yes

Exempt reason:Yes. The report may contain some commercially sensitive information.

**09/03/2016, Report:Q3 Performance Report**

Reporting Officers:Paul Harding

**09/03/2016, Report:Corporate Equality Objectives**

Reporting Officers:Christine Gale

**09/03/2016, Report:Q3 - Financial Performance report**

Reporting Officers:Steve Plenty

**09/03/2016, Report:Housing Revenue Account Business Plan Review**

Reporting Officers:James Barrah

**24/03/2016, Report:Creedwell Orchard, Milverton Option Agreement – Proposed Extension of the Trigger Date**

Reporting Officers:Adrian Priest

Contains exempt information requiring private consideration: Yes

Exempt reason:The report may contain a confidential appendix.

**21/04/2016, Report:Empty Homes Strategy and review of Empty Property Coordinator**

Reporting Officers:Mark Leeman

**21/04/2016, Report:Superfast Broadband Phase 2 report**

Reporting Officers:Ian Timms

**09/06/2016, Report:Car park variable message signage and pay on foot – Request for budget allocation**

Reporting Officers:Ian Timms

**09/06/2016, Report:TDBC revised Corporate Debt Policy**

Reporting Officers:Dean Emery

**07/07/2016, Report:Housing Revenue Account Business Plan Review**

Reporting Officers:James Barrah

**07/07/2016, Report:Q4 - Financial Outturn report**

Reporting Officers:Steve Plenty

**07/07/2016, Report:Q4 Performance Report**

Reporting Officers:Paul Harding

**04/08/2016, Report:Housing Company**

Reporting Officers:James Barrah

**04/08/2016, Report:Report on Grants Policy**

Reporting Officers:Christian Trevelyan,Mark Leeman

**08/09/2016, Report:Review of Deane Helpline**

Reporting Officers:Chris Hall

Contains exempt information requiring private consideration: Yes

Exempt reason:The report may contain some commercially sensitive information.

**08/09/2016, Report:Update on Coal Orchard Consultation**

Reporting Officers:Ian Timms

**09/11/2016, Report:Review of Council Tax Support Scheme**

Reporting Officers:Heather Tiso

**09/11/2016, Report:Deane Lottery**  
Reporting Officers:Angela Summers