Mid Devon District Council

Cabinet

Tuesday, 4 October 2022 at 10.00 am
Phoenix Chamber, Phoenix House, Tiverton

Next ordinary meeting
Tuesday, 1 November 2022 at 10.00 am

Please Note:
This meeting will take place at Phoenix House and members of the Public and Press are able to attend via Zoom. If you are intending to attend in person please contact the committee clerk in advance, in order that numbers of people can be appropriately managed in physical meeting rooms.

Zoom Meeting Link:
https://us06web.zoom.us/j/89464013141?pwd=K1liY0VzQ3Nnejk1Qk80TURwMnZrQT09

Meeting ID: 894 6401 3141
Passcode: 723581

Membership

Cllr R M Deed
Cllr C J Eginton
Cllr R J Chesterton
Cllr Mrs C P Daw
Cllr D J Knowles
Cllr B A Moore
Cllr S J Penny
Cllr C R Slade

A G E N D A

Committee Administrator: Andrew Seaman
Email: aseaman@middevon.gov.uk

Members are reminded of the need to make declarations of interest prior to any discussion which may take place

1. **Apologies**
   To receive any apologies for absence.

2. **Public Question Time**
   To receive any questions relating to items on the Agenda from members of the public and replies thereto.

3. **Declarations of Interest under the Code of Conduct**
   To record any interests on agenda matters.

4. **Minutes of the Previous Meeting** *(Pages 5 - 8)*
   To consider whether to approve the minutes as a correct record of the meeting held on 22nd September 2022

5. **3 Rivers Developments Limited – Funding Request**
   Report to follow.

6. **Financial Monitoring**
   A verbal update from the Deputy Chief Executive (S151).

7. **Data Protection Policy** *(Pages 9 - 20)*
   Report of the Corporate Manager for Business Transformation and Customer Engagement.

8. **Freedom of Information Policy** *(Pages 21 - 34)*
   Report of the Corporate Manager for Business Transformation and Customer Engagement.

9. **Records Management Policy** *(Pages 35 - 38)*
   Report of the Corporate Manager for Business Transformation and Customer Engagement.

10. **Tiverton A361/HIF Scheme - update** *(Pages 39 - 46)*
    To receive a report from the Director of Place to inform Cabinet of the latest position regarding the Tiverton HIF/A361 junction scheme and to seek decisions regarding next steps.

11. **Shopfront Enhancement Scheme** *(Pages 47 - 54)*

12. **Crediton Neighbourhood Plan** *(Pages 55 - 130)*
    Report of the Director of Place.

13. **Non Statutory Interim Planning Policy Statement: Climate Emergency** *(Pages 131 - 264)*
    Report of the Director of Place.

14. **Notification of Key Decisions** *(Pages 265 - 274)*

Committee Administrator: Andrew Seaman
Email: aseaman@middevon.gov.uk

To note the contents of the Forward Plan.

Stephen Walford
Chief Executive
Monday, 26 September 2022

Meeting Information
From 7 May 2021, the law requires all councils to hold formal meetings in person. The Council will enable all people to continue to participate in meetings via Zoom.

If you want to ask a question or speak, email your full name to Committee@middevon.gov.uk by no later than 4pm on the day before the meeting. This will ensure that your name is on the list to speak and will help us ensure that you are not missed. Notification in this way will ensure the meeting runs as smoothly as possible.

If you would like a copy of the Agenda in another format (for example in large print) please contact Andrew Seaman on: E-Mail: aseaman@middevon.gov.uk

Public Wi-Fi is available in all meeting rooms.

Committee Administrator: Andrew Seaman
Email: aseaman@middevon.gov.uk

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MID DEVON DISTRICT COUNCIL

MINUTES of a **MEETING** of the **CABINET** held on 22 September 2022 at 10.00 am

Present Councillors	R M Deed (Leader) C J Eginton, D J Knowles and C R Slade
Apologies Councillor(s)	R J Chesterton, Mrs C P Daw, B A Moore and S J Penny
Also Present Councillor(s)	S J Clist, J Buczkowski and B G J Warren
Also Present Officer(s):	Stephen Walford (Chief Executive), Andrew Jarrett (Deputy Chief Executive (S151)), Richard Marsh (Director of Place), Maria De Leiburne (Operations Manager for Legal and Monitoring), Jill May (Director of Business Improvement and Operations) and Sarah Lees (Member Services Officer)

57. **APOLOGIES**

Apologies were received from Councillors R J Chesterton, Mrs C Daw, B A Moore and S J Penny.

58. **PUBLIC QUESTION TIME**

The following question had been received by Mr Nick Quinn, a local resident:

My question Concerns the whole Agenda and the Meeting in General

It is my opinion that the documents to be discussed at this meeting were not made available and/or published for the legally required publication period.

Question 3: Can the Leader assure me that he is satisfied that the proper procedures have been followed for calling the meeting and that the required notice was given for all the documents to be discussed at this meeting?

Thank you

The Leader answered the question by stating that he was content all was in order.

59. **MINUTES OF THE PREVIOUS MEETING**

The minutes of the meeting held on 6th September 2022 were confirmed as a correct record and signed by the Leader.

60. **DECLARATIONS OF INTEREST UNDER THE CODE OF CONDUCT**

There were no interests declared under this item.

61. **3 RIVERS DEVELOPMENTS LIMITED – FUNDING REQUEST (00:05:00)**

The Scrutiny Committee had met the previous day to discuss a decision which had been taken by the Cabinet on 6th September 2022 in relation to a 3 Rivers Development Limited Funding Request and which had been called in by the Chairman of the Scrutiny Committee.

The Scrutiny Committee had asked for the following comments to be passed back to the Cabinet for further consideration:

The Scrutiny Committee were of the opinion that the updates contained in the Cabinet papers of 6th September were of such significance that the Committee believed that they constituted a new business plan rather than a simple update and therefore the Committee recommended that Cabinet, before reaching a decision on further borrowing, ensured that the agreed due diligence and governance steps were carried out, namely that the business plan was reviewed by the Audit Committee and that they were given the opportunity to comment on any risks and mitigations and that the opinion of the Audit Committee would be taken into account when making any further lending decisions.

(Proposed by Cllr J Buczkowski and seconded by Cllr L J Cruwys)

Having considered the comments of the Scrutiny Committee the Cabinet gave consideration to:

- The Bank of England base rate increase from 2.25% from 1.75% due to be announced on 22nd September and the effect of this on 3 Rivers Development Company and its Loans.
- The effect of any subsequent delay in decision making monetarily.
- The revised Business Plan which would be presented to the Scrutiny and Audit Committees, as per the agreed procedure, in November 2022.

The Cabinet **RESOLVED** not to support the recommendation of the Scrutiny Committee and to remain consistent with its view taken on 6th September:

That it be agreed to increase the current loan agreements by a total of £2,280,784 to cover; the identified project overspends on 2 projects included in the previously agreed Business Plan funding envelope agreed on the 30 November 2021 and increased the working capital loan agreement. In addition, it be agreed that a transfer from a future projects budget of £0.58m in order for the business to work up new potential projects to replace the out of District projects that had to be removed from the company's business plan after changes to the Treasury's Public Works Loan Board loan arrangements.

(Proposed by the Leader)

(The meeting ended at 10.16 am) **CHAIRMAN**

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CABINET
4 OCTOBER 2022

DATA PROTECTION POLICY

Cabinet Member: Cllr Clive Eginton
Responsible Officer: Lisa Lewis, Corporate Manager Business Transformation and Customer Engagement

Reason for Report: To review the existing policy to ensure compliance with the Data Protection Act (DPA) 2018 and the General Data Protection Regulations.

RECOMMENDATION(S): That the Data Protection Policy be approved and the next review date set for 3 years hence.

Financial Implications: The Data Protection Policy does not have any financial implications itself rather the contrary if the DPA 2018 and GDPR are not complied with.

Legal Implications: Not complying with the DPA 2018 and GDPR would expose MDDC to enforcement action by the Information Commissioner's Office (ICO).

Risk Assessment: Approving the Data Protection Policy reduces the risk of enforcement action by the ICO.

Equality Impact Assessment: No equality issues identified for this report.

Relationship to Corporate Plan: This policy supports good governance arrangements enabling confidence in delivery of the Corporate Plan.

Impact on Climate Change: There are no implications relating to Climate Change with this policy.

1.0 Introduction

1.1 The Data Protection Act 2018 received royal assent on 23 May 2018. This represented the first major change to data protection for personal data for 20 years and incorporated the requirements of the GDPR, the Law Enforcement Directive and other amendments such as changes to the powers of the ICO and enforcement.

2.0 The Policy

2.1 The policy is based on best practice.

2.2 There have been no further changes identified as being necessary since the review of the policy in 2019.

2.3 Staff are required to refresh their knowledge and understanding on an annual basis. This training is available via the Learning Management System.

2.4 Members also have a responsibility to fully understand the practical application of the policy and the importance of care around personal data. To ensure this a member briefing on Data Protection has been scheduled for 4 October 2022 at 17:30.

3.0 Staff Changes

3.1 The council takes Data Protection and Information Management very seriously. We have recently recruited a new Information Management Team who commenced work with MDDC on 4 July 2022.

- Data Protection Officer - Giovanni Wallace
- Information Management Officer – Ewan Girling

4.0 Conclusion

4.1 That the Data Protection Policy be approved and the next review date set for 3 years hence.

Contact for more Information: Lisa Lewis, Corporate Manager Business Transformation and Customer Engagement (llewis@middevon.gov.uk)

Circulation of the Report: Cabinet Member and Leadership Team

Mid Devon District Council

Data Protection Policy

Policy Number: IM 002

~~June 2019~~Aug 2022

Version Control Sheet

Title: **Data Protection Policy and Guidance**

Purpose: **To detail the commitment of MDDC to the protection of personal data, and to advise Officers, and Members, on the standards to be implemented regarding personal data processing.**

Owner: **Data Protection Officer** ~~Group Manager for Performance, Governance and Data Security cyandle~~gwallace@middevon.gov.uk
~~**01884 234975**~~

Version Number: ~~**6**~~**5.0**

Status: ~~**Draft**~~**LIVE**

Review Frequency: ~~Every three years~~Triennial or before if new legislation is implemented.

Next review date: ~~**May 2022**~~**Aug 2025**

Consultation **This document was sent out for consultation to the following:**
Group Managers and Leadership Team

Document History
This document obtained the following approvals.

Title	Date	Version Approved
Data Protection Officer/Group Managers	July 2022~~18 June 2019~~	V6.0
Leadership Team	~~18 June 2019~~	V6.0
Cabinet	~~27 June 2019~~	V6.0

Roles

Senior Information Reporting Officer: Jill May

Data Protection Officer: ~~Catherine Yandle~~Giovanni Wallace

Group Managers; includes Head of Planning and Leisure Managers

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Data Protection Policy

1. Introduction

Mid Devon District Council (MDDC) is required to control and process personal data by virtue of its provision of services to the residents of the district and the legislative framework governing those services. This requirement to collect and process personal information is critical to the work carried out by Officers and Members.

Our residents, partners and suppliers have an expectation that they can deal with MDDC~~us~~ in the knowledge that the Council will process their data legally, transparently, without prejudice and only where necessary~~properly~~.

The Data Protection Act 2018 and the UK/GDPR provides the legislative framework and this policy provides the specific guidance for processing personal data within the Council.

2. Related Documents

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ICT 0001 Information Security Policy
IM 001 Records Management Policy
ICT 0010 Freedom of Information Policy
ICT 0014 Information Security Incident Policy

3. Scope

This policy applies to everybody who has access to any personal data held by, or on behalf of, MDDC.

In order to operate efficiently, MDDC has to collect and use information about data subjects~~people~~ with whom it works and for whom it provides services. These may include members of the public, current, past and prospective employees, clients, customers, and suppliers.

In addition, the Council may be required to collect and process information in order to comply with specific legislative requirements.

The Data Protection Act and UK/GDPR requires that this personal information must be fairly and transparently collected and properly handled, ~~how ever~~however it is collected, recorded and used, ~~and~~ whether it be on paper, ~~in~~ computer files or recorded by any other means.

MDDC~~The Council~~ must ensure that all Employees, Elected Members, Contractors, Agents, Consultants, Partners or other servants of MDDC~~the Council~~ who have access to any personal data held by, or on behalf of MDDC~~the Council~~, are fully aware of and abide by their duties and responsibilities under the Act.

4. Policy Statement

MDDC~~The Council~~ regards the lawful and correct treatment of personal information as very important to its successful operations and to maintaining confidence between MDDC~~the Council~~ and those with whom it carries out business. -MDDC~~The Council~~ will ensure that it treats personal information lawfully and correctly.
To this end MDDC~~the Council~~ fully endorses and adheres to thehe ~~he six~~ Principles of Data Protection as set out in the Data Protection Act 2018 Data protection: The Data Protection Act - GOV.UK (www.gov.uk) and UK/GDPR The principles | ICO.

5. The principles of data protection

The Act stipulates that anyone processing personal data must comply with the ~~**Six**~~ **Principles** of good practice. These Principles are legally enforceable.

The Principles require that personal information shall be:

- **Lawfully, Fairly, Transparently** - Data will be processed lawfully, fairly and in a transparent manner in relation to individuals;

- **Purpose, Limitation** - Data will be collected for specified, explicit and legitimate purposes and not further processed in a manner that is incompatible with those purposes; further processing for archiving purposes in the public interest, scientific or historical research purposes or statistical purposes shall not be considered to be incompatible with the initial purposes;

- **Data Minimisation** - Data collection will be adequate, relevant and limited to what is necessary in relation to the purposes for which they are processed;

- **Accurate** – Collected Data will be accurate and, where necessary, kept up to date; every reasonable step must be taken to ensure that personal data that are inaccurate, having regard to the purposes for which they are processed, are erased or rectified without delay;

- **Storage Limitation** - Data will be kept in a form which permits identification of data subjects for no longer than is necessary for the purposes for which the personal data are processed; personal data may be stored for longer periods insofar as the personal data will be processed solely for archiving purposes in the public interest, scientific or historical research purposes or statistical purposes subject to implementation of the appropriate technical and organisational measures required by the GDPR in order to safeguard the rights and freedoms of individuals;

- **Integrity, Confidentiality** - processed in a manner that ensures appropriate security of the personal data, including protection against unauthorised or unlawful processing and against accidental loss, destruction or damage, using appropriate technical or organisational measures;

~~1. processed lawfully, fairly and transparently in relation to the data subject;~~

- **Accountability** - The controller shall be responsible for, and be able to demonstrate compliance.

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6. Special Category Data

The DPA and UK/GDPR~~Act~~ provides conditions for the processing of any personal data. It also makes a distinction between **personal data and "special category" data**.

Personal data is defined as, data relating to a living individual who can be identified from:

- That data or
- That data and other information which is in the possession of, or is likely to come into the possession of the data controller and includes an expression of opinion about the individual and any indication of the intentions of the data controller, or any other person in respect of the individual.

Special category data is defined as personal data consisting of information revealing:

- Racial or ethnic origin;
- Political opinions;
- Religious or philosophical beliefs;
- Trade union membership;
- ~~Processing of~~ Genetic data - for the purpose of uniquely identifying a natural person~~, or~~
- Biometric data for the purpose of uniquely identifying a natural person
- Data concerning health;
- Sex life;
- Sexual orientation.

The aim of the policy is to ensure a legal framework for managing MDDC's processing of Personal Data and to ensure that the MDDC~~Council~~:

- creates and captures authentic and reliable records to demonstrate evidence, accountability and information about its decisions and activities
- facilitates auditing and protects its legal and other rights by;
  - maintaining personal records securely and preserving access to them
  - disposing appropriately of personal records that are no longer required
  - maintaining the accuracy of personal records
  - conforming to legal and statutory requirements relating to personal record keeping

6. Identification of roles and responsibilities

- The Senior Information Reporting Officer for MDDC is ultimately responsible for ensuring proper application of Data Protection within MDDC with the Data Protection Officer responsible for overseeing the day to day implementation of the Data Protection principles by Services in relation to personal data management as set out in this policy.
- The Data Protection Officer will provide the link between Leadership Team, Data Protection, Freedom of Information and Records Management practices. Where

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appropriate, this post will co-ordinate activities, such as maintaining the Publication Scheme.

- Group Managers are responsible for the management of personal data processed by their services, in accordance with this policy, and ensuring that all staff are aware of Data Protection requirements.
- All Councillors and Employees of MDDC will be responsible for ensuring that the personal data they control in relation to their work is maintained in accordance with the data protection principles.
- All Staff have the responsibility of ensuring compliance with the requirements of Data Protection legislation and this is included in their job descriptions

7. Training and Awareness

Since any MDDC employee may be involved in creating, maintaining and using personal information/records, it is vital that everyone understands their responsibilities as set out in this policy. All Officers and Councillors are required to have read and accepted the Data Protection Policy and in so doing agree to act in accordance with it and the data protection principles referred to above. This will be renewed annually. Group managers will ensure that staff responsible for managing personal data are appropriately trained or experienced and that all staff understand the need for proper management of personal data.

A mandatory training programme has been established to ensure that all staff are aware of their obligations concerning Data Protection, as well as Freedom of Information, Information Security Incidents and Information/Records Management.

8. Handling of personal/special category information

MDDC will apply, through this policy, appropriate management and the use of controls to:-

- Observe fully conditions regarding the fair collection and use of personal information;
- Meet its legal obligations to specify the purpose for which information is used;
- Collect and process appropriate information - only to the extent that it is needed to fulfil operational needs or to comply with any legal requirements;
- Ensure the quality of information used;
- Apply checks to determine the length of time information is held and ensure it is appropriately disposed of after use;
- Take appropriate technical and organisational security measures to safeguard personal information held;
- Ensure that personal information is not transferred abroad without suitable safeguards;
- Ensure that the rights of people about whom the information is held can be fully exercised under the Act.

  These include:

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- The right to be informed that processing is being undertaken;
- The right of access to their personal information within the statutory calendar month;
- The right to restrict or object to processing in certain circumstances;
- The right to rectify information found to be wrong;
- The right to erasure (also known as 'right to be forgotten');
- The right to data portability;
- Rights related to automated decision making and profiling.

In addition, MDDC~~the Council~~ will ensure that:

- Everyone managing and handling personal information understands that they are contractually responsible for following good data protection practice;
- Everyone managing and handling personal information is appropriately trained to do so;
- Everyone managing and handling personal information is appropriately supervised;
- Anyone wanting to make enquiries about handling personal information, whether a member of staff or a member of the public, knows what to do;
- Queries about handling personal information are promptly and courteously dealt with;
- Methods of handling personal information are regularly assessed and evaluated;
- Data sharing is carried out under a written agreement, setting out the scope and limits of the sharing. Any disclosure of personal data will be in compliance with approved procedures.

All Elected Members are to be made fully aware of this policy and of their duties and responsibilities under the Act.

All managers and staff will take steps to ensure that personal data is kept secure at all times against unauthorised or unlawful loss or disclosure and in particular will ensure that:

- Paper files and other records or documents containing personal/special category data are kept in a secure environment;
- Personal data held on computers, mobile devices and computer systems is protected by the use of secure passwords, as per the password policy ~~which have forced changes periodically~~;
- ~~Individual passwords should be such that they are not easily compromised.~~

All contractors, consultants, partners or other servants or agents of MDDC~~the Council~~ must:

- Ensure that they and all of their staff who have access to personal data held or processed for, or on behalf of MDDC~~the council~~, are aware of this policy and are fully trained in and are aware of their duties and responsibilities under the Act. Any breach of any provision of the Act will be deemed as being a breach of any contract between MDDC~~the Council~~ and that individual, company, partner or firm;
- Allow data protection audits by MDDC~~the Council~~ of data held on its behalf (if requested);
- ~~Indemnify~~Indemnify MDDC~~the Council~~ against any prosecutions, claims, proceedings, actions or payments of compensation or damages, without limitation.

All contractors who are users of personal information supplied by MDDC~~the council~~ will be required to confirm that they will abide by the requirements of the DPA and UK/GDPR~~Act~~ with regard to information supplied by the MDDC~~Council~~.

9. Disclosure of Personal Data

Personal Data will only be disclosed in accordance with the provisions of the DPA or UK/GDPR

Any member of the public is entitled to request copies of all personal information that MDDC~~the Council~~ holds about them. This is called a Subject Access Request (SAR).

SAR forms should be completed by the person requesting their information and submitted to the Data Protection Officer, with proof of identification. Once the SAR form has been received the information should be provided within one calendar month.

Please note that where documents or files contain the personal information of several different people, this will be redacted in accordance with the DPA and UK/GDPR before releasing the information.

10. Violations of Rules and Procedures

- It is the responsibility of all employees to report any suspected data breach~~ of the DPA~~ or of this policy to their Group Manager using the Information Security Incident form at the end of that policy (ICT 00014) as soon as they become aware of it.
- It is the responsibility of all Members to report any suspected Data~~breach of the DPA~~, or this policy, to the Data Protection Officer as soon as they become aware of it.
- Disciplinary action in accordance with procedures approved by the Council may be taken against any employee or Member who deliberately breaches the DPA, UK/GDPR or the requirements of this policy. The Information Commissioner's Office may also investigate in this situation. Failure to comply by partners, agents or contractors may constitute a breach of their data sharing agreements or contracts.

11. Implementation

The Data Protection Officer has been appointed with overall responsibility for coordinating consistent Data protection implementation across the Council. Group Managers will be responsible for ensuring that the Policy is implemented within their services. Implementation will be led and monitored by the Data Protection Officer who will also have overall corporate responsibility for:

- The provision of cascade data protection training for staff within the Council.
- The development of best practice guidelines.
- Carrying out compliance checks or information audits to ensure adherence, with the Data Protection Act throughout the Council.

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12. Notification to the Information Commissioner

The DPA 2018 and UK/GDPR requires every data controller, who is processing personal data, to notify the Information Commissioner's Office, and to renew their notification on an annual basis. Any changes to the register must be notified to the Information Commissioner, within 28 days. Failure to notify is a criminal offence.

MDDC is registered and appears on the public register of data controllers maintained by the Information Commissioners Office.

The Data Protection Officer is responsible for notifying and updating the Information Commissioner's Office of changes to the processing of personal data by the Council.

Any changes made to the processing of personal data between annual notifications must be brought to the attention of the Data Protection Officer immediately.

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CABINET
4 OCTOBER 2022

FREEDOM OF INFORMATION AND ENVIRONMENTAL INFORMATION REGULATIONS POLICY

Cabinet Member: Cllr Clive Eginton
Responsible Officer: Lisa Lewis, Corporate Manager Business Transformation and Customer Engagement

Reason for Report: To review the existing policy to ensure compliance with the Data Protection Act (DPA) 2018 and the General Data Protection Regulations.

RECOMMENDATION(S): That the revised Freedom of Information and Environmental Information Regulations Policy be approved and the next review date set for 3 years hence.

Financial Implications: The Freedom of Information and Environmental Information Regulations Policy does not itself have any financial implications but the Council incurs significant costs meeting the requirements of the legislation. The direct cost of the Information Management Team in responding to FOI/EIR requests is in the region of £30,000 and there is also an indirect cost for the time of many other staff in replying to requests for information. The Council reserves the right to make permitted charges for particularly large or complicated requests on a case by case basis.

Legal Implications: Not complying with the Freedom of Information Act 2000 (FOIA) and Environmental Information Regulations 2004 (EIR) would expose MDDC to the potential for enforcement action by the Information Commissioner's Office (ICO).

Risk Assessment: Approving the Freedom of Information and Environmental Information Regulations Policy reduces the risk of enforcement action by the ICO.

Equality Impact Assessment: No equality issues identified for this report.

Relationship to Corporate Plan: This policy supports good governance arrangements enabling confidence in delivery of the Corporate Plan.

Impact on Climate Change: There are no implications relating to Climate Change with this policy.

1.0 Introduction

1.1 The policy was last reviewed in 2019 and as agreed at the adoption of the policy should be reviewed every three years or if legislation changes determine a change in policy or practice.

2.0 The Policy

2.1 The existing policy is based on best practice. There have been no amendments identified as being necessary since the review of the policy in 2019.

3.0 **Staff Changes**

3.1 The council takes Data Protection and Information Management very seriously. We have recently recruited a new Information Management Team who commenced work with MDDC on 4 July 2022.

- Data Protection Officer - Giovanni Wallace
- Information Management Officer – Ewan Girling

4.0 Conclusion

4.1 That the revised Freedom of Information and Environmental Regulations Policy be approved and the next review date set for 3 years hence**.**

Contact for more Information: Lisa Lewis, Corporate Manager Business Transformation and Customer Engagement (llewis@middevon.gov.uk)

Circulation of the Report: Cabinet Members and Leadership Team

Mid Devon District Council

Freedom of Information and Environmental Information Regulations Policy

Policy Number IM 005

Aug 2022

Version Control Sheet

Title: **Freedom of Information (FOI) and Environmental Information Regulations (EIR) Policy**

Purpose: **To detail the commitment of Mid Devon District Council (MDDC) to Freedom of Information and Environmental Information Regulations and to advise Officers and Members, on the standards to be implemented.**

Owner: *Senior Information Risk Owner (SIRO)*

Date: **Aug 2022~~June 2019~~**

Version Number: **5~~4~~.0**

Status: **Final**

Review Frequency: **Triennial~~Every three years~~**

Next review date: **Aug 2025~~June 2022~~**

Consultation **This document was sent out for consultation to the following:**
Group Managers Team
Leadership Team
Cabinet Member

Document History
This document obtained the following approvals.

Title	Date	Version Approved
Group Managers Team	~~June 2019~~	5~~4~~.0
Leadership Team	~~June 2019~~	5~~4~~.0
Cabinet	~~June 2019~~	5~~4~~.0

Mid Devon District Council

Freedom of Information and Environmental Information Regulations Policy

1. Introduction

Since 1st January 2005 all requests for information received by a public authority have had to be answered in accordance with the Freedom of Information Act 2000 (FOIA) or the Environmental Information Regulations 2004 (EIR). The only exception to this is a request for personal information where the individual can request their own personal data, called a Subject Access Request (SAR). The main principle behind FOI legislation is that people have a right to know about the activities of public authorities, unless there is a good reason for them not to. Access to information helps the public hold public authorities to account for their actions and allows public debate to be better informed and more productive. Access to official information can also improve public confidence and trust if government and public sector bodies are seen as being open.

The FOIA and EIR confer rights of access for members of the public to information held by public authorities. The Acts also place obligations on public authorities to proactively publish certain information and respond to requests for information in accordance with the legislation.

2. Scope

The Acts cover all recorded information held by the MDDC~~council~~. Recorded information includes printed documents, computer files, letters, emails, photographs, and sound or video recordings. It is not limited to official documents and it covers, for example, drafts, emails, notes, recordings of telephone conversations, and CCTV recordings. Nor is it limited to information MDDC~~the Council~~ creates, so it also covers, for example, letters received from members of the public.

Meta-data, found within the properties of a document, is recorded information and therefore must be considered for release under the legislation. Information held on behalf of MDDC~~the Council~~ is also covered, even if it is not held on MDDC ~~Council~~ premises.

Although individual Councillors are not public authorities in their own right, information that they hold about MDDC~~Council~~ business or on behalf of the MDDC~~Council~~ falls within the scope of the Acts and must also be considered for release.

Information held solely on behalf of another person, body or organisation is not covered by the FOIA but may be covered by EIR. An employee's purely private information is not covered, even if it is on a work computer or email account; nor is information that is stored solely on behalf of a trade union, or an individual Councillor.

MDDC~~The Council~~ only has to provide information that is already held in recorded form in response to a request. MDDC~~The Council~~ is not obliged to create new information or find the answer to a question from an officer who may happen to know it.

3. Legal obligations under the Acts

A lot of the regulations are the same under both pieces of legislation but there are differences.

MDDC~~The Council~~ has two main obligations under the Acts:

- To publish certain information proactively
- To respond to requests for information

In order to meet the requirement to publish information proactively, MDDC~~the Council~~ is required to maintain a publication scheme. This lists the information that is currently made available to the public, describes how such information can be accessed and any charges associated with providing this information.

MDDC~~The Council~~ will use the Information Commissioners Office (ICO) template for the publication scheme. This is in accordance with ICO guidance and means that the scheme does not need to be submitted for approval. The scheme will be reviewed ~~annually and periodically~~in accordance with the review date of the Policy, in accordance with changes made to the model scheme by the ICO.

Section 1 of the FOIA states:

(1) Any person making a request for information to a public authority is entitled-
(a) To be informed in writing by the public authority whether it holds information of the description specified in the request, and
(b) If that is the case, to have that information communicated to them~~him~~.

A request for information under FOI is valid if it is made in writing (an EIR request may be verbal) and provides a name and a postal or email address to which the requested information can be sent. Organisations as well as individuals can make requests, including newspapers, companies and campaign groups. Under the

legislation, a response must be issued within 20 working days, providing the requested information or stating the reason that it has been withheld.

MDDCThe Council must make staff, contractors and customers aware of how the legislation may affect them. It should be made clear that MDDCthe Council cannot guarantee complete confidentiality of information. As a public body, MDDCthe Council must consider for release any information that is held if it is requested.

In addition, two codes of practice contain recommended good practice when applying the Act. SThe section 45 code of practice gives recommendations for public authorities on their handling of requests. SThe section 46 code of practice covers good records management practice and the obligations of public authorities under the Public Records Acts to maintain their records in an ordered and managed way, so they can readily retrieve information when it is needed.

These codes of practice are not directly legally binding but failure to follow them is likely to lead to breaches of the Acts. In particular there is a link between following part II of Sthe section 45 code of practice and complying with section 16 of the Act in relation to advice and assistance.

Compliance with this policy is compulsory for all staff employed by MDDCthe Council. A member of staff who fails to comply with the policy may be subject to disciplinary action under MDDC'sthe Council's disciplinary policy.

Managers are responsible for ensuring that their staff are made aware of the existence and content of this policy.

4. Enforcement of the Acts

FOI and EIR are regulated by the ICO, who provide guidance in relation to the Acts and can issue decision notices that require MDDCthe Council to release previously withheld information. Under the provisions of section 54 of the FOIA, if MDDCthe Council fails to comply with a decision notice, the Commissioner may certify in writing to the court that the public authority has failed to comply with that notice. The court may inquire into the matter and, after hearing any witnesses who may be produced against or on behalf of, the public authority, and after hearing any statement that may be offered in defence, deal with the authority as if it had committed a contempt of court.

Destruction or concealment of information with the intention of preventing disclosure is a crime under section 77 of the FOIA. Depending on the nature of the incident, an authority, or its individual members of staff could be charged with this offence. The penalty is a fine.

There are no financial or custodial penalties for failure to provide information on request or for failure to publish information. But you could be found in contempt of court for failing to comply with a decision notice, enforcement notice, or information notice. This could lead to a fine or, in theory, jail for a senior officer of the authority.

5. Environmental information

The EIR create additional rights of access to environmental information. It is important that requests for environmental information are identified as such and dealt with in accordance with the appropriate legislation. The EIR operate broadly in the same way as the FOIA. The most significant differences relate to the circumstances under which information can be withheld. It is the role of the Information Management Officer (IMO) to determine whether the information requested falls within the scope of the EIR, to process the request appropriately and to determine the correct exemceptions.

6. Personal information

A member of the public is entitled to request third party personal information under the FOI/EIR. It is important to carefully balance the case for transparency and openness under the FOI/EIR against the data subject's right to privacy under the Data Protection Act 2018 (DPA). A decision will have to be made on a case by case basis as to whether the information can be released without breaching the data protection principles, redacting information before release as necessary.

FOIA does not give people a right of access to their own personal data. If a member of the public wants to see information that MDDC~~the Council~~ holds about them, they should make a Subject Access Request under the DPA / UK GDPR. For more information please refer to the separate Data Protection Policy (IM 002).

7. Copyright and intellectual property rights

MDDC~~The Council~~ is not entitled to place any conditions or restrictions on access to information under the Acts. MDDC~~The Council~~ is entitled to include a copyright notice with the information that is disclosed, bringing the requestors attention to any restrictions on redistribution of the requested information. This will enable MDDC~~the Council~~ to make a claim in the courts if the requestor or someone else uses the information in breach of copyright.

The ICO encourages public authorities to use an open government license provided by the National Archives. This describes any restrictions on redistribution and reuse of information provided.

9. Withholding information

An applicant does not need to provide a reason for wanting the information but justification must be made for refusing to disclose the information. When deciding whether to release information to the public there is a presumption in favour of disclosure. This means that disclosure of information should be the default position for MDDC~~the Council~~. Information should only be withheld when there is a good reason to do so and it is permitted by the legislation.

The FOIA contains several conditions under which MDDC~~the Council~~ is entitled to refuse information. These are described as exemptions and are contained within different sections of the Act itself. Requests can be refused for a number of reasons, including confidentiality, commercial interests, personal information and when there are statutory prohibitions on disclosure. It is the responsibility of the IMO to decide whether information can be withheld and to provide written justification to the requestor within the formal response. Any appropriate exemptions will be quoted as will any associated public interest test. Please refer to Appendix 1 for a complete list of these exemptions.

The EIR contain exceptions under which environmental information can be withheld, these are similar but not the same as the exemptions under FOIA. Please refer to Appendix 1 for a complete list of these exceptions.

Information should only be disclosed under the Acts if it would be disclosed to anyone else who asked for it. Information should be released under the Acts as if it was being released to the world at large i.e. it can be made public unless there are express reasons why not.

The FOIA itself does not prevent MDDC~~the Council~~ from voluntarily disclosing information outside the provisions of the Act.

10. Advice and assistance

MDDC~~The Council~~ is obliged to provide advice and assistance to members of the public who wish to request information. This obligation extends to assistance with the formulation of a request, modifying a request to bring it in line with the 'appropriate limit' set out in section 12 (FOIA), and identifying the potential location of information that is not held by the Council.

11. Costs

There is a limit to the amount of time a local authority can be asked to spend on a single request. For FOI the 'appropriate limit' is 18 hours and is set out in section12 of the FOIA. MDDC~~The Council~~ is entitled to refuse a request if it is estimated that

responding to the request will exceed this limit. The EIR do not have this same time limit.

~~Mid Devon District Council~~MDDC is entitled to charge a fee against costs reasonably incurred when informing the requestor whether information is held and communicating that information. Such costs may include postage and photocopying but not locating or retrieving the information itself. Any fee charged must be calculated in accordance with the Freedom of Information, Environmental Information Regulations and/or Data Protection (Appropriate Limit and Fees) Regulations 2004 SI No. 3244 as appropriate.

It is the current policy of MDDC to provide information free of charge whenever possible. MDDC~~The Authority~~ does reserve the right to charge for particularly large or complicated requests on a case by case basis.

12. Complaints procedure

If a member of the public is not satisfied with the response that they receive to an FOI/EIR request, or believes the charges to be excessive, they are entitled to complain to MDDC~~the Council~~ and request that an internal review of the decision is conducted. Complaints can be submitted to:

Information Management Officer
Mid Devon District Council
Phoenix house
Phoenix Lane
Tiverton
Devon
EX16 6PP

Email: foi@middevon.gov.uk

Complaints are to be passed to the IMO who will then convene a review panel. The review panel will consist of the ~~Senior Information Risk Owner~~ Data Protection Officer (~~SIRO~~DPO) or their nominated representative with relevant FOI/EIR and Data Protection knowledge and in contentious cases a member of Legal Services. The panel will review the way in which the request was handled and address any particular concerns that were referred to in the complaint. A formal response will be sent out detailing the outcome of the review. EIR reviews must be completed within 40 working days, FOI reviews are best practice rather than a statutory requirement but it is MDDC~~our~~ policy to do them and every effort would be made to complete the review within 20 working days.

If the requestor remains dissatisfied, theys~~/he~~ arei~~s~~ entitled to complain directly to the Information Commissioner and request that theys~~he~~ investigate~~s~~ the way in which their request has been handled. The Commissioner may then decide to issue a decision notice which upholds, partially upholds or overturns MDDC's~~the Council's~~ decision.

Either party can appeal a decision notice issued by the Information Commissioner to the Information Tribunal which will then either uphold the decision notice or substitute it with an amended or entirely new decision. This is the final point of appeal for FOI/EIR requests.

13. Identification of roles and responsibilities

The IMO will be responsible for processing requests for information. This will include logging each request on the Register, coordinating the retrieval of requested information, determining what of the requested information should be released and issuing a formal response to the requestor.

They will also be responsible for maintaining the publication scheme and conducting an annual review of its contents. This will involve ensuring that the most recent versions of documents are available and that the information published is accurate and up to date.

At the end of each month a disclosure log of all FOI/EIR requests received and completed in the month is published on our website.

Service FOI/EIR Representatives will be nominated from each service area. FOI/EIR Representatives will be responsible for the retrieval of requested information and providing it to the IMO. They are also responsible for communicating any concerns or problems with the disclosure of the requested information, as soon as possible after the request is allocated to them.

All officers will have a responsibility under the Acts to ensure that requests are identified and handled in accordance with the legislation. Officers will undertake mandatory training to ensure they are aware of these responsibilities.

Requests for information will be passed to the IMO at the earliest opportunity and information requested under the Act will be retrieved in sufficient time for any exemptions or exceptions to be considered and a response issued within the statutory 20 working day time limit.

14. Training and awareness

It is essential that MDDCall Council officers and elected members are familiar with the requirements of the Acts.

The Data Protection Officer will ensure that there is a training plan to raise awareness of the Act across MDDCthe Council. Reference material and guidance is available on SharePoint and regular updates are provided via MDDC'sthe Council's internal communications. There is also mandatory training on MDDC'sthe Council's e-learning software; completion of this is monitored.
Training will also be offered to Councillors, this training will be specifically tailored to ways in which the Acts apply to elected members in addition to more general guidance and information about the legislation.

The Council'sMDDC's commitment to proactive publication will be communicated to the public through the website. This will include details of how a request can be submitted, advice about what information is already published and guidance about how to submit a request.

15. Performance measures

The IMO will maintain records of all requests received and the response issued. Monthly statistics will be reported to the DPO, the SIRO and Members and are published on the website. A disclosure log of all FOI and EIR requests is published on the website at the end of each month.

Open data is also published on the website, providing details of statistics that are regularly requested. Each dataset includes details of what is contained and how frequently it will be updated.

16. Review of policy

This policy will be reviewed in 20255~~2~~ in accordance with any changes made to relevant legislation and to ensure the policy reflects any changes required.

17. Relationship with existing policies

This policy has been formulated in accordance with the following Council documents:

IM 001 Records Management Policy
IM 002 Data Protection Policy

Compliance with this policy will also facilitate compliance with the Data Protection Act 2018 and the UK GDPR.

Appendix 1

Exemptions under the FOIA

Section 12 – Exceeds the appropriate limit for cost and time.
Section 14 – Repeated or vexatious requests
Section 21 – Information reasonably accessible by other means
Section 22 – Information intended for future publication
Section 23 – Security bodies
Section 24 – Safeguarding national security
Section 25 - Certificates under ss.23 and 24: supplementary provision
Section 26 – Defence
Section 27 – International relations
Section 28 – Relations within the UK
Section 29 – The economy
Section 30 – Investigations
Section 31 – Law enforcement
Section 32 – Information contained in court records/transcripts
Section 33 – Public audit
Section 34 – parliamentary privilege
Section 35 – Policy formulation
Section 36 – Effective conduct of public affairs
Section 37 – Communications with Her Majesty and the awarding of honours
Section 38 – Health and safety
Section 39 – Environmental information
Section 40 – Personal information
Section 41 – Information provided in confidence
Section 42 – Legal professional privilege
Section 43 – Public sector contracts, commercial interests
Section 44 – Prohibitions on disclosure

Exceptions under the EIR

Regulation 12(4)(a) – Information not held
Regulation 12(4)(c) – Request formulated in too general a manner
Regulation 12(4)(d) – Material in the course of completion
Regulation 12(4)(e) – Internal communications
Regulation 12(5)(a) – Internal relations, defence, national security or public safety
Regulation 12(5)(b) – The course of justice and enquiries
Regulation 12(5)(c) – Intellectual property rights
Regulation 12(5)(d) – Confidentiality of proceedings
Regulation 12(5)(e) – Confidentiality of commercial or industrial information
Regulation 12(5)(g) – Protection of the environment

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CABINET
4 OCTOBER 2022

RECORDS MANAGEMENT POLICY

Cabinet Member: Cllr Clive Eginton
Responsible Officer: Lisa Lewis, Corporate Manager Business Transformation and Customer Engagement

Reason for Report: Good records management is a key factor in achieving compliance with the retention requirements of the Data Protection Act (DPA) 2018 and GDPR.

RECOMMENDATION(S): That Cabinet approves the revised Records Management Policy.

Financial Implications: The Records Management Policy does not have any financial implications itself rather the contrary if the DPA 2018 and GDPR are not complied with.

Legal Implications: Not complying with the DPA 2018 and GDPR would expose MDDC to enforcement action by the Information Commissioner's Office (ICO).

Risk Assessment: Approving the Records Management Policy reduces the risk of enforcement action by the ICO.

Equality Impact Assessment: No equality issues identified for this report.

Relationship to Corporate Plan: This policy supports good governance arrangements enabling confidence in delivery of the Corporate Plan.

Impact on Climate Change: There are no implications relating to Climate Change with this policy.

1.0 **Introduction**

1.1 One of the 6 basic principles of GDPR Article 5 (1) is that Personal data shall be:

e) Kept in a form that permits identification of data subjects no longer than is necessary for the purposes for which the personal data are processed.

1.2 A requirement of the DPA 2018 is that of logging; Section 62:

(1) A controller (or, where personal data is processed on behalf of the controller by a processor, the processor) must keep logs for at least the following processing operations in automated processing systems—

(a) collection;
(b) alteration;
(c) consultation;
(d) disclosure (including transfers);
(e) combination;

(f) erasure.

(2) The logs of consultation must make it possible to establish—

(a) the justification for, and date and time of, the consultation, and
(b) so far as possible, the identity of the person who consulted the data.

(3) The logs of disclosure must make it possible to establish—

(a) the justification for, and date and time of, the disclosure, and
(b) so far as possible—

(i) the identity of the person who disclosed the data, and
(ii) the identity of the recipients of the data.

(4) The logs kept under subsection (1) may be used only for one or more of the following purposes—

(a) to verify the lawfulness of processing;
(b) to assist with self-monitoring by the controller or (as the case may be) the processor, including the conduct of internal disciplinary proceedings;
(c) to ensure the integrity and security of personal data;
(d) the purposes of criminal proceedings.

(5) The controller or (as the case may be) the processor must make the logs available to the Commissioner on request.

2.0 The Policy

2.1 In accordance with current Data Protection legislation it is vital that records handling happens as part of a managed process and is logged. This is a new and significant requirement.

2.2 The existing policy is based on best practice.

3.0 Staff Changes and Activities

3.1 We have recently recruited a new Information Management Team who commenced work with MDDC on 4 July 2022.

- Data Protection Officer - Giovanni Wallace
- Information Management Officer – Ewan Girling

3.2 The Record of Processing Activities (RoPA) for the authority is currently under review.

4.0 Conclusion

4.1 That Cabinet approves the revised Records Management Policy.

Contact for more Information: Lisa Lewis, Corporate Manager Business Transformation and Customer Engagement (llewis@middevon.gov.uk)

Circulation of the Report: Cabinet Member, Leadership Team

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CABINET
4TH OCTOBER 2022

TIVERTON HIF/A361 JUNCTION

Cabinet Member(s): Cllr Richard Chesterton, Cabinet Member for Planning and Economic Regeneration
Responsible Officer: Richard Marsh, Director of Place.

Reason for Report and Recommendations:

To inform members of the latest position regarding the Tiverton HIF/A361 junction scheme and to seek decisions regarding next steps.

RECOMMENDATIONS FOR CABINET:

i) That Cabinet instructs officers to pause progression and delivery of the next phase (phase 2) of the A361 junction owing to cost increases which make the project unaffordable at this time.

ii) That Cabinet instructs officers to continue to engage with Homes England with a view to identifying alternative options to utilise the HIF funding in order to support the delivery of other aspects of the Tiverton EUE scheme and, if alternative options are identified, to progress these to a stage where a viable proposition can be brought back for consideration by Cabinet.

Financial Implications:

In 2019, Mid Devon District Council (MDDC) entered into an Agreement with Homes England, formally securing £8.2m of Housing Infrastructure Fund (HIF) grant money to support delivery of a new junction to the A361. This junction further improving accessibility to Tiverton, but also supporting the delivery of the significant housing development known as Tiverton Eastern Urban Extension (EUE). MDDC committed to the achievement of various milestones and outputs as part of the HIF agreement.

Since that time, MDDC and DCC (Devon County Council) have worked closely with Homes England to progress delivery of the scheme and HIF funding has been expended progressing the scheme. The funding spent or committed to date totals £552k, although MDDC benefits from indemnities from clawback provisions meaning that the money at risk from clawback by Homes England totals £234k.

DCC are the Council's delivery partner for the HIF scheme and the County Council is entitled to recover any project costs which it has incurred but not already received payment for.

The likelihood of clawback by Homes England is deemed to be quite low owing to the extensive effort that MDDC and DCC have committed to delivering the scheme, but the risk does remain.

A decision to pause the progression and delivery of Phase 2 of the A361 scheme (as set out within the recommendations) will mean that, unless a substitute project can be found which meets Homes England criteria, the Council will not be able to draw further HIF funding to support the Tiverton A361/EUE project. Although this does not have a direct impact upon Council financing – it is relevant in that it means that funding to support delivery of phase 2 of the works would have to be identified at a future date, with potential associated implications for future wider Council financing.
If the funding can be re-purposed and approval secured for this, some minor re-profiling of spend may be required.

No other financial implications are anticipated at this time.

Budget and Policy Framework:

The scheme has been supported by £8.2 million of Homes England Housing Infrastructure Fund (HIF) grant funding as referred to above. There are currently no Mid Devon District capital funds budgeted for this project.

This infrastructure scheme is a strategic project, supported through policy and benefitting from planning permission. Delivery of the junction supports the delivery of the Tiverton EUE development site – a key scheme identified within the adopted Local Plan to deliver new homes and meet identified housing need.

Construction of the first of two phases of the new junction off of the A361 to serve the Tiverton EUE development has been completed, with the first phase providing west-bound slip roads. Since then, the developers of the first phases of the EUE development (Redrow) have been working to deliver the link road which will connect the new junction to Blundell's road. Completion of the linking road has been delayed, but opening of the link road is currently expected in spring 2023.

Consideration has been given as to the scope for the Council to seek to borrow (via PWLB) to address the funding shortfall and deliver the works, however the scale of the funding gap means that the borrowing would be significant, especially in the current financial and economic climate. Borrowing to fund the 'gap' would add significant further financial pressures to the Council at a time of increasing economic and financial uncertainty and pressures and this approach is therefore not one which is considered prudent, and is not recommended.

Legal Implications:

There is a legal agreement in place with Homes England relating to the HIF funding and the Council is the accountable body for the projects. The grant funding agreement was signed on 29th November 2019. A deed of variation to the agreement was signed on 21st June 2021 and it updated key dates and the funding availability period in line with the project programme.

The HIF Agreement places the Council under a best endeavours obligation to realise the delivery of up to 1000 new homes (850 market/150 affordable) and to seek to re-coup the grant funding deployed to deliver the scheme through a S106 mechanism. The Council is then under a further obligation to seek to reinvest this funding in supporting the delivery of other housing delivery projects within the district.

The Agreement contains an agreed set of key milestone/completion dates – including completion of the project by September 2023. This date has been noted by the parties and it was agreed to keep this date under review, pending progress on interim milestones.

As set out above, the agreement includes provisions which allow Homes England to seek repayment of the grant monies expended – should it chose to. Although this places risk upon the Council, the risk of clawback is not deemed to be high as MDDC is in close liaison with Homes England on matters relating to the project and has acted in good faith/reasonably at all times with clear intent to deliver the project.

Again, it should be noted that the most recent works (works to relocate telecoms equipment and clear vegetation) also benefitted from an indemnity against claw-back from Homes England. This therefore removes the risk of claw-back of this element of cost.

Should Cabinet chose to approve the recommendations contained within this report, further discussions with Homes England will follow. The conditions set out within the existing agreement stand, and no material impacts to MDDC are envisaged as a consequence of approval of the recommendation – accepting those set out, above.

Should it prove possible to identify an alternative mechanism through which to utilise the balance of the HIF funding, further revisions to the funding agreement may be required and changes to the agreement will need to be negotiated between the parties once the situation is fully understood. No approval is sought through this report for any variations to the existing agreement.

Risk Assessment:

The Council does not currently have sufficient funding to enable the delivery of phase 2 of the A361 scheme within the required HIF timescale (completion by March 2024, latest) – either in accordance with the original plans, or based upon a reduced scheme. It does not appear likely that further grant funding will be forthcoming to support delivery. Borrowing from PWLB to fund the ‘gap’ would place an additional financial burden on the Council at a time of financial and economic pressures and is not a solution that is recommended. It is in this context that the recommendations are set before Cabinet. This approach is deemed to avoid exposing the Council to undue risk – either as a consequence of additional borrowing at a time of financial pressures, or as a consequence of committing to delivery of a scheme when a full funding package is not secured. Beyond the risk of clawback of an element of the HIF funding, no direct risk is identified as a consequence of the recommendations.

Clearly, an aspect of reputational risk does exist should the Council elect not to proceed with the works at this time – but this risk is deemed to be lower than progressing a scheme which is not fully funded, which the Council has to borrow heavily to fund when there is not an imperative for immediate delivery with potential implications for other council borrowing/schemes, or which is so heavily reduced in scale and quality that it fails to deliver key objectives.

As set out elsewhere within this report, the intention remains to deliver the phase 2 scheme and this decision is only seeking to pause delivery at this time owing to a lack of available funding. MDDC is not in a unique position in seeking to delay

delivery of this scheme in light of increasing construction costs – with many other schemes also being delayed, reduced or cancelled in light of insufficient funding.

Equality Impact Assessment:

This report recommends pausing a significant infrastructure project within the district, however no direct impacts are expected upon people/groups with protected characteristics.

Relationship to Corporate Plan:

This infrastructure project is considered to be important to enable development identified in the Local Plan to come forward and make a valuable contribution to delivering the priorities of the Corporate Plan 2020 to 2024; Economy, Homes, Community and Environment.
Pausing delivery of the scheme at this time does delay delivery of the project, but the intention remains to deliver the project and deliver key objectives as established within the corporate plan.

Impact on Climate Change:

Although this report recommends pausing delivery of phase 2 of the A361 scheme, the scheme is important to support the delivery of development as foreseen within the Local Plan. The Local Plan providing for sustainable development within the district up to 2033, as well as providing policies for the protection and enhancement of the natural and built environments.

Pausing delivery of this scheme may accrue Carbon benefits (directly and indirectly), although this is not considered to be a significant issue in the context of this report and some off-set of this benefit may result from some increased length of future journeys versus a situation where the new slip-roads are constructed.

1.0 INTRODUCTION/BACKGROUND

1.1 A report was brought before Cabinet in July 2022 in relation to the Tiverton HIF project. The report noted that a competitive tendering exercise, run by Devon County Council (DCC) on behalf of Mid Devon District Council (MDDC), had revealed that forecast construction costs for delivery of the 2nd phase of the new A361 junction scheme significantly exceeded the available budget.

1.2 In light of this, Cabinet approved two recommendations;

1. That the current tender process (being run by Devon County Council on behalf of MDDC) be stopped and that tenderers be notified that, owing to forecast construction costs exceeding the available budget, the Council will not be seeking to let a contract at this time. And;

2. That Cabinet instruct officers to continue to investigate additional funding opportunities and scope for project value-engineering,

working with key project partners including Devon County Council and Homes England, and that a further report be brought back to Cabinet as soon as possible.

1.3 Following on from the Cabinet approval, tenderers were notified that the Council(s) would not be letting a contract at that time.

1.4 Further work subsequently continued to consider whether additional funding could be secured to support the project and whether cost savings measures could be identified in order to reduce the cost of the scheme – making it both affordable and deliverable.

1.5 In terms of reducing the cost of the scheme; opportunities were identified which offered opportunities to reduce the cost of the scheme without negatively affecting the core objectives of the scheme. Specifically, these focused on the potential for the removal of one of the two new slip roads (the east/south bound on-slip) from the next phase of works (deferring this element for later delivery) and focused upon an alternative construction methodology which, subject to validation of it being a viable construction method, would reduce the need to import materials to address ground stability issues, thereby reducing construction cost estimates.

1.6 Initial work suggested that, although these two measures would not completely address the funding 'gap', they could go a significant way towards addressing it – leaving a more modest and manageable funding gap to be addressed/dealt with.
Discussions between MDDC and DCC confirmed a willingness from both Councils to consider further modest financial contributions in order to address this remaining gap, enabling delivery of the scheme.

1.7 It should be noted that concurrent work revealed the delivery programme to be challenging (noting the HIF spend deadline of March 2024) and that continued programme slippage represented a significant risk to the overall project.

1.8 As a consequence of this positive progress, it was agreed with Homes England that further technical work, including geo-technical analysis, would follow and Homes England agreed to consider the further funding of these works. The geo-technical works being required to validate the scope to utilise the alternative construction methodology, thereby generating the financial saving.

1.9 However, before this further technical work could progress, DCC flagged concern relating to further construction cost increases (inflationary pressures) which were rapidly eroding the scope for cost savings to be made on the scheme. DCC also confirmed that, owing to other organisational financial pressures, DCC was no longer in a position to be able to offer a further financial contribution to support delivery of the scheme.

1.10 As a consequence of both of these factors, the financial 'gap' (the gap between the available funding and scheme cost) for MDDC has again increased – the cost of the scheme having increased again through inflationary pressures, and the potential available funding having decreased. This puts MDDC back to a position whereby, should MDDC wish to progress the scheme, MDDC would need to find the whole 'gap' amount – this figure being likely to exceed £3m.

1.11 Homes England are appraised of this position and have again confirmed that no further HIF/Homes England funding is available to support delivery of this project at this time.

1.12 In light of this, consideration was given to what further options exist to support delivery of the scheme – i.e. through further scope reduction. Conversations have confirmed that, in the opinion of the project team, the project has reached the limit of reasonable scope reductions and that further reductions would undermine the purpose and value of the scheme. There are therefore no further practical measures to reduce scope, and therefore cost.

1.13 In light of this position, officers are of the professional opinion that it is now necessary to pause progression and delivery of the scheme (phase 2 of the A361 junction) owing to the fact that the Council does not have the funding to support delivery of the scheme at this time. The intention to deliver the scheme remains, and alternative funding sources can be identified/sought in the future in order to allow the future delivery of the scheme.

1.14 In terms of the practical short-term implications of this decision; no negative impact is foreseen relating to the delivery of new homes within the Tiverton EUE development, there being several years' worth of housing supply existing. This decision does not therefore have implications for the Council in terms of housing supply/housing trajectory, or the Local Plan. In the medium/long term, the intention remains to complete the scheme.

1.15 The recommendation to pause scheme delivery is not made lightly, and officers are aware that members and residents may have concerns around the recommendation, but there appears to be no viable solution to support scheme delivery in the immediate term. It should also be noted that MDDC is not the only council currently affected by spiralling construction costs – especially on infrastructure schemes – and many other projects are facing similar challenges, with many other schemes being delayed, mothballed or cancelled. Such news is now widely reported in local and regional press on a daily/weekly basis.

1.16 For information: officers have considered the revenue implications of seeking to borrow (from PWLB) to support delivery of the scheme by funding the 'gap', but the annual repayment figure (based on borrowing £3m over 25 years) equates to over £192,000. This would place a significant additional burden upon Council finances at a time of increased/increasing cost pressures and is therefore not felt to be

something which could be advocated by officers. This is reinforced by an awareness of current inflationary pressures which could further drive construction costs – presenting a significant risk that the funding gap could widen further.

1.17 As per the second recommendation set out for member consideration: officers seek approval to continue to work with Homes England (and DCC) to consider the scope to utilise the HIF funding to deliver alternative projects, closely linked to the Tiverton EUE scheme, which would unlock housing and which would support the delivery of wider place-making objectives.

1.18 It should be noted that Homes England do have specific requirements relating to the utilisation of HIF funding, and it will be necessary for alternative schemes to satisfy these key requirements in order to allow MDDC to deploy the funding on alternative projects/scheme components. However, officers do remain keen to explore options to seek to utilise the funding – the opportunity then existing to again seek to recoup the funding deployed (through S106 or other mechanisms) and re-circulate it to support the delivery of other key schemes/projects or to fund/part fund the delivery of phase 2 of the A361 junction at a point in time in the future.

1.19 If an alternative use of the funding cannot be identified which meets the requirements of Homes England, then the authority will not be able to draw down and utilise the remaining HIF funding and it will be necessary to formally communicate with Homes England to confirm that we are unable to utilise the funding in the manner originally foreseen owing to construction cost pressures and a lack of viable alternative options.

1.20 It should be noted that, as set out within previous reports, if the Council does not deliver (complete) the HIF funded scheme, there is the risk of Homes England seeking to clawback expended funding. To date, MDDC have utilised (spent/committed) £552k of HIF funding. However, MDDC also benefits from cost indemnities from Homes England in relation to some elements of work, meaning that MDDC's cost risk-exposure only totals £234k.

1.21 Although discussions with Homes England have not focused upon the possibility of Homes England seeking to recoup this funding – owing to the fact that it is hoped that conversations can continue focused on opportunities to re-purpose the funding – it is hoped that Homes England will not seek to recoup the element of funding that they are entitled to. This being virtue of the fact that MDDC officers have done everything within their power to keep Homes England informed of scheme progress, have worked extensively to identify solutions to deliver the scheme, and intend to continue to actively explore alternatives to ensure effective utilisation of the HIF funding.

1.22 Finally, it is again stressed that the decision to pause delivery of phase 2 of the A361 junction does not represent a departure from the

Council's intention to deliver the Tiverton EUE scheme and officers will continue to work to progress the scheme.

2.0 CONCLUSION

2.1 Further to the July Cabinet decision, officers have worked hard to identify additional funding and/or reduce the scope of phase 2 of the A361 HIF scheme to ensure the project can be delivered within budget and within necessary timescales, whilst also realising the original objectives of the project.

2.2 Despite the best effort of officers, it has not been possible to identify a scheme which is fully funded and therefore deliverable within the required timescales.

2.3 In order to avoid further abortive cost and time, is it therefore recommended that the project be formally paused and that officers seek alternative ways to utilise the HIF funding.

Contact for more Information: Richard Marsh, Director of Place

Circulation of the Report: Cllr Richard Chesterton, Cabinet, Leadership Team

Background Papers:

1. Tiverton HIF/A361 Junction Cabinet report – 12th July 2022.

ECONOMY PDG
29 SEPTEMBER 2022

NEW TIVERTON SHOPFRONT ENHANCEMENT SCHEME

Cabinet Member(s): Cllr Richard Chesterton, Cabinet Member for Planning and Economic Regeneration
Responsible Officer: Richard Marsh, Director of Place

Reason for Report: The purpose of this report is to inform Members about the new Tiverton Shopfront Enhancement Scheme launching in October / November 2022 and to request approval for the revised Scheme.

Recommendation: That the new Tiverton Shopfront Enhancement Scheme be approved and three Tiverton Ward Members be nominated to be part of the Funding Panel for the Scheme.

Financial Implications: There are no significant financial implications of continuing the Scheme as there is £31,314.50 funding committed and earmarked from a relevant S106 Agreement towards a shopfront enhancement scheme in Tiverton. There is a staffing resource requirement to administer the scheme which will be met through existing provision.
Approved by Finance: [*yes/no – include name/post title, eg Group Manager for Financial Services]*

Budget and Policy Framework: S106 funding is often negotiated as part of agreements for new retail developments that might have an effect on the town centre. The Mid Devon Economy Strategy includes the objectives of "towns and villages are vibrant, prosperous and have a positive atmosphere"; the shop front enhancement scheme will help to maintain the competitiveness of retailers within the town centre. It will also help achieve key outcomes for Place as outlined in the Economy Strategy.
Approved by Finance: [*yes/no – include name/post title, eg Group Manager for Financial Services]*

Legal Implications: The previous schemes have received approval from Legal Services and the revisions to this Scheme are minor changes that do not alter the main criteria and are in line with recommended best practice. Therefore, it is not considered that there are not any significant legal implications of continuing the Scheme.
Approved by Legal: *[yes/no – include name/post title, eg Group Manager for Legal Services]*

Risk Assessment: It is not envisaged that there are any significant risks with regard to continuing with this scheme. There is a risk that by not continuing with the shopfront enhancement scheme that the appearance of Tiverton town centre could be compromised and this in turn could affect the success of the local economy. The S106 money must be spent or contractually committed within ten years of receipt. The funding was received in 2021, so with nine years remaining, there is a low risk of the funding being returned. However, delays in delivering the scheme may have a negative impact on the Council's reputation.
Approved by Performance/Governance: *[yes/no – include name/post title, eg Group Manager for Performance, Governance and Data Security]*

Equality Impact Assessment: The grant guidelines and criteria protect applicants and the Council by ensuring a consistent and fair approach to all applications based purely on the strength of the Scheme rather than anything relating to the applicant.

Relationship to Corporate Plan: This supports the Corporate Plan priority of 'Economy', in particular: "Identify strategic and tactical interventions to create economic and community confidence and pride in the places we live. This includes a continued focus on Town Centre Regeneration".

Impact on Climate Change: No direct impacts anticipated.

1.0 Introduction/Background

1.1 It is recognised that the visual attractiveness of a town centre is an important element in consumers' choices about where to shop and spend leisure time. The state of repair and decorative condition of shopfronts is an important element of this visual impact and therefore a major contributor to a town's vitality and economic success.

1.2 Over the past few years, the Council has administered several shopfront enhancement schemes across the District: in Crediton (2002-2005) as part of a Heritage Economic Regeneration Scheme, in Cullompton (2011-present) as part of a scheme to support the regeneration in the town centre and more recently as part of the Heritage Action Zone project, and in Tiverton (2015-2020) as part of the High Street Innovation Fund. Tiverton's previous scheme ended when the funding was fully awarded in 2020. A report came to Economy PDG in January 2019 supporting the reinstatement of shopfront enhancement schemes for the three main market towns in the District. We have a current scheme running in Cullompton under the Heritage Action Zone programme, we will launch the scheme in Tiverton later this year and assuming the UK Shared Prosperity Fund Bid is approved, there are plans to also launch a similar scheme in Crediton.

1.3 The Growth, Economy and Delivery Team recognises the value of shopfront enhancement schemes in maintaining the visual attractiveness of town centres, supporting the preservation of conservation areas and as a means of engaging with business owners and encouraging them to update and redecorate their properties at a time when they are potentially experiencing financial difficulties and therefore less likely to invest in their properties. With businesses still recovering from the impact of the pandemic, the economic challenges facing retailers are increased further with the recent inflation rises and the subsequent cut on spending due to customers having less disposable income. Therefore, it is even more opportune to launch this scheme to support our businesses.

1.4 Funding has been earmarked from existing S106 provision for Tiverton to support a renewed Shopfront Enhancement Scheme. We will be ready to relaunch the scheme in October / November 2022, which will then run until March 2025.

It aligns and compliments the proposals outlined in the UK Shared Prosperity Fund bid, which will see a number of schemes launched under the 'Love your Town Centre' banner in each of the three towns, with the common objective of revitalising our town centres.

2.0 Scheme Process and Criteria

2.1 Using experience and feedback from the previous schemes, we have updated the criteria for Tiverton Shopfront Enhancement Scheme (formerly known as the Shopfront Facelift Scheme) to bring it in line with other similar grants and practice under the Love Your Town Centre Scheme. The main criteria points are highlighted below:

- The scheme will offer a single grant of up to £2,500 with the requirement for 50% match-funding of the total project costs.

- There will be an open-application style approach with no set deadlines throughout the year, meaning applications will be determined on their own eligibility and merit on a first-come, first-served basis. This is in anticipation of heavier demand in year one and ensuring we can maximise the benefit of the scheme quickly and support as many businesses as possible at the time of their need. However, as the Scheme is intended to run for three years, we will cap the Scheme initially to £15,000 in year one and then review the cap for year two.

- Particularly in response to previous requests from businesses and feedback from Members, we are extending the Scheme to allow applications from upper-floor/basement businesses to improve their signage and visibility from the front of the building. Therefore, instead of just 'shopfronts', the Scheme will now support enhancement work for anything that faces the street as long as it has a street-level repair need and relates to the commercial usage of the building. In some cases, the rear of buildings are the sides that face the street, therefore applications will be determined on a case-by-case basis against this criteria.

2.2 The launch of the Scheme will follow a Communication Plan to ensure that the businesses within the Town Centre boundary are informed.

2.3 As with the previous Scheme, a Funding Panel will be set up consisting of the Scheme Administrator (the Growth and Regeneration Officer for Tiverton), a Conservation Officer (or other suitable representative) and three Tiverton Ward Members. The role of the Panel is to ensure that decisions are made in accordance with the criteria and to act as ambassadors for the Scheme in Tiverton.

2.4 Following the end of each financial year, a summary report outlining how the funding has been used will be presented to the Economy PDG for their information.

2.5 The Growth, Economy and Delivery Team is therefore seeking approval for the new Scheme and the nomination of three Member representatives to sit on the Panel.

Contact for more Information: Zoë Lentell, Growth and Regeneration Officer, 01884 234298, zlentell@middevon.gov.uk

Circulation of the Report: Cabinet Member seen and approved [yes/no – name of Cabinet Member], Cabinet, Leadership Team seen and approved [yes/no]

List of Background Papers:

- New Tiverton Shopfront Enhancement Scheme Criteria
- Tiverton Town Centre Boundary Map

Mid Devon District Council

TIVERTON
SHOPFRONT ENHANCEMENT

GRANT
SCHEME CRITERIA

THE SCHEME

The Council has allocated funding for the purpose of making grants towards the cost of improving commercial buildings within Tiverton Town Centre. These notes are for the guidance of applicants seeking such assistance under the scheme.

1 Eligible Buildings and Applicants

1.1 Buildings eligible for grant assistance from the Council are commercial buildings that are situated within Tiverton Town Centre within the area on the attached map.

1.2 Applicants may be either the freehold owner or lessee; short hold tenants may also apply. Tenants of District Council-owned premises are eligible for grant assistance only where the proposed work is not the responsibility of Mid Devon District Council as landlord.

1.3 Small or micro businesses are eligible and all charities and social enterprises. Retail, cafés, restaurants, pubs, financial/ professional services, tourism and leisure are eligible. Other cases will be considered on their merits.

1.4 As long as individual buildings meet the eligibility criteria, there are no rules limiting a) the number of buildings owned by a single landlord within the town or b) the number of buildings within a street or area of the town centre to receive a grant. Every application for a separate shop-front unit will be looked at on its own merits.

1.5 This is a limited pot of funding, therefore to ensure the funding helps as many distinct shopfront units as possible, applications for repeat funding within 3 years of a previous shopfront grant award by the same business for the same unit are unlikely to be successful.

2 Eligible Works

2.1 Tiverton Shopfront Enhancement Grant Scheme is a limited scheme for the enhancement and regeneration of Tiverton Town Centre. It focuses on painting, decorating, fascia repairs and signage improvements, guttering and lighting improvements etc with the end aim of enhancing the appearance of the town centre.

2.2 The small grant scheme will normally cover painting, minor repairs or signage.

2.3 Applications from upper-floor/basement business occupants can be allowed. Repairs for shopfronts should be for anything that faces the street as long as it has a street-level repair need and relates to the commercial usage of the building

2.4 Retrospective applications for work already started or completed are not eligible for funding under this Scheme.

2.5 The decision as to whether any works proposed are eligible for grant shall be at the sole discretion of Mid Devon District Council.

Mid Devon DISTRICT COUNCIL

3 Amount of Grants

3.1 The scheme will offer grants of 50% of the total eligible estimate, up to a maximum of £2,500 per property (total spend £5,000).

3.2 Total project costs must not include VAT that is recoverable. Statutory fees (eg Planning Application fees) are not eligible costs for funding (although can be included in total project costs).

4 Application for Grant

4.1 The application for grants must be completed online via the Council's website [INSERT LINK]. Upon submission, a unique application reference number will be provided on screen.

4.2 The following supporting papers are required to complete the application. Please email the following, quoting the submission reference, to: businessgrants@middevon.gov.uk:

(a) A schedule of the proposed work.
(b) Three itemised estimates.
(c) Recent detailed photographs of the building/item to be repaired.
(d) Plans showing the proposals (where appropriate).
(e) Copy of any required planning permission, listed building consent or advertisement consent.

4.3 Applicants should provide a minimum of three competitive contractor's quotations (or evidence that they have sought three quotes) if the total contracted works with a single supplier is more than £2,500. In the case of specialised work, one or two quotes may sometimes be acceptable. The contractor's quotations must be itemised to show individual costs for each item of work, making due allowance in the form of realistic provisional sums for dealing with hidden anticipated defects. Any figure for VAT should also be shown separately.

5 Decision on the Application

5.1 Mid Devon District Council shall not be bound by any commitment entered into by an applicant prior to the notification of a decision on his application.

5.2 No application for grant will be determined until such time as any necessary permission, approval or consent required under the Town and Country Planning Acts and/or any approval under the Building Regulations has been obtained.

5.3 Upon receipt of applications (with full supporting paperwork including any consents/permissions required), applicants should receive a funding decision within 28 days of submission. Notwithstanding the fact that an application for grant is made correctly and in respect of an eligible building, the District Council shall not be under any obligation to make a grant and any decision to make a grant shall be entirely at the discretion of the District Council.

5.4 In the event of a grant being approved, the offer of grant must formally be accepted by or on behalf of the applicant in writing. The letter of acceptance must be received by the District Council before any works are commenced.

6 The Work

6.1 All grant awards are conditional subject to the work being carried out to a satisfactory level. The work should be undertaken by the applicant strictly in accordance with the schedule of works as approved by the District Council, including any conditions attached thereto, within the period specified by the Council.

6.2 The Officers of the Council shall have the right, at all reasonable hours, to inspect any work which has been approved for grant assistance both during the time that work is being carried out and after it has been completed.

6.3 The contractor must ensure that all work is carried out in accordance with the requirement of current Health & Safety legislation. Failure to comply with the Regulations may mean that the Officers are unable to inspect the work and this may prejudice payment of the grant.

7 Payment of Grant

7.1 Soon after completion of the eligible works the applicant may request that the works are inspected by the local authority. Following a satisfactory report the applicant shall return to the District Council the notification of completion of work certificate enclosing copies of the receipted account(s) for the work.

7.2 The grant will not become payable until the work has been completed to the satisfaction of the District Council. As part of the grant offer, the applicant must return a completed works certificate (and invoice for grants over £2,000) within 12 months of offer date.

For enquiries about the Scheme, contact the Project Officer via: businessgrants@middevon.gov.uk

Mid Devon DISTRICT COUNCIL

TIVERTON SHOPFRONT ENHANCEMENT

GRANT SCHEME GUIDANCE

Aims of the scheme

To encourage shop owners to upgrade, repair and refurbish shopfronts in Tiverton Town Centre in order to emphasise both the individuality of the business premises and where appropriate the historic character of the town centre.

Eligible works

Whilst only a few complete historic shopfronts remain in the town there are many that retain a range of traditional features. Where original features exist the scheme seeks to reveal these where hidden behind later works, get appropriate repairs carried out, to get the refurbished and repaired frontages painted and to get good quality traditional signage installed.

Where modern shopfronts exist in historic buildings total replacement with a more appropriate design would also be eligible for grant aid.

See drawing below for elements making up a typical shopfront

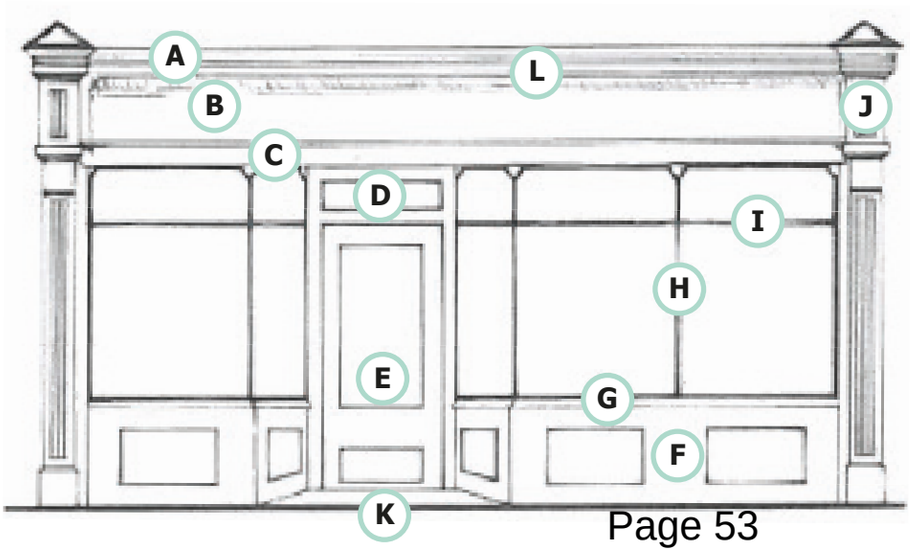
Stallrisers

These are usually masonry either rendered or with a decorative finish including natural stone, tiles or timber panels and will depend upon the age and style of the shopfront. Appropriate repair or reinstatement would be eligible for grant aid.

Windows and doors

Traditional windows may be framed in timber or ornate cast iron with transoms and mullions to match. Glass is normally clear but may incorporate stained glass panels above the transoms. Doors will normally be timber with a glazed panel and reflect the proportions of the stallriser to window with a fanlight above in line with any transom.

Repair of existing traditional elements and replacement of later inappropriate alterations would be eligible for grant aid.



- A Cornice
- B Fascia
- C Blind Box
- D Fanlight
- E Panelled Door
- F Stallriser
- G Cill
- H Mullion
- I Transom
- J Pilaster and Corbels
- K Tiled Recess
- L Blind Box

Tiled entrances

Mosaics of coloured tiles and other decorative use of tiles is a particular feature of recessed shop entrances in the town. Most are in good condition but where repair or refurbishment is needed grant may be available as part of works to the shop front. Where there is a shop with a recessed entrance that does not currently have tiling, incorporation of a tile mosaic in the local style could be incorporated and be eligible for grant aid.

Pilasters and corbels

These features are normally timber with decorative detailing such as fluting. The base of pilasters often suffer rot due to surface water and blocked gutters or broken downpipes. Grant aid would be available for repair or like for like replacement of these traditional features.

NB Where damage has occurred as a result of poor maintenance of gutters and downpipes remedial work to these to avoid future damage will be required as a condition of repairs to joinery but will not normally be eligible for grant aid.

Fascias

The fascia board should be in scale with and respect the other architectural features of the shop front. The grant scheme is intended to encourage removal of later fascias that are of inappropriate modern materials and / or fail to reflect the existing traditional detailing, and to restore fascia details in harmony with the features and proportions of the shopfront.

Blinds and canopies

Where historic box blinds or roller canopies exist their retention and refurbishment will be assisted by provision of grant aid. This would be available for new fabric, overhaul of mechanisms and the box or housing for the blind. Consideration may also be given to installation of new blinds where these would replace inappropriate modern blinds.

Signage including brackets for hanging signs

Good quality signs can make an important contribution to the vitality of shopping areas. Signwriting on painted timber fascias, or application of suitable style individual letters to the fascia would be included as eligible works. In the case of hanging signs the use of existing historic metal brackets may attract grant aid for repairs. New hanging signs can be conventional 2 sided handpainted timber or could be three dimensional objects to reflect the type of business. Other types of good quality hanging signs may also attract grant aid.

For further design information contact the Conservation Officer Tel: 01884 255255

CABINET

4TH OCTOBER 2022

REPORT OF THE DIRECTOR OF PLACE

CREDITON NEIGHBOURHOOD PLAN

Cabinet Member(s): Cllr Richard Chesterton, Cabinet Member for Planning and Economic Regeneration

Responsible Officer: Richard Marsh, Director of Place

Reason for Report: To make (adopt) the Crediton Neighbourhood Plan in order to meet the requirements of the relevant Acts and Regulations.

RECOMMENDATION:

That Cabinet recommends to Council that:

- **the Crediton Neighbourhood Plan (Appendix 1) is 'made' (adopted) and brought into force as part of the statutory development plan for the Crediton area.**

- **the Crediton Neighbourhood Plan Adoption Decision Statement (Appendix 2) is published to meet the publicity requirements in the Regulations.**

Financial Implications: There are no direct financial implications from adopting the Crediton Neighbourhood Plan.

Legal Implications: Changes made to section 38 of the Planning and Compulsory Purchase Act 2004 (through provision 3 of the Neighbourhood Planning Act 2017) mean a neighbourhood plan attains the same legal status as a local plan (and other documents that form part of the statutory development plan) once it has been approved at a referendum, rather than when it is made (adopted) by the relevant authority. At this point it comes into force as part of the statutory development plan. Applications for planning permission must be determined in accordance with the development plan, unless material considerations indicate otherwise. Policies of the Neighbourhood Plan will be used alongside policies in the adopted Mid Devon Local Plan, the Devon Minerals and Waste Plans, to help guide planning applications submitted to the Council for determination and the decisions made on these. There is a need for the Council to 'make' (adopt) the Crediton Neighbourhood Plan, following its local referendum, under Section 38A (4) of the Planning and Compulsory Purchase Act 2004 (as amended) and to publish a statement setting out the decision and the reasons for making this decision under the Regulation 19 of the Neighbourhood Planning (General) Regulations 2012.

Risk Assessment: None identified.

Budget and Policy Framework: No direct budget implications. Now that the Neighbourhood Plan has been approved by referendum, it forms part of the

Council's policy framework for decision-making purposes on land use planning matters.

Equality Impact Assessment: The Council has previously determined that 'the Plan, as modified, meets the basic conditions as set out in paragraph 8(2) of Schedule 4B to the Town and Country Planning Act 1990'. Therefore, the Council has concluded that the 'making of the order (or neighbourhood plan) is in general conformity with the strategic policies contained in the development plan for the area, which were subject to a full Equalities Impact Assessment. On this basis, the Crediton Neighbourhood Plan will not in itself lead to any impacts on the equality strands protected under the Equality Act 2010 (the "protected characteristics") over and above those considered and addressed through the Local Plan Equalities Impact Assessment.

Relationship to Corporate Plan: now that it has been approved by referendum, the Crediton Neighbourhood Plan forms part of the statutory development plan for Mid Devon and the strategy for guiding new development in the district, allocate sites for housing and economic development, the provision of infrastructure, as well as policies for the protection of the environment and managing development. The plan will help meet the Corporate Plan priorities: 'Homes', 'Environment', 'Community' and 'Economy'.

Impact on Climate Change: The preparation of development plans is a key method for climate change mitigation and environmental protection, through appropriate policies and development strategy.

1.0 Introduction/Background

About neighbourhood plans

1.1 The Localism Act 2011 and Neighbourhood Planning (General) Regulations 2012 (as amended) introduced powers to allowing qualifying bodies (parish councils, or neighbourhood forums in areas without parish councils) to produce neighbourhood plans and Neighbourhood Development Orders. Neighbourhood planning gives communities direct power to develop a shared vision for their neighbourhood and shape the development and growth of their local area. They are able to choose where they want new homes, shops and offices to be built, have their say on what those new buildings should look like and what infrastructure should be provided, and grant planning permission for the new buildings they want to see go ahead. Neighbourhood planning provides a powerful set of tools for local people to plan for the types of development to meet their community's needs and where the ambition of the neighbourhood is aligned with the strategic needs and priorities of the wider local area.

1.2 Mid Devon is a fully parished district, where parish councils can choose to prepare a neighbourhood plan and can work with other members of the community who are interested in, or affected by, the neighbourhood planning proposals to allow them to play an active role in preparing a neighbourhood plan or Order.

1.3 There are currently six designated neighbourhood areas in Mid Devon, for which the preparation for Neighbourhood Plans has reached various stages.

- Cullompton Neighbourhood Plan – adopted / 'made' 1st July 2020
- Tiverton Neighbourhood Plan – Decision Statement approved in September 2022, awaiting local referendum in late 2022.
- Silverton Neighbourhood Plan – Regulation 14 stage draft plan.
- Willand Neighbourhood Plan – Neighbourhood Area designated in February 2022. Draft plan currently being prepared.
- Newton St Cyres Neighbourhood Plan – Neighbourhood Area designated December 2021.
- The Crediton Neighbourhood Plan, awaiting decision to 'make' (adopt) following a local referendum - which is the subject of this report.

The role of the Council

1.4 The Council, as the Local Planning Authority must take decisions at key stages in the neighbourhood planning process and within specified time limits, and has a duty to provide advice or assistance to a parish council as it considers appropriate for the purpose of, or in connection with, facilitating the making of proposals in relation to the neighbourhood plan. This includes providing comments on 'general conformity' of the neighbourhood plan policies with the strategic policies of the Local Plan, advising on neighbourhood plan requirements (including Strategic Environmental Assessment 'SEA' and Habitat Regulations Assessment 'HRA'), undertaking post-submission consultation on the neighbourhood plan (Regulation 16 consultation), the appointment of an independent examiner, making arrangements for the referendum, and bringing the neighbourhood plan into force.

1.5 This report seeks Council approval to bring the neighbourhood plan into force through its formal adoption i.e. that the Crediton Neighbourhood Plan is 'made'.

2.0 Crediton Neighbourhood Plan

About the Plan

2.1 The Crediton Neighbourhood Plan has been prepared by Crediton Town Council and its neighbourhood planning group and the period to which it relates is 2018 – 2033.

2.2 The Crediton Neighbourhood Plan includes:

- A vision statement for Crediton
- 8 sections:

New Development; Community and Facilities; Town Centre; Transport; Sustainability; Employment; Heritage, Environment.

Each section has aims and objectives and the neighbourhood plan includes 34 policies covering a range of planning matters. The neighbourhood plan recognises that Crediton is expected to have less development and fewer houses than Tiverton or Cullompton, and accepts the development allocations proposed by the adopted Mid Devon Local Plan.

Examination

2.3 The Crediton Neighbourhood Plan has been subject to an independent examination. The Examiner's report has concluded that, subject to the recommended modifications, the Crediton Neighbourhood Plan met the basic conditions and can proceed to a Referendum in the Crediton Neighbourhood Area (Crediton parish).

Referendum

2.4 On the 12th July 2022 (minute 27) the Council's Cabinet agreed that the Crediton Neighbourhood Plan (subject to the Examiner's modifications and a typographical correction) proceed to a local referendum, and that a Decision Statement be approved. The Decision Statement was published on the Council's website and to meet the publicity requirements in the Regulations.

2.5 The local referendum for the Crediton Neighbourhood Plan was held on Thursday 22nd September 2022.

2.6 In accordance with the Neighbourhood Planning regulations the referendum asked persons eligible to vote within the neighbourhood plan area (Crediton Parish) the following question:

"Do you want Mid Devon District Council to use the neighbourhood plan for Crediton to help it decide planning applications in the neighbourhood area?"

2.7 The result of the referendum was as follows:

Ballot papers	Votes Recorded
Number cast in favour of a Yes	719
Number cast in favour of a No	94
Number of spoilt ballot papers	0
Total number of votes cast	813
Electorate: 6173	Turnout: 13 %

2.8 Since 88.4 % of voters are in favour of the Crediton Neighbourhood Plan the plan becomes part of the statutory development plan for the area and the Council must bring it into force through the plan being 'made' (adopted).

3.0 Adoption of the Neighbourhood Plan

3.1 In accordance with Section 38(4) of the Planning and Compulsory Purchase Act 2004 (as amended) and regulation 25A of The Neighbourhood Planning (General) Regulations 2012 (as amended), the Council must make (adopt) the Plan as soon as reasonably practicable after the referendum is held and, in any event, not later than the last day of the period of 8 weeks from the day after the referendum is held.

3.2 However, the Council may refuse to make the Plan if it considers that making it would be a breach, or would otherwise be incompatible with, any EU obligations or any human rights obligations. Council officers hold the view that the making of the Plan would not breach these obligations (as set out within the Council's Decision Statement). The Council must decide whether to make, or refuse to make, the Plan. There is no opportunity at this stage to seek to amend the contents of the plan or make further representations to it.

3.3 It is recommended that the Plan is 'made' and the Adoption Decision Statement (**Appendix 2**) is published to meet the publicity requirements in the Regulations.

4.0 Groups Consulted

4.1 None. There has been no need to consult the Planning Policy Advisory Group on the decision to adopt the Crediton Neighbourhood Plan following its successful referendum.

5.0 Next steps

5.1 The Crediton Neighbourhood Plan (**Appendix 1**) and the Adoption Decision Statement (**Appendix 2**) will be published on the Council's website and made available to the public.

5.2 Crediton Town Council will be responsible for any future review of the Crediton Neighbourhood Plan, although there is no requirement to review or update a neighbourhood plan.

5.3 Requests for printed copies of the Crediton Neighbourhood Plan should be made to Crediton Town Council.

Contact for more Information: Tristan Peat, Forward Planning Team Leader, 01884 234344 tpeat@middevon.gov.uk

Mojca Sonjak, Forward Planning Assistant msonjak@middevon.gov.uk

Circulation of the Report:

Councillor Chesterton - Cabinet Member for Planning and Economic Regeneration

Leadership Team, Legal Services, Finance and Equalities

List of Background Papers and relevant links:

Appendix 1 - Crediton Neighbourhood Plan referendum version

Appendix 2 – Crediton Neighbourhood Plan – Adoption Decision Statement

Crediton Draft Neighbourhood Plan September 2021 (Referendum Version)

2018-2033 June 2022

Crediton Neighbourhood Plan

Contents

Appendix 2: plan statements

Appendix 3

Supporting documents online

www.creditonnp.co.uk

Crediton Neighbourhood Plan Design Guide

Community consultations

Crediton Town Council household survey 2015

Business survey 2015

Queen Elizabeth Academy School survey 2015

Primary Schools survey 2015

The following documents have informed the development of this plan:

Crediton Flood Resilience Group leaflet 2016

Sustainable Crediton Seminar Jan 2012

Devon Association for Renewable Energy: Crediton Community Renewable Energy Feasibility Study, 2015

The following statutory documents have informed the development of this plan

National Planning Policy Framework (NPPF) February 2019

National Planning Policy Guidance

MDDC Air Quality Management Plan 2006

MDDC Annual Air Quality Status Report 2018

MDDC Strategic Flood Risk Assessment 2014

MDDC Town Centre Retail Survey 2012

MDDC Landscape Character Assessment 2011

MDDC Town and Village Character Assessment 2012

MDDC Crediton Conservation Area Appraisal 2003

Devon County Historic Environment Record—Historic Market and Coastal Towns Survey 2016

Comments are invited on this plan until Monday 10th June 2019. They may be sent to:
Crediton Neighbourhood Plan Steering Group,
Crediton Town Council Offices,
8a North Street, EX17 2BT
Or emailed to: townclerk@crediton.gov.uk

Forward

Crediton is a small market town (pop. 7,835 2011 census) in the west of the district of Mid Devon, situated between the rivers Yeo and Creedy. High grade agricultural land surrounds it; the farming communities and villages look to the town for local services and these communities continue to be important to its economy. In return, the tranquillity of our rural surroundings of green hillsides and river floodplains is one of the qualities most valued by residents.

All our research and consultation for this plan show that we are a strong community with a sense of identity and a commitment to growing as a sustainable

town, with pleasant built and open environments where people will be pleased to live, work and spend their leisure time. This plan represents this vision and priorities.

Land use policies are not just about housing estates and industrial sites. They also include ensuring social spaces, green spaces and respecting our heritage. Polices in this document therefore aim to strengthen all the positive aspects of the town, to integrate the new within it, and to create a healthier and more sustainable community that works for everyone.

Sometimes, planning is seen as a discredited process, creating car-dependent estates where residents have little need or opportunity to relate to other parts of the town or to each other. Like other communities, we need to face the reality of health and well-being challenges. Nearly 30% of residents over 16 are overweight or obese [1]. Depression and anxiety figure highly as mental health issues for young people [2] and loneliness is a factor across the age ranges.

Planning can impact on all aspects of our lives, how we live and how we feel. 'Improving wellbeing was at the heart of the original mission of planning. But the planning system has lost its way… A wellbeing approach can help planning to rediscover its sense of purpose'.[3] We have high expectations of the contribution that good planning can make to our town.

We would like to thank all those who have responded to surveys, consultations and sent in comments; all the Crediton schools for enabling students to take part; organisations and individuals who have given advice on specialist areas.

Crediton Neighbourhood Plan Steering Group

[1] NHS Locality stocktake Jan-June 2018
[2] Healthwatch Devon, Crediton Health and Well-being Hub, Youth Engagement Report 2015
[3] 'Well being in four policy areas' Report of the All-Party Parliamentary group on Wellbeing Economics

1 Introduction to the Plan

The Plan Context

A Neighbourhood Plan is a relatively new addition to the planning system that was introduced as part of the Localism Act (2011). It allows a community to add local detail to national planning policies and the district planning policies which are laid out in the Local Plan. A Neighbourhood Plan can be specifically tailored to the needs of the community that creates it but we can't just do what we like. Whilst we must consult our community for its views, our plan must also conform with national, and district polices.

National policies are presented in the National Planning Policy Framework. (NPPF) Its emphasis is on sustainability. Our plan must show how it contributes to sustainability and national policy strongly supports it. People sometimes wonder what the term means. The NPPF has this definition:

'The purpose of the planning system is to contribute to the achievement of sustainable development. At a very high level, the objective of sustainable development can be summarised as meeting the needs of the present without compromising the ability of future generations to meet their own needs' NPPF 2019

The Local Plan is created by Mid Devon District Council and applies across the whole mid-Devon district. It too must conform to national planning policy.

The following paragraphs explain in detail:

- the legal status of Neighbourhood Plans;
- how our Neighbourhood Plan relates to district and national planning policies;
- why we have chosen to develop a Neighbourhood Plan for Crediton;
- how we have done it and our overall approach;
- our vision, aim and objectives for what we are trying to do through this plan.

1.1 Neighbourhood Plans in law

The 2011 Localism Act gives local communities the power to produce their own neighbourhood plans which will influence future development in their local area.

Such plans are focused on shaping the built environment and can:

- Identify a shared vision and common goals for a neighbourhood.
- Influence what new buildings should look like and set design standards.

A Neighbourhood plan must fulfil Basic Conditions to ensure that it is in conformity with national planning policy and district local plans.
Once made, a Neighbourhood Plan has legal status. It is a document that then guides development in a neighbourhood and stands alongside national and district planning policy documents.

1.2 National Planning Policy

The NPPF interdependent objectives in planning for sustainable development are:

An economic objective- to help to build a strong, responsive and competitive economy, by ensuring that sufficient land of the right types is available in the right places and at the right time to support growth, innovation and improved productivity; and by identifying and coordinating the provision of infrastructure;

A social objective – to support strong, vibrant and healthy communities, by ensuring that a sufficient number and range of homes can be provided to meet the needs of present and future generations; and by fostering a well-designed and safe built environment with accessible services and open spaces that reflect current and future needs and support communities' health, social and cultural wellbeing; and

An environmental objective – to contribute to protecting and enhancing our natural, built and historic environment; including making effective use of land, helping to improve biodiversity, using natural resources prudently, minimising waste and pollution, and mitigating and adapting to climate change, including moving to a low carbon economy

Our plan is strongly focused on sustainability throughout so the above principles have been applied to our choice of policies.

1.3 District Planning Policy

Mid Devon District Council - The Local Plan

The previous Mid Devon Local Plan included three parts – Core Strategy adopted July2007, Allocations and Infrastructure Development Plan Document adopted January 2011, and the Local Plan Part 3 Development management policies adopted October 2013. This was accompanied by a Policies Map which was adopted October 2013. It allocated development across the whole of Mid Devon District, including Crediton where most development was located to

the north east of the existing settlement area. As circumstances change, plans need to be revised and updated. The District Council adopted the Mid Devon District Plan Review in July 2020 to cover the period 2013-2033. The plan brings forward sites that are deliverable within the plan period.

Development in Mid Devon focuses on the M5 corridor, specifically with extensive residential and economic development at Junction 28 and economic development at Junction 27. The towns of Cullompton and Tiverton are both planned to have significant housing development over the plan period.

A Neighbourhood Plan can put forward more sites for development but it cannot propose fewer than in the Local Plan. Because of its topography and other environmental constraints, Crediton is expected to have less development and fewer new houses than Tiverton and Cullompton. The Neighbourhood Plan accepts the development allocations identified in the adopted Mid Devon District Plan Review. For the purposes of the Neighbourhood Plan, the settlement limit and land allocations shown on the Proposals Map for Crediton which accompany the adopted Mid Devon District Plan Review are carried forward and used in the NP.

1.4 Neighbourhood Planning Policy

Crediton Town Council - the Neighbourhood Plan

Why have a Neighbourhood Plan for Crediton?

Crediton Town Council has regularly held consultation events since 2009. These events enabled us to create a Town Plan in 2011 which identified clear issues within the town. Many of these issues remained unresolved years later with no planning route to resolve them. The lack of legal status of the Town Plan had meant that the wishes of the town were being overlooked when planning applications were assessed. In 2013, the town council therefore took the decision to create a Neighbourhood Plan which would become a legal planning document for the town.

The Neighbourhood Plan Designated Area:

The town council, as the 'qualifying body' and authorised for the purposes of neighbourhood planning, applied to Mid Devon District Council on 20th February 2014 to designate the Neighbourhood Area, as required by Part 2, Regulation5 of The Neighbourhood Planning (General) Regulations 2012. Following a public consultation period of at least 6 weeks, our Neighbourhood Area was formally approved by Mid Devon District Council on 2nd July 2014. The approved Neighbourhood Area is the same as the parish boundary of the Town and is shown as figure 1 (Page 11).

What does the plan do?

Our plan represents the community's vision and priorities for how they would like to see Crediton develop over the plan period to 2033. It sets out planning policies against which development coming forward in the town, will be considered – helping to shape the town and reflect the community's aspirations.

Policies contained within a Neighbourhood Plan, once 'made', form part of the development plan for the area and applications for planning permission must be considered in accordance with these policies, unless material considerations indicate otherwise.

Community Engagement and Consultation

The Plan has been developed through extensive community engagement with residents, schoolchildren and students, businesses, community groups and organisations. For details, please see the Consultation Statement that will be produced following this consultation and that will accompany the draft plan when submitted to the Local Planning Authority at Part 5, Regulation 15 of The Neighbourhood Planning (General) Regulations 2012. Since these policies have been produced through extensive consultation with the residents of the town, development will meet the needs of our community for the plan period.

2 Guiding principles underpinning the Neighbourhood Plan for Crediton

Community cohesion

Crediton's strong sense of community sets it apart. It engenders the community spirit that residents say is an essential part of their life in the town. Social activities create opportunities for community cohesion. This plan aims to integrate new developments into town life in both social and planning terms. Connectivity is a key theme in this plan to continue and enhance community cohesion.

Community involvement

This Neighbourhood plan has been drawn up with participation from all sections of the population in the belief that everyone has the right to be involved in the future development of their town. Going forward, we aim to be a town that actively involves local residents and businesses in shaping it and in the on-going process of plan making, monitoring and delivery.

Sustainability

Crediton people care a lot about the town environment: we value the rural setting of the town, the parks, open spaces and seasonal planting around the town. We notice degradation of the environment from litter to loss of green spaces. In particular, we notice the effects of heavy traffic in the town centre – noise, smell and air pollution. Pollution of our town leads to chronic ill health, which is unsustainable in the long term. Dealing with litter and waste is expensive and much of what is thrown away is reusable or recyclable. Using more energy than we need is expensive for everyone as well as affecting our environment.

The term ‘sustainability’ includes but goes beyond these more visible effects on the environment. The UK Sustainable Development Strategy *Securing the Future* (2005) sets out five features of sustainable development:

living within the earth’s environmental limits,
ensuring a strong, healthy and just society,
achieving a sustainable economy,
promoting good governance,
using sound science responsibly.

See also our Sustainability Statement, Appendix 2 (page 60)

More widely, the Neighbourhood plan sits in the context of international efforts (through the Paris Climate Accord) and national commitments (through the 2008 Climate Change Act) to keep global temperature rises to below 2 degrees Celsius this century and to reduce carbon emissions by 80% by 2050 respectively.

A summary of the steps we have taken to achieve this plan

2013 Crediton Town Council agreed to produce a Neighbourhood Plan

2014 Mid Devon District Council approved the Neighbourhood Plan area

The town council set up a Neighbourhood Plan Steering Group

2015 The Neighbourhood Plan Steering group and volunteers conducted surveys

2016 The Steering group produced and publicised the Vision and Objectives for the plan
Specialists and interest groups were consulted for specific input

2017 The Steering group drafted objectives and policies for 8 topics

2018 **March** The Steering group produced a draft plan and presented a summary to the Annual Town Meeting

2018 **October** An exhibition and consultation on the draft plan was held and comments invited. These were reviewed by the group, resulting in the inclusion of Affordable Housing and Custom and Self-build Housing policies.

2019 **March** Public consultation to confirm the draft policies.

Community Action Plan

This plan deals with land use policies. We have incorporated community aspirations that cannot be included in a land use policy in our Community Action Plan, see Appendix 3, page 64

Mid Devon Area profile

Employment
1.3% primary sector, e.g. agriculture
23.9% secondary sector, e.g. industrial/manufacture
74.8% tertiary sector, e.g. distribution, retail, services

Car ownership
1+ car/van 86%

Population increase 1991-2010
16%

Forecast population changes to 2033
65+ population, 54.3% increase
65+ living alone, 64.7% increase
75+ population, 81.8% increase

Home ownership

Privately owned 70.9%
Private rented 15.6%
Social rented 14..5%

The rise in the elderly population over the plan period is likely to impact on housing, social and health services. There is a consequent risk of the needs of young people and families having a lower priority and a smaller share of the budget. Local organisations have a key role in identifying community needs. While these are not planning issues, the planning system can help to deliver facilities that meet the needs of all sectors of the community.

The high level of car ownership means that achieving sustainable transport is a significant challenge.

3 Vision, aim and objectives

Vision

We are a creative and sociable community that is committed to developing, over the plan period, a sustainable town alongside our valued heritage and environment.

'Let's make it work better!' (Crediton Neighbourhood Plan inaugural meeting)

Aim

We aim to fulfil our community's aspirations to make Crediton an even better place to live, work and play, while retaining our distinctive assets of arts-based social projects and events, our St Boniface heritage, sustainable transport connectivity and our rural valley setting.

To achieve our aim and reach our vision we have key objectives to be achieved by eight policy topics

Our Objectives

to facilitate housing, businesses and infrastructure that fulfil our economic, social and environmental ambitions for the town - **Policy 1 – Development- Page 14**

to encourage our strong community spirit by fostering an active community life with town events for all – **Policy 2 - Community and Facilities- Page 20**

to create a vibrant town where people enjoy living, working and spending their leisure time - **Policy 3 - 3 Town centre – Page 22**

to improve the quality and quantity of sustainable transport options, especially for walking and cycling – **Policy 4 – Transport – Page 29**

to move towards becoming a more low carbon economy and more resilient in the face of climate change – **Policy 5 – Sustainability – Page 33**

to promote a wide range of business opportunities, and facilities for home-working – **Policy 6 – Employment – Page 35**

to maintain our heritage of historic buildings and enhance their use with well-designed additions and refurbishments – **Policy 7 – Heritage – Page 40**

to maintain the town's setting between the rivers Yeo and Creedy, and all its green infrastructure with enhanced biodiversity – **Policy 8 – Environment – Page 43**

2 Draft Policies Section

Section 1 Development

Key objective: to facilitate housing, businesses and infrastructure that fulfil our economic, social and environmental ambitions for the town.

Context

Mid Devon District Council's Forward Planning Team began identifying sites for development across the district more than ten years ago and produced early proposals in 2006. Since then the Mid Devon Local Plan has been developed with a series of consultations across the district and subsequent alterations. The Local Plan Review has now been completed and will set the framework for growth for Crediton until 2033. Crediton's housing allocation is 10% of the district's total requirement. The Local Plan explains that this amount is 'lower than might be expected for a town of this size, but environmental constraints limit Crediton's expansion…'. This gives us the opportunity to maintain the small market town character of Crediton, which is so highly valued. At the same time, it gives us challenges in terms of job opportunities within the town as employment land is also limited by the town's geography. Furthermore, road access to the town for HGVs by the A377 and A3072 is not as good as other locations elsewhere in the district.

1.1 Development principles

The issues

Housing sites seem to be more easily deliverable in Crediton than are industrial sites. However, an imbalance reduces the opportunity to start or develop a business locally. The Household Survey, 2015, showed that jobs and businesses was the highest expectation of sustainable development among the under 40s. The survey also showed that many people appreciate being able to work in the town where they live. Limited local employment space is an issue for us. We run the risk of being a convenient dormitory town with many residents commuting out of the area. As it is, of the current working age population, just over half work outside of the town. Of those, approximately two thirds commute to Exeter, generally by car. With higher productivity jobs increasing in the Exeter area, this travel to work could increase, with implications for sustainable principles.

Our Household Survey, 2015 and consultation event in October 2018 show support for new housing and local jobs. However, development in Crediton is often seen in a negative light. Developments of more than 10 houses, even on allocated sites, are usually opposed by nearby residents when they come forward. Large developments are usually opposed by entire neighbourhoods. The prospect of dense and badly designed buildings on green field sites, compromising the town's landscape and setting, and generating traffic around the town raises concerns. Many of these can be addressed if development is designed on sustainable principles, fits within the existing landscape, respects any existing green infrastructure or enhances it, and includes infrastructure of benefit to the whole community, for example, including pleasant and practical walking/cycling routes and amenity land. To resolve these issues, and to ensure our plan meets the town's needs for sustainable development, we have the following objective

Objective 1.1 to support a balance of mixed-use development of high-quality design in keeping with the town character (see Design Statement), that achieves a high level of sustainability (see *Section 5 Sustainability* and Sustainability Statement) and is well-integrated into the town in social, design and connectivity terms

This objective accords with the Local Plan 2013-33, S1 b) h) and the National Planning Policy Framework (NPPF) Ch 2.7, 2.8.

Objective 1.1 is to be achieved through policy D1.

Policy D1 Development principles

Achieving sustainable development is at the heart of the Crediton Neighbourhood Plan. New development in Crediton will be supported, subject to other policies in the development plan*, where it can be demonstrated that the following sustainable development principles have been addressed:

- the development is appropriately located for its purpose and is well-connected to the town centre by sustainable transport means.
- the development contributes to protecting and enhancing our natural, built and historic environment.

- the development makes effective use of land, delivers biodiversity net gain and wherever possible, includes proposals that contribute to the Devon Biodiversity Action Plan.
- the development takes into account the effects of climate change and the plans show what has been included that will help to mitigate and adapt to these changes.

Housing development will be supported where it provides the appropriate type and variety of housing to meet local housing needs and the social objectives of the NPPF and is able to demonstrate how it will help to achieve them.

** 'development plan' refers to all the planning documents applying to Crediton, including the National Policy, the Local Plan, any Supplementary Planning Documents and the Neighbourhood Plan*

1.2 Allocated sites

The issues

Large sites have a significant impact on the townscape and how the surrounding area, especially access and transport, will function once the development is completed. In order to make them function well, and to increase all aspects of sustainability of the site, an overall plan that clearly addresses these issues is needed. If the development is well managed it is more likely to be positively received by the community.

Town Plan consultations 2009, 2012 and Household Consultation 2015 show how much we appreciate the town's rural areas.

Losing open green fields and hedgerows to buildings, roads, and hard landscaping has a significant impact on our community and development can be seen as a negative. Natural features are appreciated by us all. The more these are retained where possible or introduced into the development, the more it blends into the landscape and its visual impact is softened. The existing community is keen to walk and cycle more and these are the sustainable options for the incoming community and businesses, as well as contributing positively to health and well-being, so we know these are crucial facilities to achieve.

To resolve these issues, we have this objective:

Objective 1.2

to create new developments that incorporate provision for wildlife habitat and biodiversity and, where possible, improve wildlife corridors and green infrastructure, and that are well-connected to the town centre for pedestrians and cyclists, improving and extending existing pedestrian and cycling routes wherever possible.

These sustainable principles are in accord with Local Plan 2013-33 S1 e), i); NPPF Ch 8, 91 a), b), c)

Objective 1.2 is to be achieved through policy D2.

Policy D2 Sites allocated in the Mid Devon Local Plan as shown on the Adopted Policies Map for Crediton

Full planning applications and reserved matters applications for allocated residential sites and mixed use sites should be supported by detailed plans and proposals which include:

- the type and location of open space and other green infrastructure, landscaping design and features, especially the greening of building frontages/private green spaces, gardens, fences, hedges, walls, retaining walls, paving, street trees, public open space trees and other features in the Crediton Design Guide
- how veteran trees, existing hedges, Devon banks and other landscape features will be incorporated and protected, replaced or enhanced by the development
- accessibility for pedestrians, cyclists and vehicles to, into, through and out of the site
- how drainage will be dealt with on site including, where appropriate, suitable SuD schemes on site in order to contain surface water run-off
- community and other infrastructure needs

Planning applications for commercial sites, including industrial and business developments, should follow policy D2, excluding the requirement for private gardens and community infrastructure.

1.3 Affordable housing

The issues

The Household survey 2015, and consultation in October 2018 show a desire to see affordable housing being built, even by those already housed, suggesting that residents support a range of households, ages and incomes being accommodated in new developments of different kinds.

At the present time, there are 66 households in Crediton in Bands B and C (High and Medium Housing Need) who are unable to find affordable accommodation in the current housing market.

The Strategic Housing Market Assessment (SHMA) 2014 for the Exeter Housing Market Area (HMA) calculates that in Mid Devon, as in other authorities, there are likely to be fewer affordable homes delivered through market led development than are needed.

The report mentions other methods of delivering affordable housing such as making better use of housing stock, empty or sub-standard buildings, and conversion.

It nevertheless concludes that there is evidence that the 30% average policy target across the HMA is justifiable, subject to viability. Mid Devon's Viability Assessment recommends 25% and the Local Plan Review policy is 28%.

Given that the SHMA's conclusion is that more than one method will be required in order to meet affordable housing need, we feel strongly that market led development must play its part along with the rest. We therefore support the Local Plan Review in its 28% target.

We also note that a higher percentage of affordable homes can be achieved through Housing Association and community land trust developments, which could be appropriate for Crediton and could be identified as part of a Housing Needs Assessment specific to Crediton. See Community Action Plan, Appendix 3, p64
To address this issue we have this objective

Objective 1.3 to support all means of achieving a sufficient supply of affordable housing, including in new developments. This objective accords with LPR S3 b) NPPF paragraph 5.62. Objective 1.3 will be delivered through policy D3.

Policy D3 Affordable Housing
Developments that meet the Local Plan Review policy target of 28% affordable housing will be supported, subject to other applicable policies in the development plan.

1.4 Custom and Self Build Housing

The issues
Housing developments from small to large scale are often delivered by a single developer. This can mean that large developments are comprised of a limited number of different designs, of differing sizes, arranged around the site. There is a price range but even the lowest price can be beyond local people. As well as being unaffordable to many, the completed estate has a homogenous appearance. What variety of design there is, is often subsumed in the limited palette of colours and materials.
The average price of a 2-bedroom starter home in Crediton is £190,000-£200,000 which requires a deposit of 10% or 5% through the help to buy scheme. The buyer would need an income of £35,000-£40,000. The average wage in mid Devon is £24,031.This puts house purchase out of the reach of many local people, especially where there is only one income. Custom and self-build housing can offer an affordable route to achieving a home as well as offering opportunities for innovative and energy efficient design and could be a feasible solution for some residents.
The district council has a list of interested applicants for custom and self-build housing sites in Crediton so there is evidence of demand. Supporting evidence is also set out in the Local Plan Review evidence base, such as the Custom and Self Build Demand Assessment Framework (Three Dragons, July 2018). Other useful sources of supporting evidence could include local housing needs surveys or secondary data from external sources such as Buildstore (www.buildstore.co.uk)
To resolve these issues, we have this objective:

Objective 1.4 to support and encourage custom and self-build developments to increase the variety of housing available. This approach to achieving social integration and design variety accords with Local Plan 2013-2033 S1 g). Objective 1.4 is to be achieved through policy D4.

Policy D4 Custom and Self-Build Housing

Custom and self-build housing, especially where supported by locally specific evidence, can provide a more affordable housing solution and will be supported subject to other policies in the development plan.

1.5 Design

The issues

Over recent years, residential developments that have not, in the public view, achieved compatible design have remained unpopular. Those that paid attention to setting, detail and compatibility have been commended for the sense of place that has been achieved or, for smaller developments, their contribution to the integrity of the townscape.

We aspire to a housing stock of good quality to achieve sustainability. We support innovative design, especially any which aims for resilience to climate change. As a community we are critical of bland developments of a minimum standard. Growth will always be more acceptable where developers work with communities to achieve the best possible result in design, standard of accommodation and facilities for the residents. We welcome consultations with developers and actively encourage approaches.

Gateway sites are an emerging issue. Two of them are located next to river valley floodplains. Development is restricted to non-residential uses, and where these are industrial, they can have a particularly strong impact on the valley setting. We aim for these town edge sites to act, as far as possible as a transition between urban and rural so that the flood plains and the rivers themselves are protected from degradation.
To resolve these issues, we have this objective:

Objective 1.5 to achieve development of high quality, with aspirational green infrastructure and landscaping, and gateway sites that are designed with an impact and density that forms a transition between the townscape and the open countryside This accords with Local Plan Review 2013-33 DM1; NPPF Ch 12, pp38-39 Objective 1.5 is to be achieved by policy D5.

Policy D5 Design

Proposals for new development should have regard to the Crediton Design Guide and, subject to the scale and size of the proposal:

- be locally distinctive, reflecting and complementing the local traditional housing design. Contemporary housing designs, including small or individual developments, should demonstrate how they relate to the existing built environment and make a positive contribution to the townscape especially within the conservation area and/or impacting on heritage assets.
- use materials which reflect and complement existing development
- include safe, practical and well-designed walking and cycling access to public transport points, where achievable.
- include adequate storage for recycling bins for each property that does not impact negatively on the street scene.
- be supported by a landscaping scheme that is sustainable, that includes native species in keeping with the character of the area, that contributes to the biodiversity of the area, supports green corridors wherever possible and contributes positively to green infrastructure of Crediton as promoted in policy EN4.
- use a porous surface capable of absorbing heavy rain where garden/open space is proposed for car parking, and a design that is compatible with the existing street scene. The design of any Sustainable Urban Drainage System (SUDS) should comply with the relevant Devon County Council guidance.

2 Community and facilities

Key objective : to encourage our strong community spirit by enabling an active community life with town events for all

Context

Crediton has a huge number of community groups covering all aspects of social life. Many of these groups regularly work together to produce town-wide events which are appreciated by residents and are core to town life. Current performance and presentation spaces in the town are inadequate for the aspirations of these groups. In order to develop facilities for the coming decades, the Town Team has identified the need for a multi-use space.

2.1 Community Hub (Heart Project)

The issues

The Town Team's Hub Study was the result of a long period of research and consultation with all the producing arts groups and other organisations on their requirements. The study identified the hub as a long-term project requiring substantial funding. A large number of groups are in support of pursuing this.

The Town Team has now set up 'The Heart Project' and recruited Trustees with a variety of skills to help progress it. The 2019 Feasibility Study and Business Plan considers options on new build, re-use of existing buildings and potential sites. It looks at possible facilities and potential users, based on surveys and consultations with stakeholders.

The Town Council is strongly in support of the project. However, no site or building has yet been firmly identified. This plan therefore supports in principle the use of a suitable site or building within the Neighbourhood Plan area for The Heart Project. To progress this issue, we have the following objective:

Objective 2.1 to support the Community Hub project in order to maintain and improve the range of social, community and leisure facilities for all ages and to support proposals that enable and develop the town's strong community spirit. This accords with NPPF Ch 8, para 91, para 92 a), b) Objective 2.1 will be achieved through policy CF1.

Policy CF1 Community Hub

Development of a Community Hub facility will be supported either where it involves the re-use of an existing suitable building or the development of a new building, or both, subject to:

- protecting the residential amenity of adjoining occupiers
- the provision of adequate car parking
- the design of any new building and landscaping being in conformity with policy D5 of this plan.

2.2 Young people's facilities

The issues

Since the termination of Youth Services in 2014 and the handing back of the Haywards Youth Centre to the County Council, young people in the town have had no dedicated youth activity space in the town centre. For the last few years, the Congregational and Methodist churches have been making space available for youth activities during the week. However, these do not replicate the independent youth provision that previously existed. When work on this Neighbourhood Plan started, a representative group of young people from the closing youth centre made a plea to the Steering Group to consider the needs of their age group, feeling that resources were being removed from them and not replaced, and that there was no location for youth in the High Street. These needs were confirmed by the Household and Schools surveys, and youth worker's reports. The town council has now appointed a full-time youth worker who has confirmed the same needs and issues. The Neighbourhood Plan therefore needs to address the lack of facilities for young people, both indoor and outdoor, that have been identified.

To progress the issue, we have the following objective:

Objective 2.2 to support the provision of a suitable meeting space for young people in the town centre, and proposals that will increase and/or improve open space facilities for teenagers. This objective is in accordance with Local Plan 2013-2033 Policy DM23; MDDC Open Space report identifies lack of outdoor amenities for youth; NPPF Ch 8 para 91 a) 92 a) b) Objective 2.2 will be achieved through policy CF2:

Policy CF2 Young people's facilities

The provision of young people's amenity space and the development of a young people's activity space, whether it re-uses an existing building, or re-develops a site with a new building, will be supported subject to protecting the residential amenity of adjoining occupiers.

2.3 Queen Elizabeth Academy School

The issues

For decades, Queen Elizabeth's and the education authorities have discussed the difficulties presented by the split site with years 7-8 at the Barnfield campus and years 9-13 at Western Road. Up to now it has not been possible to develop a single site for the school. However, circumstances could change to make that achievable. Alternatively, the two sites might continue to operate as they do presently but with further development to accommodate changing needs.

Should further development happen on either site, meaning a sharing of facilities between them, and increased travel between them, for air quality improvements we aim to ensure that the two sites are adequately linked to reduce coach trips through the town centre and to increase safe pedestrian/cycle connectivity between Barnfield and Western Road for all users of the school facilities and for other users of the footpath itself. Should a single site school become achievable, we would again aim to improve access for cyclists and pedestrians along Tin Pot Lane and other footpaths leading to the site.

To help address this issue we have the following objective:

Objective 2.3 to support redevelopment of Queen Elizabeth Academy School at Barnfield/Western Road split sites or one of those sites, provided that Tin Pot Lane is upgraded and cycle routes are considered. This objective conforms with NPPF 102 c) LP S1 e) Objective 2.3 will be achieved by policy CF3

Policy CF3 Queen Elizabeth Academy School

Subject to other policies in the development plan, the neighbourhood plan supports the development of a new single site for, and/or supports the redevelopment of, the Queen Elizabeth Academy School on its current sites with enhanced sports facilities at Barnfield provided that:

- the proposals include investment in the redevelopment of Tin Pot Lane to make it a safe, practical and attractive walking route linking the two sites or providing single site access
- the proposals maintain or improve cycle access.

3 The Town Centre

Key objective: to create a vibrant town where people enjoy living, working and spending their leisure time

Context The independent shops in Crediton town centre are greatly appreciated by residents of the town, the local area and visitors from further afield. They provide a neighbourhood service for people living in and around the High Street. At the same time, the town centre offers those from other parts of

the town the opportunity to choose locally sourced and locally made fresh produce. It offers varied goods and services from independent retailers able to offer a personal service. There is a well-supported cafe culture and a variety of restaurants and take-aways which bring people into the town centre. The small size of most of the retail premises makes new business start-ups more viable and the town has a lower rate of empty shops than elsewhere in the district. It would be unwise to take the town centre for granted or to be complacent about its future. The role of market towns and their High Streets has changed over the last 30 years and shoppers have a wide choice for making purchases, using other towns and other methods. Support for our town centre is widely held. This plan aims to support what we already have and to propose policies to help make it a destination of choice. Factors that contribute to managing and improving the town centre or which need to be considered are included in the High Street Vision statement.

3.1 Town Centre development

The issues

The town centre is strongly supported, as the Household Survey shows, but the level of traffic, noise and pollution is a constant complaint in the same survey and has been for decades. Crediton is more or less a one-street town, therefore the conditions on that street are very significant to businesses located there and their users. Any condition that discourages footfall is a threat to the viability of retail in particular. Therefore, every condition that affects this needs to be carefully considered.

Issues raised by residents include the loss of ground floor retail the primary shopping area to office space and charity shops. These developments are perceived as being a discouragement to shoppers as the retail offer is reduced. Shops being left empty for long periods; the impact of edge of town superstores on the High Street are also issues that are seen as a discouragement of town centre use.

Current planning policy allows for certain permitted developments within town centres, therefore there is a limit to how far this plan can address some of the issues than concern residents. In any case, a mix of uses is essential as not every visitor or local resident is looking for the same service or goods. What this plan can aim to do is to use the planning system to make the High Street a destination of choice for a wide variety of people by affecting what we can, principally, what the High Street looks like and how it works for all its users.

To resolve these issues, we have the following objective:

Objective 3.1 to promote Crediton as a centre for business and retail by improving the functionality, physical environment and appearance of the town centre to improve the shopping and leisure experience for pedestrian users .This objective is in accordance with Local Plan 2013-2033 S7 b) NPPF 85 b)

Objective 3.1 will be achieved by policy TC1

Policy TC1 Town centre development

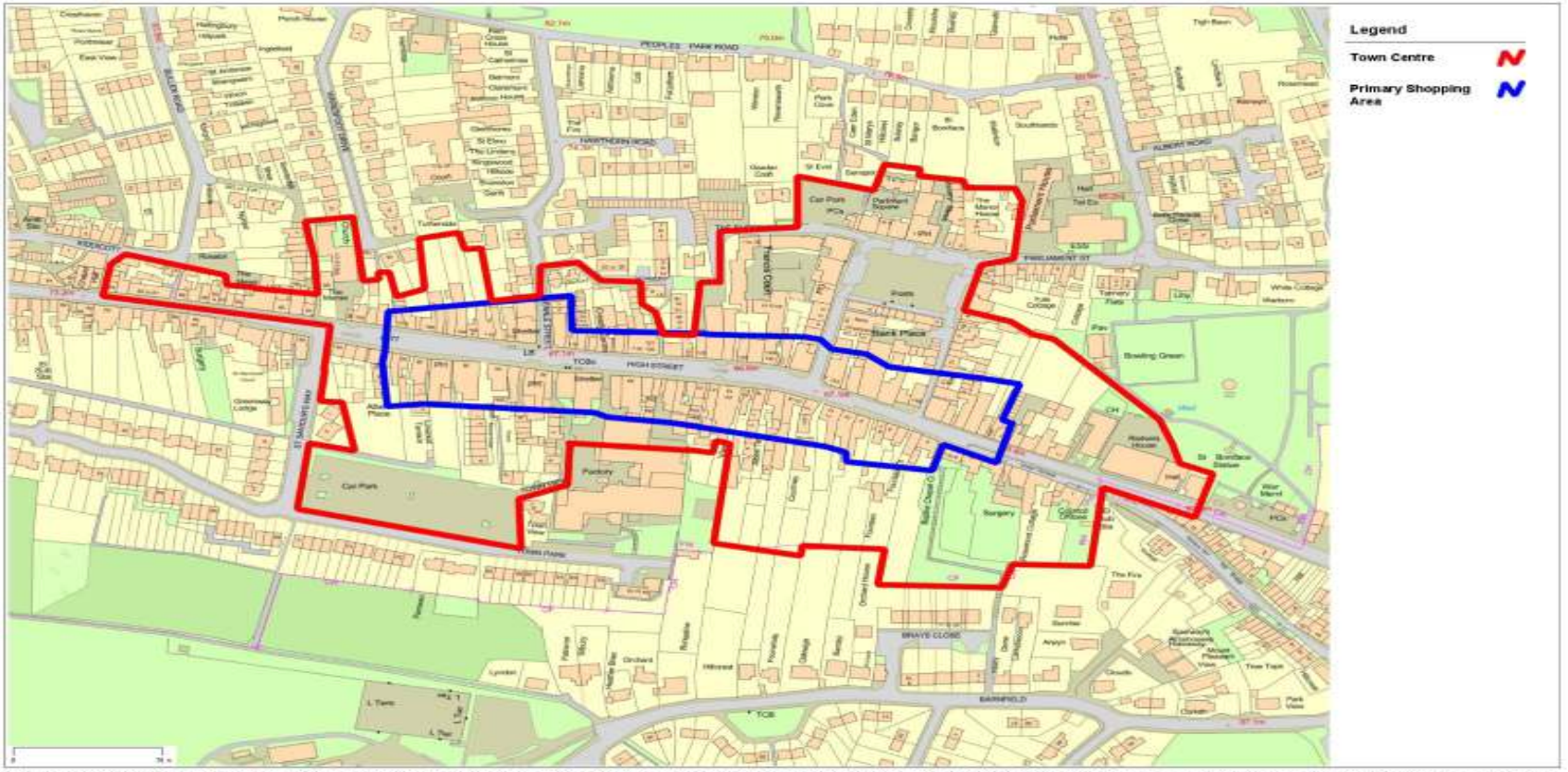
Development proposals within the town centre boundary as defined in Figure 2 will be supported where they provide:

- a well-balanced mix of uses
- high quality design and construction which integrates well with Crediton's distinctive and historic character including existing buildings
- improvements to the functionality of the town centre that will benefit pedestrians, shoppers, cyclists and residents of the town centre.
- improvements to biodiversity and green infrastructure and the quality of the public realm where appropriate.

Parish Online

Fig. 2
Town Centre

Crediton CP



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3.2 Town centre living

The issues

Crediton town centre developed as a wide main street, capable of accommodating a livestock market along its length until the mid 19th century. Behind the main street frontages, Medieval burgage plots, accessed by alleyways, contained small cottages and workshops. Many of these burgage plots remain, along with modernised living accommodation so there is already a large residential community just off the High Street as well as on it.

This community adds to the viability and vitality of Crediton town centre as well as the sustainability of the town as a whole. The larger it is the more it contributes. Empty premises of any type are detrimental to the economy of the town. They can be a discouraging eyesore as well as a waste of space and resources that could be brought into a more suitable use. While we don't want to lose shop premises in our primary retail area, we are keen to support living accommodation in the town centre.

To address this issue, we have this objective:

Objective 3.2 To encourage residential use in the town centre above ground floor level in the primary shopping area. This objective is in accordance with NPPF 85 f) Local Plan 2013-2033 DM14 b) Objective 3.2 will be achieved by policy TC2

PolicyTC2 Town Centre Living

Within the town centre boundary, development will be supported that re-uses buildings for residential use above ground floor level, including live/work accommodation and "living over the shop".

3.3 Public realm

The issues

In spite of its width, there is not a single tree at present along the length of the High Street. Over the last few decades, the town council has received approaches by different community groups and individuals asking for trees to be planted. It has so far not been possible to achieve this. Up to the present, the town council and the Chamber of Commerce have focused on summer floral decorations mainly in tubs and planters where there is space, and in hanging baskets on the frontage of buildings. These are keenly supported by the community but there is a strong desire to see some permanent planting to complement the built environment.

The roads and many pavements were constructed at a time when there was little or no consideration of equal access. Some locations where people need

to cross are not readily useable except by the young, fit and able. The less able frequently make the case that the town centre can be hazardous for them. When developments take place that affect pedestrian amenities, we are keen to see them improved as much as possible so that the town centre becomes an easy place for everyone to get around.
To help resolve this issue we have this objective:

Objective 3.3 to encourage tree planting, other permanent planting schemes and improvements to pedestrian amenities wherever development allows, to improve the accessibility and appearance of the public realm. This objective conforms with NPPF 2.8.b) Objective 3.3 will be achieved by policy TC3.

Policy TC3 Public realm
Developments affecting the public realm will be supported where they include proposals for increasing and/or improving pedestrian amenities and for making the town centre more attractive and pleasant to be in and walk around, including opportunities for planting and increasing biodiversity, where possible.

3.4 High Street to St Saviour's Way car park access route

The issues
Parking is a major irritant to Crediton residents. The household survey showed that 81% agreed that there is a car parking problem. Of these, more than half cited the High Street, our car parks and town centre parking locations as being the problem areas. This suggests that town residents perceive that the parking facilities are inadequate rather than that parking is illegally done or poorly managed throughout the town.
St Saviour's Way car park is 150 yards from the High Street and on a normal day, there are available spaces. However, it is not visible from the High Street and pedestrian access to it is via a low, dark, unattractive archway between food outlets that leads to a poorly surfaced, sloping, winding lane with a variety of cottages and on one side and residents' cars, various walls and a galvanised metal fence on the other. Vehicle access is at the other end, at the start of the main High Street retail area.
The perception of the access route is that it is steep and hard to walk up. The perception of the car park is that it is distant from the shops – 'a town edge location'. It is true that the access is not level and could be a challenge for elderly persons or anyone with mobility difficulties. However, for others, were the route more attractive, it might seem less out of the way, and the desirability of using the car park might well increase.
To resolve these issues, we have this objective:

Objective 3.4 to improve the connectivity of the High Street and St Saviour's Way car park. This objective accords with National Policy promoting town centre viability Ch 7 and Local Plan policy S1 c) Objective 3.4 will be achieved by policy TC4.

Policy TC4 High Street to St Saviour's Way car park access route

Improvements to the functionality and attractiveness of the existing access route from the High Street to St Saviour's Way car park will be supported. Redevelopment of the factory site adjacent to the route will be supported (bearing in mind the need to retain employment land Mid Devon District Plan Review Policy DM19) subject to improvements to the boundary fence to achieve biodiversity net gain, visual attractiveness of the route and enhancement of the public area.

3.5 Shop fronts

The issues

The historic buildings along the High Street are a valued part of Crediton's heritage. Much of the pre-Georgian architecture has been destroyed by various fires. Most of what we have is 18th and 19th century, with 20th century additions. The High Street falls within the conservations area and some buildings are listed. There is a strong interest in preserving the integrity of the current High Street as much as possible. Inappropriate alterations can have an adverse effect, not just on the building itself but also its surroundings. Shop fronts run more or less uninterrupted along the length of both sides of the High Street. The appearance of the shops, and how far each one is compatible with the building that it fronts, its neighbouring buildings and shops, affects the quality of the built environment. Whilst we do not want to preserve the High Street in aspic, at the same time, we want to maintain and encourage shop fronts that are sympathetic to the town's architecture.

To address this issue, we have this objective:

Objective 3.5 in order to ensure that the design of new business and retail shop fronts, or any alterations, are compatible with the built heritage of the town centre, developers will be referred to the design statement and the shop fronts leaflet. This objective adds local detail to NPPF 185; LPR DM16. Objective 3.5 will be achieved by policy TC5.

Policy TC5 Shop fronts

Proposals for the development of new shop frontages or the refurbishment of existing shop frontages and other commercial premises in the primary shopping area will be supported where the proposed alteration or replacement is sympathetic to and respects the architectural integrity of the building and the character of the area with special regard to such matters as scale, pattern of frontages, vertical or horizontal emphasis, materials colour and detailed design. (See Appendices, Shop Fronts leaflet; Design Guide)

4 Transport

Key objective: to improve the quality and quantity of sustainable transport options, especially for walking and cycling.

Context

Crediton High Street has a history of poor air quality. It carries HGV through traffic, local commercial vehicles and school buses. It also carries significant levels of private local traffic. When the transport studies for the link road were done, number plate recognition surveys showed that a high number of vehicles passing up and down the High Street belonged to town residents doing short journeys.

Cars are convenient and it can be difficult for us to persuade ourselves out of the habit of using them, even when there are more sustainable alternatives available at less expense. However, increasing sustainable transport usage will also improve the parking situation in the town, which was a specific aspiration of respondents to the household survey. This aspiration is equally a challenge.

Advice to walk more and do more exercise like cycling is given for people of all ages. If the advice is followed, it's a win/win for fitness and reducing vehicle journeys. However, people choose not to walk or cycle through areas they feel are unpleasant or unsafe. The more vehicles that are on the roads, the more pedestrians and cyclists are discouraged. Changing the physical environment and planning policies that have for decades put vehicles ahead of pedestrians and cyclists is a further challenge.

4.1 Footpaths and cycle routes

The issues

There is very strong support for walking and cycling in Crediton. The Household Survey shows 99% in favour of better footpaths and 89% in favour of better cycle routes. As a community, we are aspirational for achieving a healthier lifestyle and getting about in a more sustainable manner. Poor connections to the bus routes and station were cited as being reasons for not using public transport more.

Although it is clear from the Household Survey that commuters do not regularly use the bus or train, it is also clear that those who are not commuting but simply moving around the town are keen to see good walking and cycling routes in all parts of the town. In the past, these routes have not been the focus of planning policy and/or the needs in some areas have changed with the result that some walking routes are disconnected, difficult or dangerous because of the way development has happened in the past. We feel that some of these needs can be addressed through new or re-developments.

To resolve this issue we have this objective:

Objective 4.1 to improve walking/cycling routes throughout the town and improve their connectivity to different forms of public transport, including from new developments. This objective is in accordance with LP S1 e) and NPPF 102 c) 104 d). MDDC Air Quality Annual Status Report for 2017 says: walking,

cycling, using public transport and buying local food reduce emissions as well as having health benefits. Objective 4.1 will be achieved by policy T1.

Policy T1 Footpaths and cycle routes

Development proposals which include improvements and extensions to existing town footpaths and the footpath/cycle path network, including crossing points, allowing greater access and connectivity between the town centre, new housing, green spaces, workplaces and open countryside will be supported subject to other policies in the development plan.
The loss of existing footpaths and walking routes will be resisted.
See Map 1 (Appendix 1, p51) for existing footpaths requiring improvement to encourage walking.
See Map 2 (p52) for missing footpaths that interrupt connecting routes or encourage pedestrians to walk in the road.
See Map 3 (p53) for points where pedestrian facilities for safely crossing the road need to be provided to maintain the integrity of the footpath network.

4.2 Crediton to Exeter cycle route

The issues
Commuting to Exeter by bicycle is feasible in terms of distance but risky in terms of safety and unpleasant at the least because of the nature of the route and the size of other vehicles using it. The narrowness of the road for almost the whole distance does not allow for a dedicated cycle lane and in many parts does not allow for safe overtaking of a cyclist.
Local cyclists, largely through the Boniface Trail cycle route group, are endeavouring to develop a route avoiding the most hazardous parts of the A377, which would be a shared use trail. Even though achieving this might take some time, we feel it is important to think ahead and consider how such a route would connect to the town.
To address this issue we have the following objective:

Objective 4.2 to improve connections to the wider cycle network, in particular to the Crediton to Exeter cycle route
This objective accords with the same sustainable transport policies as Objective 4.1; also with LP DM22, Tourism and leisure development, because the Boniface Trail will connect to the Exeter cycle network. Objective 4.2 will be achieved by policy T2.

Policy T2 Crediton to Exeter Cycle path

Where possible, all new developments at the east end of the town should have a safe and practical connection to the proposed Crediton to Exeter cycle path.

4.3 Development along principal routes

The issues

As the town has expanded, sections of principal route that used to be outside the settlement are now inside it. Retail and services have been located along routes which do not always have pedestrian connectivity, requiring pedestrians to cross and recross the road (usually where there is no crossing point) or to walk in the roadway. This is clearly inconvenient and potentially unsafe. Poor design of some developments in the past have led to this situation.
Because there is strong support for good walking routes, and we will need good connectivity as the town expands further, it is necessary to ensure that new developments contribute to making the network better, not more limited or constrained.
To address this issue, we have this objective:

Objective 4.3 to ensure that new developments along principal routes maintain existing pedestrian facilities or include proposals for creating additional pedestrian facilities on those routes. This objective is in accordance with NPPF 9.102 c) LP S1 e) Objective 4.3 will be achieved by policy T3.

Policy T3 Development on principal routes

Development of sites adjacent to the principal routes A377, A3072, Higher Road (see Fig 3, page 32) where there is no existing pavement will not be supported unless the development includes the provision of a pavement or footway, dual use where possible, along the principal route in addition to any pedestrian provision within the development site itself, and which connects the development directly into the existing footpath network.

Parish Online

Fig. 3
Missing Footway Ahead Of Development

Crediton CP

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4.4 Off street parking

The issues

81% of respondents to the Household Survey believed that there is a parking problem in Crediton. Most cited the town centre streets and car parks as being the problem areas for parking, but some residential streets were also mentioned. It is evident that the existing car parks are needed.

In addition, the proliferation of roadside parking by residents increases the pressure on finding a car parking space for visitors and service vehicles. We are therefore in support of the district's minimum standard for large developments of 1.7 spaces, rounded up to 2 spaces per dwelling for 1-2 houses.

In order to address this issue, we have this objective:

Objective 4.4 to ensure that there is adequate parking available in the town for visitors, service vehicles and workers by maintaining off street parking**.** This objective is in accordance with LP DM5 4.19a Objective 4.4. will be achieved by policy T4.

Policy T4 Off street parking

Development proposals that would result in the loss of off- street parking will not be supported unless it can be shown that there is no need for the car park or that equivalent space is being provided elsewhere.

5 Sustainability

Key objective: to rely on our own resources, reduce environmental degradation, mitigate and adapt to the effects of climate change

Context

Sustainable principles work towards reducing to a minimum the resources we use for all aspect of living: halting the consumption of finite resources and using technology to reduce our impact on the planet. In respect of climate change, this means radically reducing greenhouse gas emissions within the next 30 years, and eventually stopping emitting green-house gases altogether. We know we must achieve cleaner energy and, especially, renewable energy.

We have a strong Sustainable Crediton group. Over 500 local people and groups receive monthly updates from the SC groups working on Waste/Recycling, Housing, Transport and Food. 'Give &Take' re-use events have resulted in tons of unwanted items avoiding landfill and being reused.

In 2012, over 80 individuals and organisations met to explore moving towards a low carbon community. Many of the ideas put forward have informed this plan and the Sustainability Statement (see appendix 2, pg 60).

5.1 Renewable energy

The issues

In terms of renewable energy, the Household Survey showed support for solar energy as the preferred renewable and the DARE Renewable Energy Feasibility Study found similar support through public consultation. Unfortunately, in spite of the NPPF's environmental objective for achieving sustainable development, there are no requirements on developers to build renewable energy sources into their designs nor to consider the energy needs of their housing developments over the next 30 years or where this will come from. The low carbon functionality of the development in terms of energy use is not considered and it is left to individuals to provide renewable sources for themselves. All this plan can do is try to encourage developers to think sustainably. To address the issue, we have the following objective:

Objective 5.1 to encourage new development to provide a proportion of its energy needs from on-site renewable energy (especially the incorporation of solar panels in new house building). This objective is in accordance with NPPF 127 a) which requires that a new development should function well and add to the overall quality of the area not just for the short term but for the lifetime of the development. Objective 5.1 will be achieved by policy S1.

Policy S1 Renewable energy excluding wind turbines

Proposals for energy generating infrastructure using renewable or low carbon energy sources to serve individual properties or small groups of properties will be supported provided that:

- the energy generating infrastructure is located as close as practicable and is in proportion to the scale of the existing building the proposed development is intended to serve
- the siting, scale, design and impact on landscape, views and wildlife of the energy generating infrastructure is acceptable and does not compromise public safety and allows continued safe use of public rights of way
- adjoining uses are not adversely impacted in terms of noise, vibration or electromagnetic interference
- where appropriate, the energy generating infrastructure and its installation complies with the micro generation certification scheme or equivalent standard.

5.2 Energy diversification

The issues

Businesses and industrial buildings that have large roof areas are well-placed to consider roof-mounted solar panels that would contribute to meeting their energy needs. As a community we want to support sustainability, therefore we will encourage all commercial developments to consider suitable renewable energy sources that will help to reduce energy use from finite resources.

To resolve this issue we have this objective

Objective 5.2 to encourage businesses, industrial units and new commercial development to consider diversifying their energy sources by installing or designing into construction renewable sources of energy. This objective in accordance with LP DM2. Objective 5.2 will be achieved by policy S2.

Policy S2 Energy diversification

Initiatives that would enable local businesses to develop renewable and low carbon energy will be supported where:

- the primary function is to support their operations
- they are subordinate to the primary business
- the siting, scale and impact of the proposed development is appropriate to its setting and position in the wider landscape.

5.3 Community scale renewable energy

The issues

The South-West is one of the best locations in the UK for solar energy. Where appropriate sites exist, communities can develop solar projects which help to reduce dependence on fossil fuels.

To progress this issue we have this objective:

Objective 5.3 to encourage the development of appropriate standalone renewable energy projects, both by the town council and others. This is in accordance with LP DM2. Objective 5.3 will be achieved by policy S3.

Policy S3 Community scale renewable energy

Proposals for community scale energy from renewable sources will be supported where

- the siting and scale of the proposed development is appropriate to its setting and position in the wider landscape;
- the proposed development does not create an unacceptable impact on the amenities of local residents;
- the proposed development does not have an unacceptable impact on a feature of natural or biodiversity importance.

6 Employment

Key objective: to promote a wide range of business opportunities and facilities for home-working

Context

Many people have responded in surveys that they appreciate being employed locally or having the opportunity to set up a business in dedicated premises close to where they live. Crediton has limited land available for employment use so that land which has been allocated as such through the Local Plan Allocations procedure needs to be retained in order for people's aspirations to be met.

A future for Crediton as principally a dormitory town for Exeter is not an aspiration that has been expressed in consultations: quite the contrary. Aside from the need for local jobs, investment tends to follow employment; market towns like Crediton will need to work hard for their share of development of the district and regional economy: other towns and cities are better connected to the road infrastructure are easier and more attractive locations for investment.

It is perhaps a question of scale: Crediton would be unsuitable for the extensive developments proposed at Junctions 27 and 28, but new and existing businesses are looking for start-up premises or opportunities to expand. This plan aims to recognise and enable those ambitions.

6.1 Mobile phone coverage

The issues

Parts of the town have a poor mobile phone signal which limits options for home working for those without a landline. As new working methods develop, more people are able to develop a business that relies on communication methods rather than travelling to a dedicated workplace. This is a more sustainable option that we are keen to facilitate.

To resolve this issue, we have this objective:

Objective 6.1 to support provision of good communication facilities, including mobile phone signals, to enable a variety of business opportunities in suitable locations, including working from home**.** This objective is in conformity with LP S1 f) Objective 6.1 will be achieved by policy E1.

Policy E1 Mobile phone coverage

Facilities for achieving a good mobile phone signal throughout all areas of the town will be supported provided the facilities are appropriately located.

6.2 Change of use of allocated employment land

The issues

Many respondents to the Household Survey gave the opportunity to work in town as a reason they liked living in Crediton. Local jobs and businesses came

top of the list of benefits that people under 40 saw as a benefit that development could bring. It was second for the over 40s. Many residents supported the Exeter Road Tesco development on the basis that it would enable the provision of small business accommodation and start-up premises which are needed if new or current residents are not to add to commuter traffic on the road network. The current industrial estates are full or almost full with little capability of expanding. The new housing developments already proposed or allocated in the local plan, could provide new local businesses with a local workforce. For this reason, the loss of any of the allocated employment sites (defined in Policy DM19 in the adopted Local Plan), through a change of use will be resisted.

To address this issue, we have the following policy:

Objective 6.2 ensure that allocated employment sites are retained. This objective conforms with LP DM19 4.58

Policy E2 Change of use of allocated employment land

The change of use of allocated employment sites will not be supported except in circumstances where it is demonstrated that there is a sufficient range of suitable and available employment sites in the local area and the site has been marketed at an appropriate price for a minimum of eighteen months.

6.3 Re-development and expansion of existing town centre employment sites

The issues

There is a small number of employment sites in the town centre which have some negative impact on other town centre uses. Given the sparsity of employment sites in the town, it is likely that these sites, which offer local jobs, will continue to be needed. We therefore support their current use as long as that is the case. Were they ever to be redeveloped, their negative impacts could be reduced through better design and environmental considerations. With attention to the potential for green infrastructure, their appearance could be significantly different so that local people might feel less concerned about employment sites close to residential areas.

To help resolve these issues, we have this objective:

Objective 6.3 to take the opportunity of re-development to integrate town centre employment sites better into their surroundings by ensuring appropriate use, good design, landscaping incorporating green infrastructure, native planting and wildlife habitats. This objective is compatible with LP DM1 Objective 6,3 will be achieved through policy E3

Policy E3 Re-development and expansion of existing town centre employment sites

The re-development of existing employment sites in the town centre will be supported provided that

- the scale and nature of the new proposals would not have significant harmful impact on the amenities of existing adjoining activities
- the scale and nature of the proposals would not have unacceptable conflicts with other existing land use activities
- the proposal would not have an unacceptable impact on the local road network
- the redevelopment would include proposals for improvement in connectivity and pedestrian access where required and possible
- the proposal conforms to policy D5 of this plan: in particular, the proposal uses appropriate materials, colours and includes green infrastructure, landscaping and native planting to contribute to biodiversity and wildlife habitats.

6.4 Re-development of the Mill Street industrial and commercial area

The issues

The Mill Street area (fig 5, p39) has a number of industrial, retail and commercial sites. Some of these have developed in a piecemeal fashion over many years. With new residential development planned at this end of town and with larger vehicles accessing the sites, the area now has a number of issues that could be resolved if the area was redeveloped as opportunities arise according to a forward plan. Issues include:

- the lack of a pavement on the west side of Mill Street from ATS to Morrisons entrance
- the poor crossing facilities for pedestrians at the north end of Mill Street at the junction with Blagdon
- the unsuitability of HGVs accessing Crediton Dairy via Church Lane
- the potential to improve pedestrian and cycle connectivity by creating a dual use route from Church Lane to Mill Street
- the disused industrial area at the entrance to the trading estate
- the poor quality of the street scene, including the entrance to Westward Business Centre on the east side and the frontages on the west side from Morrisons to the old Mole Avon site.

Fig 5 Mill Street industrial and commercial area

To address these issues, we have this objective:

Objective 6.4 to achieve improvement of the Mill Street industrial and commercial area by increasing connectivity, reducing HGV impact and enhancing the street scene. This objective is in accordance with LP S1 b) e) h) Objective 6.4 will be achieved through policy E4

Policy E4 Re-development of the Mill Street industrial and commercial area
Re-developments and expansions in the area shown in Fig 5, including mixed use purposes, will be supported subject to these criteria:
- the proposal improves connectivity where possible
- the proposal makes a positive contribution to the street scene
- the proposal includes landscaping and planting to improve the public realm and increase biodiversity.

7 Heritage

Key objective: to maintain our heritage of historic buildings and enhance their use with well-designed additions and refurbishments.

Context
Crediton has significant heritage assets, the parish church in particular – the only Grade 1 listed building in the town – and topping the list of most valued heritage assets in the Household Survey. The station also has a listed signal box, one of only three in the country, which is in daily operation. Other historic buildings may have a lesser classification or none but the town has its conservation area which aims to protect the integrity of the historic core. Buildings and open spaces adjacent to the conservation area are important in maintaining the townscape and the historic setting and changes to these fringe sites can impact on the heritage of the whole. Disastrous town fires across the centuries have left Crediton with fewer old, picturesque buildings than other market towns. It is therefore important for us to recognise what we have and to ensure that it is maintained and kept in use for the benefit of future generations. Once it's gone, it's gone and it's no good saying afterwards, 'We should have kept that'. Equally, we sometimes only get one chance in a generation or more to protect historic assets from incompatible adjacent development. Deterioration of the historic core can happen gradually over time without adequate measures to protect it, as has happened in the recent past.

7.1 Historic character

The issues

The historic character of Crediton is greatly appreciated by the vast majority of people in the town, particularly our most historic buildings and features. The household survey showed almost unanimous support for the parish church, closely followed by the war memorial. Other historic buildings and parks also received strong support. It is not always obvious what effect a development will have on a listed building or the setting of a historic asset and sometimes this is realised too late. This plan aims to include robust policies that will protect assets and aspires to investigate and document our historic heritage further so that what the community values is recognised and protected.

To address this issue we have the following objective:

Objective 7.1 to maintain the historic character of Crediton and the settings of our historic buildings, especially the parish church and the war memorial

This objective conforms with LP S1 m) NPPF 185. Objective 7.1 will be achieved through policy H1.

Policy H1 Historic character

In order to protect the historic character of Crediton, proposals affecting designated and non-designated heritage assets and their settings, including those with archaeological interest must comply fully with the requirements of National Planning Policy, the development plan and the guidance on design in the Crediton Design Guide

7.2 Historic landscape character

The issues

Crediton developed in the medieval period with burgage plots behind the High Street houses. The plots were surrounded by cob walls to the north and the south, some parts of which remain and are mentioned in the Devon Historic Market and Coastal towns survey. Retaining walls of local volcanic stone are a traditional feature of the town and some cobbled paths and cob walls are still intact. In some town edge roads and lanes, Devon banks have survived and we are keen to see these included in developments wherever possible.

To address this issue, we have this objective:

Objective 7.5 support proposals that enhance open spaces and preserve the public realm in the historic core including heritage assets such as cob walls, historic boundary walls, Devon banks and cobbled pathways. This objective accords with LP DM25 4.78, assets mentioned in the Devon County Historic Environment Record.

Policy H2 Historic landscape character

Developments that affect the significance of non-designated heritage assets, including landscape assets, as listed in the Heritage Action Plan, Asset Listing Proposals, should consider their significance to the town's built heritage and whether the public benefits of the development outweigh the loss of the significance of the asset.

7.3 Development within the Crediton Conservation area

The issues

The designation of the conservation area has helped to preserve many of the designated and non-designated buildings in the historic core. The High Street buildings are appreciated by the local community as the Household Survey shows. However, even 15 years ago, the Crediton Conservation area appraisal (2003) noted: 'Whilst the listed status of buildings within the Conservation Area has contributed to the preservation of its character and appearance, there have been alterations, particularly to unlisted buildings, which are beginning to diminish the visual quality of some parts of the Conservation Area.'
This plan aims to ensure that the Conservation area does not suffer deterioration in the future.
To address this issue, we have this objective:

Objective 7.3 to maintain and enhance the town's conservation area and the settings of listed buildings. This objective conforms with Objective 7.2 will be achieved by policy H3

Policy H3 Development within the Crediton Conservation area

Development proposals should preserve or enhance the character and appearance of the Conservation area in accordance with national policy and the development plan.

7.4 Crediton Station

The issues

Even though the household survey showed that more than half of all residents hardly ever or never take the train from Crediton, 95% of respondents agreed that Crediton's railway station is an important asset and the Neighbourhood Plan should include policies that protect it. There are regional plans for increasing the number of trains calling at Crediton and it could become the first part of Crediton seen by visitors and tourists arriving by train. It is therefore

in the interests of residents and the tourism and leisure sector to ensure that its heritage qualities are not compromised by poorly located and/or poorly designed development that would have a negative impact on the Station and associated buildings and infrastructure.
To address this issue, we have this objective

Objective 7.4 to promote Crediton station as part of the built heritage of the town and protect it from negative impacts of development. This objective conforms with LP S1 m) NPPF 185 Objective 7.4 will be achieved by policy H4.

Policy H4 Crediton Station

Crediton Station buildings and signal box form an important part of the heritage of Crediton Neighbourhood Plan area. Proposals which affect this group of buildings will only be supported where they are fully in compliance with National Policy and the Development Plan.

5 Retrofitting energy measures

The issues

Heritage assets sometimes fall into disrepair or deteriorate in value and quality because they are difficult to heat and light. We aim for the historic buildings of the town to continue to be useful and sustainable into the future.
To address this issue, we have the following objective.

Objective 7.5 promote appropriate energy efficiency improvements to historic and traditional buildings which improve comfort levels and reduce CO2 emissions whilst conserving their heritage value. This objective is in accordance with LP S7 2.50. Objective 7.5 will be achieved by policy H5.

Policy H5 Retrofitting energy measures

The sensitive retrofitting of energy efficiency measures and the appropriate use of micro-renewables in historic buildings will be encouraged, including the retrofitting of listed buildings, buildings of solid wall or traditional construction and buildings within conservation areas, subject to conformity with national policy and the development plan.

8 Environment

Key objective: to maintain the town's setting between the rivers Yeo and Creedy, and all its green infrastructure with enhanced biodiversity.

Context

One of the characteristics most appreciated about Crediton is its rural setting and easy access into the countryside. Development will inevitably impact on both but policies elsewhere in the plan aim to retain them as far as possible. The impact of development is lessened where it is well integrated into the existing landscape and where the adjacent landscape is maintained or improved in order to increase its attractiveness, its biodiversity and its usability for all residents.
This plan aims to avoid the degradation of land that is adjacent to new development that becomes vulnerable simply because of its proximity to a new built environment and/or its insignificance of size and position.
If landscape degrades, it becomes vulnerable to development. (MDDC Landscape character assessment p64)

Crediton has a surprisingly varied habitat types within the town boundary (Fig 4 on page 46) which offers a variety of activity areas as well as green infrastructure and opportunities for biodiversity. This landscape is important to the town.

8.1 Open spaces

The issues
Infilling in towns can be an easy option for achieving development but it can lead to a highly urbanised townscape. It is tempting to think that parks, amenity land and other open areas will not be developed but this is not the case. They can be vulnerable to creeping developments of varying kinds, which gradually change the character of the space itself as well as the built area around it. These kinds of changes can be very difficult to reverse.
To address this issue we have this objective:

Objective 8.1 to protect existing open spaces. This policy is in accordance with NPPF 97. Objective 8.1 will be achieved through policy En1 in accordance with NPPF 97 paragraphs a) b) c)

Policy En1 Open spaces
Map 4 (see Appendix 1, p54) identifies open spaces that make a significant contribution to public amenity by virtue of their landscape character, biodiversity, appearance and or function, including playing fields and sports and recreational buildings.
Development proposals for building within these open spaces or affecting sports and recreational buildings will not be supported unless:
- an assessment shows the affected land or facility is surplus to requirements
- the land or facility is being replaced elsewhere at equivalent or superior quality
- the development provides alternative sport or recreation on the site, delivering benefits that outweigh the loss of the existing facilities and uses.

8.2 Trees and hedgerows

The issues

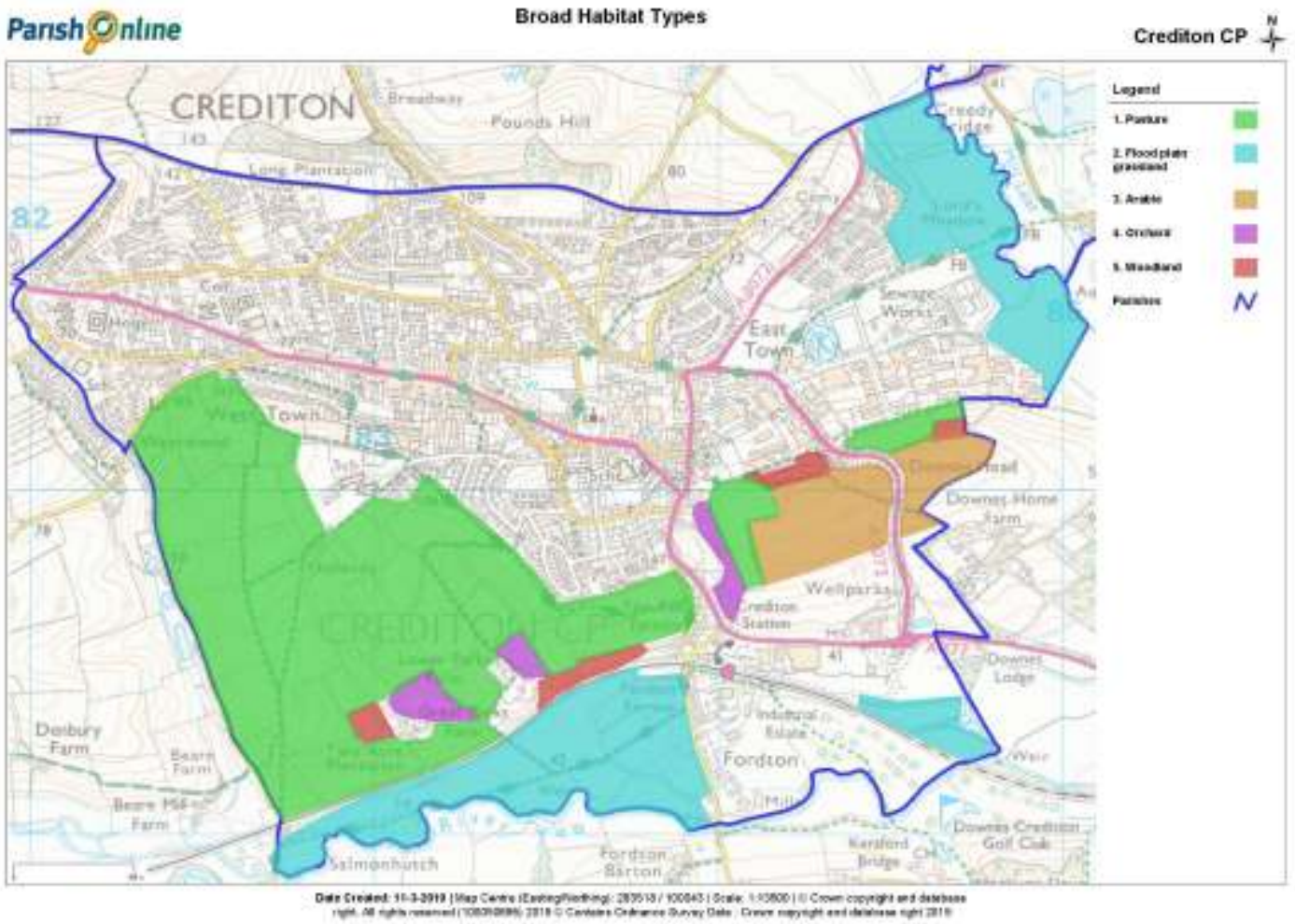
Every consultation since 2009 has supported the greening of areas in all parts of the town. Trees are constantly mentioned as missing from the townscape. The town council frequently receives requests for planting of trees in the public realm. This public support runs alongside our ambitions to mitigate the effects of climate change and to increase biodiversity. Keeping what we already have becomes a priority. There is therefore great concern when development compromises or proposes the removal of existing trees. We know from recent developments that sympathetic design can integrate mature trees into the proposals, so that new buildings and entire housing estates can fit compatibly into the landscape. Retaining trees and groups of trees helps to maintain biodiversity, green corridors, and air quality as well as improving the public realm and achieving a sense of place so there is a multiplicity of reasons for retaining existing trees as far as possible.

New development presents opportunities to enhance tree and hedgerow cover for the ecosystem services they provide. Such opportunities include: returning trees to boundaries or other areas from where they may have been removed in the past; restoring appropriate native species to the landscape; increasing tree canopy; contributing to the town's green corridors and to wider ecological networks and ecosystems. Trees also make a strong contribution to place-making, especially on smaller developments where there are open spaces but no landmark public buildings.

To resolve this issue we have this objective:

Objective 8.2 to fulfil the parish's duty under legislation to conserve biodiversity by: retaining trees of good quality, and notable, veteran and ancient trees within or affected by developments; by retaining and enhancing tree and hedgerow cover for the multiple benefits they provide; by ensuring that adequate and appropriate tree planting is included in the plans for new developments; by adopting the mitigation hierarchy – avoid losses, mitigate/enhance in association with the proposal or compensate as a last resort. This objective conforms with Town and Country Planning Act 1990 s197, Natural Environment and Rural Communities Act 2006 s40, NPPF 174 a) 175 c) LPR S1 l) Objective 8.2 will be achieved by policy En2.

Fig 4 Broad habitat types within the town boundary



Policy En2 Trees

In order to improve and increase tree cover in the plan area and to retain and enhance green corridors and the street scene and to capture carbon, the following principles of retaining, avoiding harm, enhancement and compensation will apply:

1 **Retain** Development proposals should seek first to retain existing trees and hedgerows on the site; in particular, mature or important trees, groups of trees, orchards or woodland should be included in the layout design of the development and therefore be included in the landscape plan itself.

2 **Avoid harm** Development resulting in the loss or deterioration of irreplaceable habitats (such as ancient woodland or veteran trees) should be refused unless there are wholly exceptional reasons and a suitable compensation strategy exists. The following principles should guide the design of a development where ancient woodlands or veteran trees may be affected:

- Provide unequivocal evidence of exceptional need and benefits of any proposed development, and the design of that development, that puts these individual trees, groups of trees or ancient woodlands at risk
- Establish likelihood and type of any impacts through arboricultural impact assessment
- Provide adequate buffers, including to root structures, and follow all guidance in BS 5837 during demolition/construction to demonstrate compliance with this policy expectation.

3 **Enhance** Proposals should include additional amenity tree and hedgerow planting wherever possible in order to: enhance the setting of the development; mitigate the impact of the development on the landscape; contribute to the street scene within the development.

Proposals that include new trees or hedges (whether replacement or additional) should include plans that fulfil the following principles:

- Contribute to increasing the tree canopy both through tree planting and natural regeneration.
- Contribute to the wider ecosystem and taking the opportunity where possible to link to or add to the identified green corridors shown on Map 5 (page 55)
- Demonstrate biodiversity net gain
- Use (or allow to naturally regenerate) a diversity of native species ecologically appropriate to the site and to climate change predictions (unless otherwise approved by a qualified ecologist)
- Source new trees grown in the UK, or from a nursery with sound biosecurity measures, to help avoid the spread of disease.

4 **Compensate** Where, as a last resort, felling of trees and removal of hedgerows is unavoidable, the landscape plan must include appropriate replacement trees and hedgerows in a suitable location or locations that will: increase the canopy cover compared to what was lost; demonstrate biodiversity net gain; benefit ecological networks; improve the street scene.

In circumstances where compensation cannot be delivered on site, arrangements to compensate elsewhere, through financial contributions to offsite tree planting (including management costs) should be explored.

8.3 Flood plains

The issues

Due to its setting between two river valleys, Crediton has large area s of flood plain within its boundary. These areas are vulnerable to development that could impact on the landscape. Their flood risk assessment means they are generally restricted to industrial or commercial use. Any development of this type is likely to put function and economy first and consideration of its impact second, if anywhere. Moreover, recent proposals have included changing the environment in order to achieve the development by level-raising to make use of flood plain land, reducing its extent and getting closer to the rivers. The more that engineering works are able to make flood plains useable, the more vulnerable they become.

These areas are important to the town setting, and to views into and out of the town, so development that impacts on them can be significant and create precedent for the way they are regarded in the future.

To help resolve this issue we have this objective:

Objective 8.3 to protect the town's floodplain landscape from the impact of development. This objective conforms with NPPF 170 a) and LP S1 k)

Objective 8.3 will be achieved by policy EN3.

Policy En3 Flood plains

Proposals for development must comply with national and local flood risk policy and guidance and demonstrate that they do not increase flood risk elsewhere. In addition, any proposals for development within the floodplain should, where appropriate, be supported by detailed information which demonstrates how the development will protect and mitigate damage to the floodplain landscape, including, but not exclusively, river margins, leats and floodplain grassland and should include an appropriate landscape treatment and planting scheme that will help to blend the development into the existing landscape.

8.4 Green infrastructure

The issues

National policy aims to turn around the recent trend towards loss of biodiversity. We are keen to play our part in this by having strong policies towards developing it and maintaining the opportunities we have. We have started to map our green infrastructure and corridors but there is a lot further to go in assessing its quality and effectiveness. In achieving biodiversity. As a first step we aim to ensure that no further damage or loss occurs that is avoidable.

To help resolve this issue we have this objective:

Objective 8.4 to protect and restore biodiversity and natural habitats by maintaining and extending green infrastructure

This objective conforms to 174 b) 175 d) LP DM27 b) Objective 8.4 will be achieved by policy En4

Policy EN4 Green infrastructure

Map 4 (Page 54), open spaces illustrates the green infrastructure network for the Crediton Neighbourhood Plan area. Developments that would damage or impact negatively on the green corridors shown on Map 5 (Page 55), Green Corridors will not be supported unless the corridor can be maintained by alternative planting nearby. Developments that extend or retain green corridors will be supported.

8.5 Views and vistas

The issues

The Crediton landscape is classified as lowland plains which is described thus: Lowland plains: Landscape typically has short vistas terminated by a backdrop of curving hills with occasional long views from prominent locations. (MDDC Landscape Character Assessment) Typical photographs of the town show buildings huddled into the valley with small hillside fields and woodland as the back drop. Views from highpoints around the town are of large fields looking towards the hillsides around the town and from particular points as far as Dartmoor to the South West and Exmoor to the north east. From public footpaths and roads there are views along and across the Creedy and Yeo Valleys. Development will inevitably impact on some of these but well-designed proposals that consider its site in the landscape can be integrated into a valued vista, helping to retain the town's setting and contributing to creating and maintaining a sense of place.

To help address this issue we have this objective:

Objective 8.5 to protect views from the built townscape into the town's lowland plains rural setting, especially across the Creedy Valley and the Yeo Valley, and views from the town's rural setting towards the built townscape especially across the Creedy Valley and the Yeo Valley. This objective conforms with NPPF 125, 127 b) c) d)LP S1 h)

Policy En5 Views and vistas

Developments that would damage or impact negatively on the view from Downeshead shown in Map 6 (see Appendix 1, p56) will not be supported unless the development includes landscaping and/or planting schemes that reduce the negative impact to an acceptable extent. Developments that would remove the view entirely will not be supported.

3 Appendices

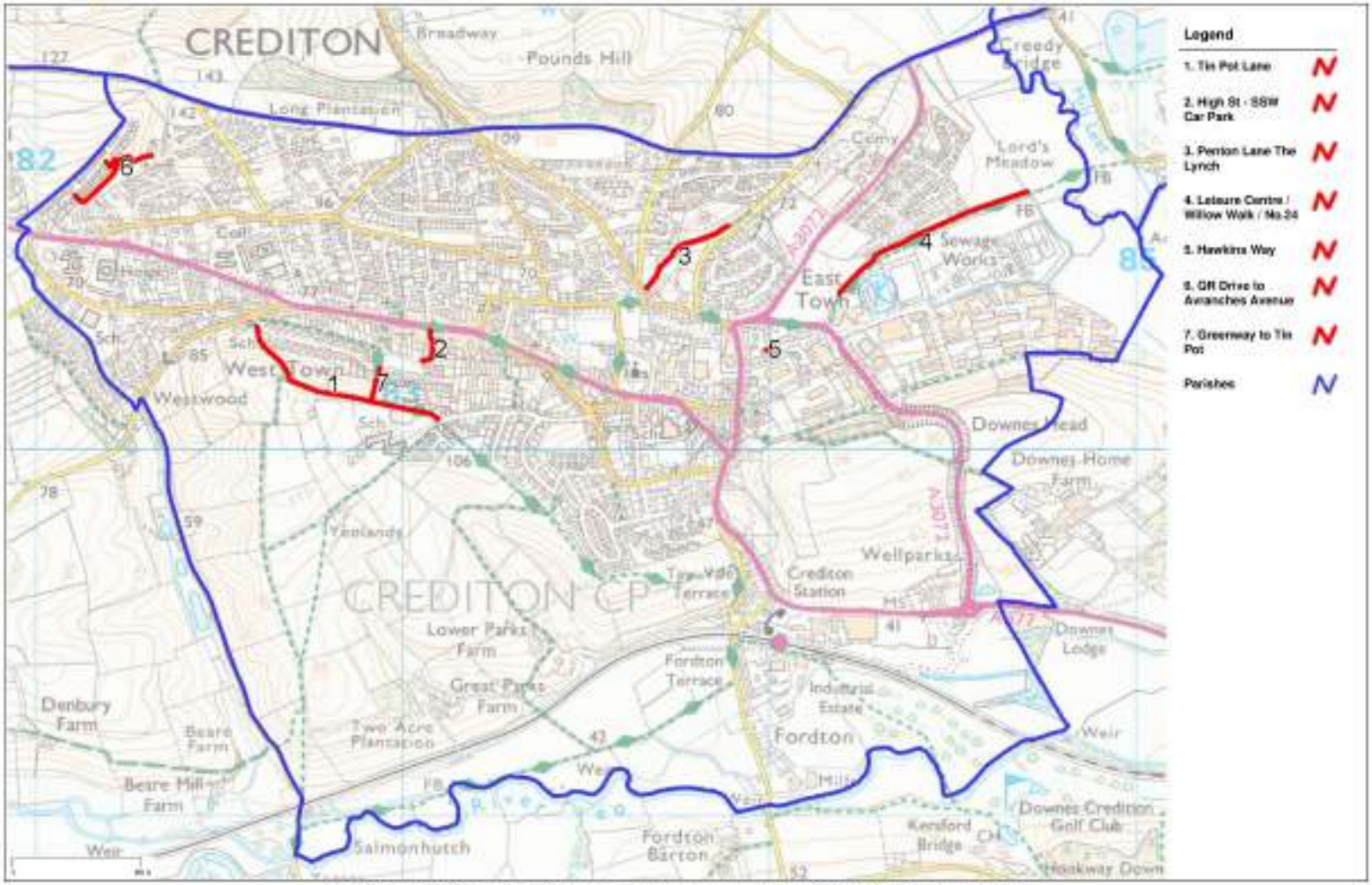
Appendix 1 Maps

Appendix 2 Plan statements

Parish Online

Map 1 Footpath Improvements

Crediton CP



Date Created: 25-11-2018 | Map Centre (Easting/Northing): 283504 / 100614 | Scale: 1:13500 | © Crown copyright and database right. All rights reserved (100050695) 2018 © Contains Ordnance Survey Data : Crown copyright and database right 2018

Parish Online

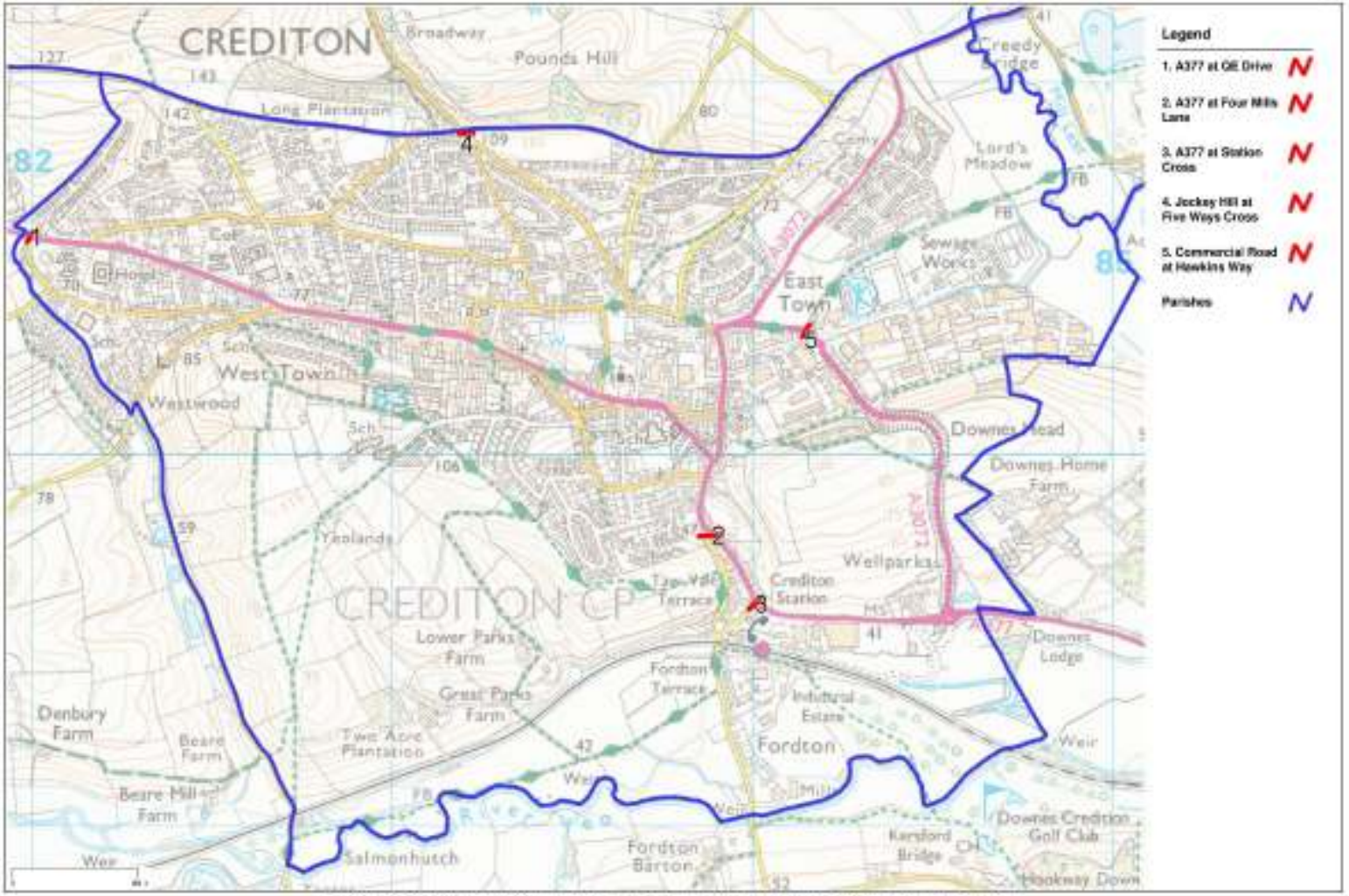
Map 2 Additional Footways

Crediton CP

Parish Online

Map 3 Crossing Point Projects

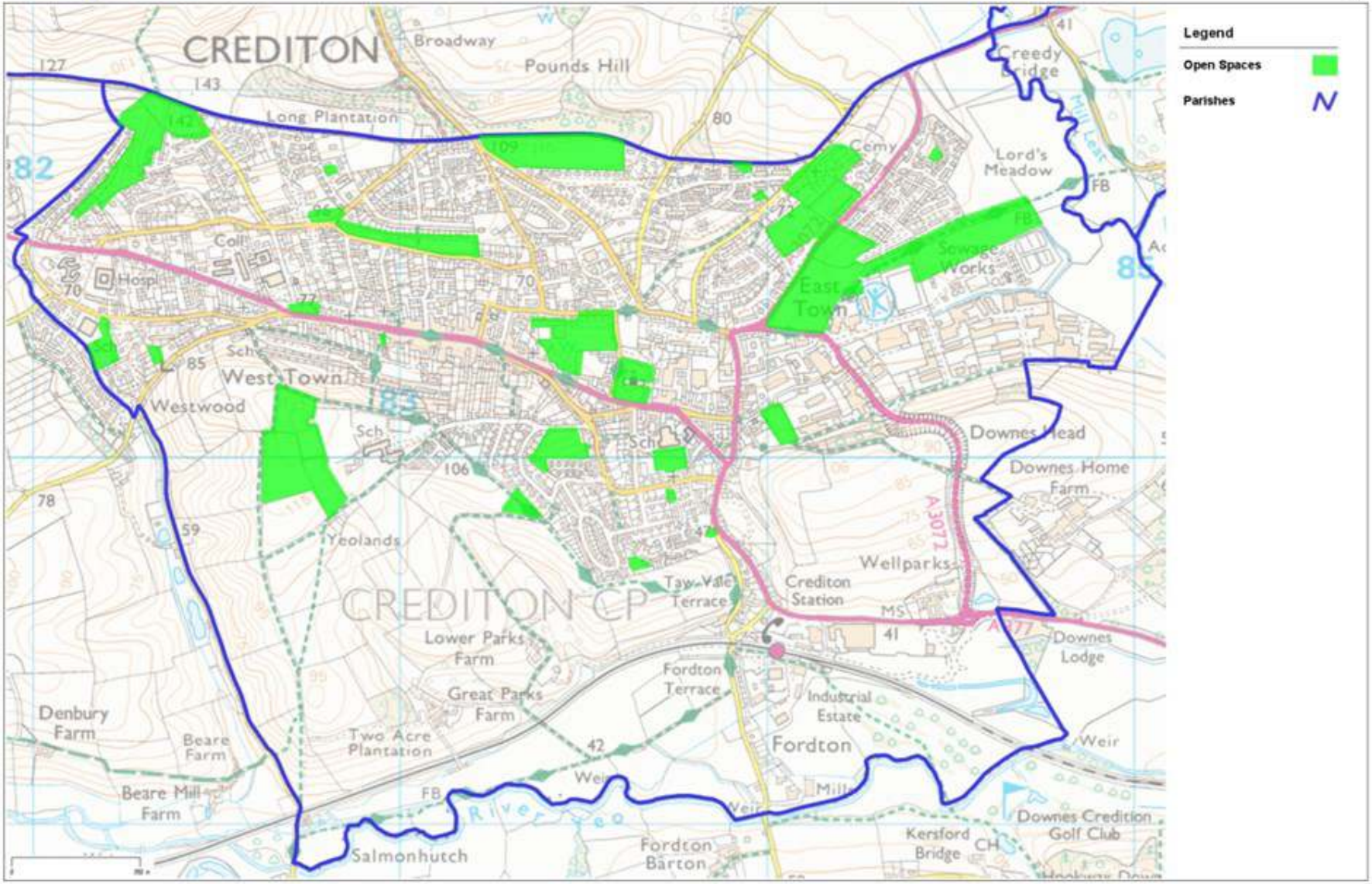
Crediton CP



Parish Online

Map 4 Open Spaces

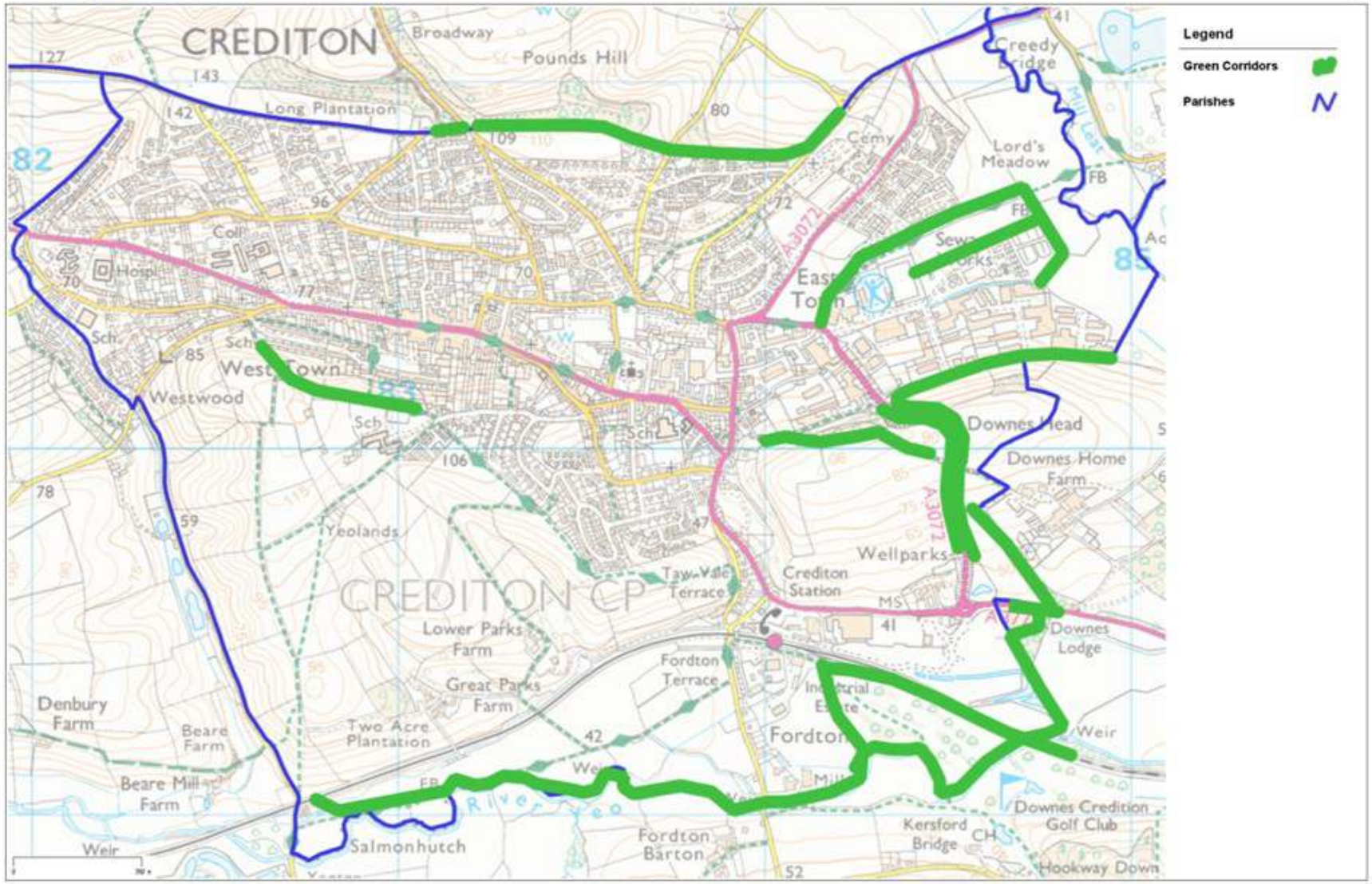
Crediton CP



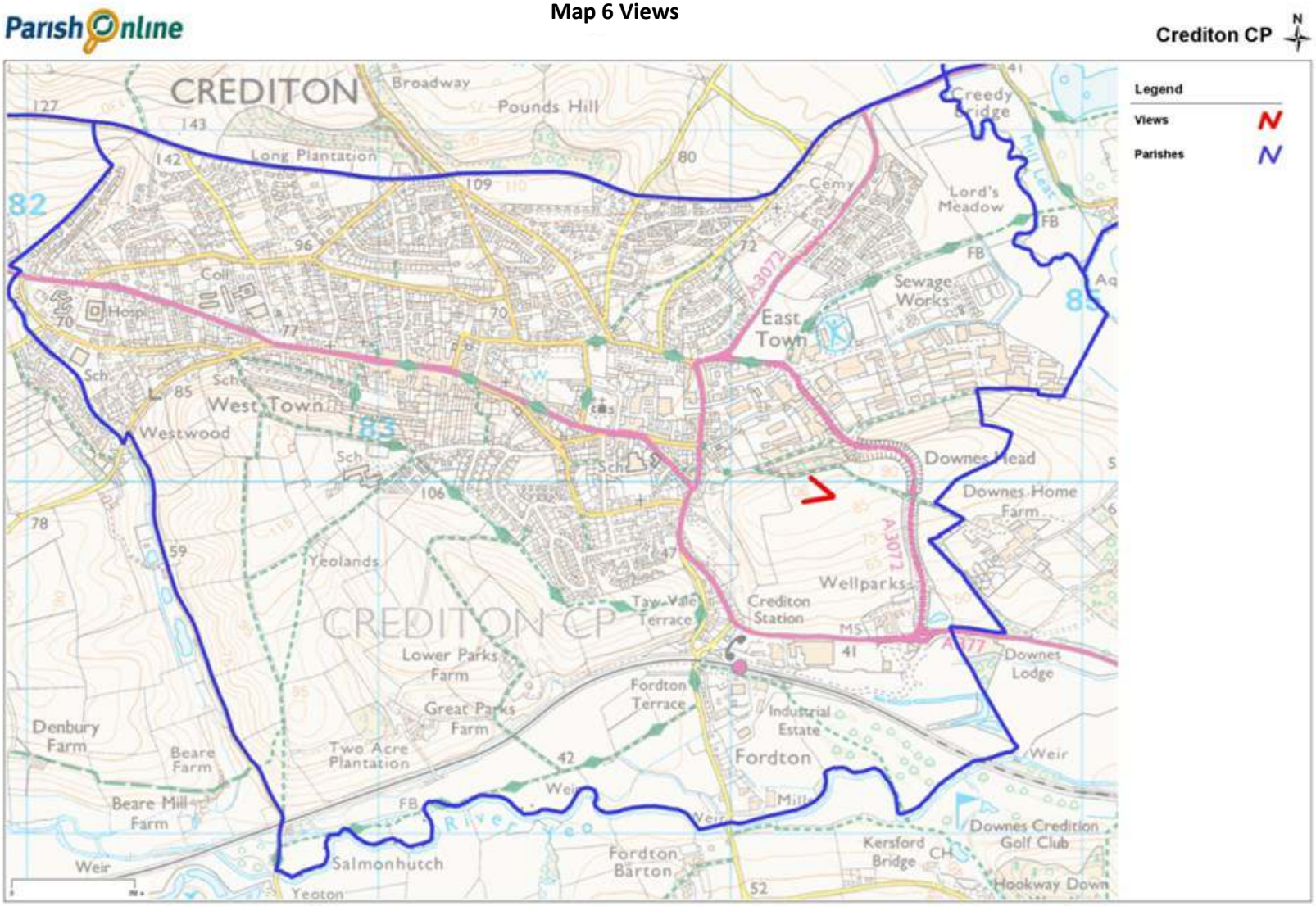
Parish Online

Map 5. Green Corridors

Crediton CP



Map 6 Views


Parish Online
Crediton CP
N
Legend
Views
Parishes
CREDITON
Broadway
Pounds Hill
Long Plantation
Creedy Bridge
Cemy
Lord's Meadow
FB
Sewage Works
East Town
A3072
West Town
Westwood
Sch
Coll
Hosp
Downes Head
Downes Home Farm
Yeolands
CREDITON CP
Taw Vale Terrace
Crediton Station
Wellparks
Lower Parks Farm
Great Parks Farm
Two Acre Plantation
Fordton Terrace
Industrial Estate
Fordton
Downes Lodge
Denbury Farm
Beare Farm
Beare Mill Farm
Weir
Salmonhutch
Fordton Barton
Kersford Bridge
Downes Crediton Golf Club
Hookway Down
Yeoton
Date Created: 20-12-2018 | Map Centre (Easting/Northing): 283524 / 99998 | Scale: 1:13500 | © Crown copyright and database right. All rights reserved (100050695) 2018 © Contains Ordnance Survey Data : Crown copyright and database right 2018

Appendix 2: Plan statements

High Street Vision statement

The noise, traffic movement and pollution in the High Street were identified by residents as being major negative factors for living in Crediton.
This Plan has policies aimed at reversing these characteristics to make the High Street a positive aspect of living in the town and the town centre itself. The policies are based on the following needs which have been identified through surveys over the last 8 years:

Pedestrian first principles

The High Street is the principal road in the town where the vast majority of shops and services are located. Residents value the town centre highly and there continues to be considerable footfall. The High Street area should accommodate the needs of shoppers and visitors as well as vehicles. Presently, the focus is on vehicle movement but the vision is to achieve redevelopment on pedestrian first principles

Easy crossing

Currently, there are few dedicated or safe crossing points. Pedestrians are frequently forced to take a circuitous route to get from one side of the road to the other; to wait for traffic signals or for vehicles to give way in order to cross. Drivers are often willing to give way where there are obvious pedestrian crossing points but where the width of the road favours the driver, vehicles speed up and are not likely to accommodate pedestrian movement. Easy crossing along the length of the High Street is something we would like to achieve.

Desirable destination

While the High Street is an A class road (though not part of the strategic road network west of Crediton), it is nevertheless the heart of the town centre. As the town spreads and competing out-of-town-centre retail increases along with internet shopping, the main purpose of the High Street is changing from the main retail location to other uses. If these are to be fully realised, the High Street must be an attractive destination of a type and quality that offers something that competing locations do not have.

A multi-use area

retail – for many residents, especially those in the town centre or without their own car, the High Street continues to be the main shopping area
services – businesses and professional services continue to locate in the town centre and these still bring footfall to the High Street
centre for community celebrations, activities – the High Street offers a location for community projects like the flags, live music and Christmas lights, with the town square as a performance area close by

leisure – the town is well served with cafes and pubs, some of which have on-street facilities or pavement frontages with views onto the High Street and for these businesses, how the High Street operates has an impact on their customers

sustainable transport – buses to destinations along the A377 pass along the High Street, are well used and the needs of passengers need to be accommodated

heritage – many of the town's important buildings are on the High Street and are a key factor in the town's historic character as well as being buildings in daily use

tourism – visitors to Crediton are bound to visit the High Street for the historic buildings, the museum, parking, shops, and food outlets, so the impact of the High Street will directly affect the visitor's experience.

attractive and functional environment

It is well known that trees absorb CO2 which can help with air quality but to date it has been impossible to take advantage of the street's width to gain any permanent planting of this type. Residents have often suggested trees would improve the look of the High Street. Other types of planting may also be possible. There is a strong liking in the town for floral decoration and planting of all kinds. At the same time, the High Street must function well for people with mobility difficulties, for wheelchair and mobility scooter uses, as well as parents with prams and shoppers with trolleys.

managed traffic flow

It is understood that standing traffic, engines running, is the most polluting, therefore infrastructure that causes vehicles to halt and queue, such as lights and stationary buses are not desirable. Equally, 40 ton lorries travelling at 30 mph through the High Street may be emitting fewer polluting gases but they are creating noise and movement which make being within a few metres an unpleasant experience. This plan aims to pursue measures that would create a medium between no movement and the fastest movement.

sustainable fabric

Repairs and renewals of surfaces and infrastructure are expensive and disruptive. Any redevelopment should use materials that look suitable and which wear appropriately for the purpose.

sustainable drainage

The camber of the road is unusually severe which can make pedestrian movement difficult from north to south. It also carries the threat of flooding in sudden rain events to businesses on the north side. Changes to the road might give opportunities for sustainable water collection/drainage in the High Street with associated planting. This would be preferable to underground water drainage taking surface water away to local rivers.

Town centre and Traffic Action Plan

The Town Council will continue working with the county and district councils, traffic consultants, the Access Group and community representatives to promote and achieve the proposals in the Crediton Urban Traffic Study in order to improve air quality, driver behavior, pedestrian and cyclist facilities, and the public realm.

Sustainability statement

Crediton is committed to the principles of one planet living. We only have one planet and need to live within its capacity. At present within the UK, we are consuming resources at a rate that would require the equivalent of three planets if everyone shared our life style. And our current life style is contributing to increasing levels of global warming which are already having harmful effects in many parts of the world.
Our aim is to create a community which is less dependent on fossil fuels, more reliant on its own resources, actively working to reduce carbon emissions and finding ways to improve air quality in the town.
This has implications for all parts of the Neighbourhood Plan. The principles that flow from this and our aims are as follows:
- to make buildings more energy efficient and to deliver energy with renewable resources.
- to reduce waste, reuse and recycle.
- to encourage low carbon modes of transport and reduce the need to travel.
- to use sustainable materials, sourced locally and made from renewable or waste resources.
- to buy food that is grown locally and reduce food waste
- to use water more efficiently and tackle local flooding and water course pollution
- to protect and restore biodiversity and natural habitats, through appropriate land use.

Heritage statement

The town's historic character

Crediton has many fine 18th and 19th century buildings, many of which are Grade II listed, and most of which are found along the High Street. The architectural styles are therefore mainly Georgian and Victorian - these new developments having replaced the Tudor and Stuart buildings, many of which were lost in the Great Fire of 1743 and others subsequently.
The centuries of new building also coincided with the industrial age when the town was the centre of production from raw materials from the agricultural farms and communities around. Crediton was known for its dyed woollen cloth and tanneries. These industries produced the wealth that was needed to create a town of significant buildings reflecting the aspirations of the inhabitants.
In the 19th century the population rose to around 8,000 which is a little more than now, all living in a much smaller town than it is today.

New development

It is surprising to note how little the street pattern has changed in 200 years, in spite of the amount of new building that has gone on, especially in the last 70 years. Some of that development will be the listed buildings of the future and it is always worth keeping an eye on quality buildings of the modern era. Crediton people value the built heritage but recognise that old buildings will often need to be put to new uses.

This plan supports the protection of our heritage while seeing it as having an essential role in the daily life of the town now and in the future. Heritage buildings and street scenes may be enhanced by sensitive development. Equally, the importance and character of them must be appreciated and acknowledged if development is not to have a negative impact simply through lack of awareness or care. Hence the significance of identifying and listing assets.

Heritage listing

A list of heritage assets will include a wide range, from the most well-known impressive buildings to rows of humble cottages, and from the historic parks to ancient footpaths. The purpose of this approach is to develop a description of the town's historic character that defines its local distinctiveness.

It will also list the historic public open spaces, features of the public realm and of the natural landscape that gives the town its much-valued rural setting.

These lists will give a reference to enable any future development to be done with respect to the town's heritage and give the opportunity to not only protect but to enhance what already exists.

Heritage Action Plan

Keep an updated list of heritage assets, including landscape heritage assets
Record all currently listed buildings
Review the 2003 Conservation area appraisal
Consider buildings suggested for future listing in the 2003 Conservation area appraisal

Biodiversity Statement

Within the town boundary there are five broad habitat types (see fig 4, p46) pasture, flood plain grassland, arable, orchard, woodland. These habitats contain varying amounts of wildlife. None of the area in the town boundary is of sufficiently high value to be included in the list of County Wildlife Sites or have any statutory wildlife conservation designation. The interest and value are essentially local.

However, given that the town setting and green spaces in the town are so highly valued by residents, it is important to know what they contain and how they can best be managed to conserve and increase biodiversity.
The Neighbourhood Plan Environment Action Plan proposes an environmental audit. In the meantime, this statement identifies approaches to biodiversity of particular areas inside the town boundary, including protection, retention, maintenance, improvement, enhancement and identification of new opportunities.

Existing areas to protect and enhance

Green corridors (see map 5)

Connected areas of green space forming long corridors across an area give greater opportunities for biodiversity as species have a more extensive habitat that has greater potential to support sustainable populations.
According to Mid Devon District Council's assessment, the town is underprovided with amenity space and much of the other green infrastructure of the town is either small, disconnected or private. However, it is possible to identify two areas at the town edges where green infrastructure is more or less connected over a distance (notwithstanding administrative boundaries) forming a corridor. These generally start outside the town boundary and/or follow the boundary and link to green infrastructure that is **inside the town boundary or inside the settlement limit**. Some of these areas could be better connected and better maintained.

1 South

Hookway woods / **golf course**/ woodland next to Kersford weir/ **land south of Mole Avon** / woodland next to A377 / woodland beside footpath 6

2 North

Amenity land QE Drive/Avranches Avenue / Long Plantation / Creedy Park woods / Stonewall Lane hedges / **Pedlerspool development** / Longbarn Lane / Creedy Park woods/ **Pedlerspool Lane / cemetery**

Orchards

Many old orchards have been lost to development, some of them quite recently. Those remaining are valuable habitats. They include the orchard behind Fair Park and one each at Great Parks Farm and Lower Parks Farm.
New orchards that have been planted to the south of the Barnfield area should also be protected from negative impacts of development.

Biodiversity Improvement opportunities

Existing open spaces, such as parks and wide verges offer opportunities for additional planned planting and management of trees and shrubs to increase biodiversity. This could include green planting where none currently exists – especially industrial areas which can look bleak and unkempt as well as presenting a significant break in the green infrastructure of the town.

There are opportunities for improvement in the maintenance and care of wet areas such as issues, drains, leats and balancing ponds
Within the town settlement, gardens, hedges, trees and verges can be important habitats for species, including pollinators, small mammals and reptiles, a surprisingly wide variety of which is seen in all parts of the town. An increase in planting and discouragement of removal of habitats without replacement is to be encouraged.

New biodiversity opportunities

New housing developments
When new residential areas are created there is the opportunity to develop and plant out open spaces, amenity land, and Sustainable Drainage Systems to the benefit of biodiversity.

Town Centre development
High Street redevelopment may offer opportunities for tree planting that can benefit pollinators as well as greening the urban area.

Employment sites
Likewise, industrial and employment areas offer the chance to encourage planting of trees and development of green walls where there is little planting space.

Environmental Action Plan
Carry out an environmental audit of habitats, parks and open spaces.
Investigate strategy for encouragement of maintenance and management of trees and hedges
List veteran trees
Adopt a policy for pollinators
Ensure developers' requirement to improve biodiversity by having a biodiversity strategy for new developments
Investigate possibilities for improving biodiversity in public parks and open spaces
Investigate possibilities for improving and/or extending green corridors shown in Map 5
Investigate possibilities for permissive footpath connections between habitats comprising green corridors and linking existing footpaths to create a green circle around the town.

Appendix 3: Community Action Plan

Community Action Plan

Development Action Plan

Design

The Town Council will use the district council's Design Guide to help assess applications alongside the Crediton Design Statement

Housing

In order to become more familiar with housing issues and needs, and different means of delivering homes, the town council will:
consider commissioning a Crediton-specific Housing Needs Assessment
investigate Community Land Trusts

Town centre and Traffic Action Plan

The Town Council will continue working with the county and district councils, traffic consultants, the Access Group and community representatives to promote and achieve the proposals in the Crediton Urban Traffic Study in order to improve air quality, driver behaviour, and pedestrian and cyclist facilities.

Heritage Action Plan

In order to retain the town's heritage as far as possible, the town council will:
Keep a record all currently listed buildings
Keep an updated list of heritage assets, including landscape heritage assets
Review the 2003 Conservation Area Appraisal
Consider buildings suggested for future listing as mentioned in the 2003 Conservation Area Appraisal

Environment Action Plan

In order to maximise the potential of the town's environment, the town council will:
carry out an environmental audit of habitats, parks and open spaces
Investigate requirements for managing trees and hedges

List veteran trees
Adopt a policy for pollinators
Ensure developers' requirement to improve biodiversity by having a biodiversity strategy for new developments
Investigate possibilities for improving and/or extending green corridors
Investigate possibilities for improving spaces
Investigate possibilities for permissive footpath connections between habitats comprising green corridors and linking existing footpaths to create a green circle around the town

In addition to the Action Plan, the town council has the following intentions:

Community Facilities

The town council will support community-led enterprises, including proposals which develop facilities for employment, social interaction and/or well-being.

Transport

Crediton Town Council will support
proposals to further develop town plans and maps specifically designed to show connectivity between areas of the town and leisure routes around the town and its setting.
sustainable proposals to improve and extend existing commercial and community operated bus services and facilities, especially to service new development sites
the development of the Boniface Crediton/Exeter dual use trail

Sustainability

The town council will
promote recycling of waste materials and facilities for the re-use of items and materials.
encourage the purchase of locally produced goods and services
encourage energy efficiency

Heritage

The town council will support proposals that promote our St Boniface heritage.

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October 2022

Crediton Neighbourhood Plan

ADOPTION DECISION STATEMENT

REGULATION 19 – THE NEIGHBOURHOOD PLANNING (GENERAL) REGULATIONS 2012

1.0 Summary

1.1 Mid Devon District Council is publishing its decision to 'make' the Crediton Neighbourhood Plan part of the statutory development plan for Mid Devon District in accordance with Regulation 19 of The Neighbourhood Planning (General) Regulations 2012. This follows a positive referendum result on Thursday 22nd September 2022,

2.0 Background

2.1 Crediton Parish Council (as the qualifying body) applied for Crediton Parish, in its entirety, to be designated as a Neighbourhood Area on 20th February 2014. The Crediton Neighbourhood Area was designated on 2nd July 2014.

2.2 The Crediton Neighbourhood Plan submission version was submitted to Mid Devon District Council on the 24th September 2021. Mid Devon District Council undertook the statutory consultation, in accordance with Regulation 16 of The Neighbourhood Planning (General) Regulations 2012, between 22nd November 2021 and 14th January 2022.

2.3. Mid Devon District Council, with the agreement of Crediton Parish Council, appointed an Independent Examiner (Barbara Maksymiw) to assess whether the plan met the Basic Conditions required by legislation; and whether it should proceed to referendum.

2.4. The examination into the Plan was carried out by written representations and the Examiner's report was issued on 13th May 2022. The report concluded that the Plan met the basic conditions and, subject to proposed modifications, that the Plan should proceed to a local referendum.

2.5 On 12th July 2022 Mid Devon District Council agreed the Examiner's proposed modifications and a typographical correction to the Crediton Neighbourhood

Plan, and agreed that the plan should proceed to a local referendum. A Decision Statement was also approved and published for this.

3.0 Decision and Reasons

3.1. The local referendum was held on 22nd September 2022 and met the requirements of the Localism Act 2011. It returned a 'yes' majority of 88.4%, to the question:

"Do you want Mid Devon District Council to use the neighbourhood plan for Crediton to help it decide planning applications in the neighbourhood area?"

3.2 The results of the local referendum were as follows:

Ballot papers	Votes Recorded
Number cast in favour of a Yes	719
Number cast in favour of a No	94
Number of spoilt ballot papers	0
Total number of votes cast	813
Electorate: 6173	Turnout: 13%

3.3. Following the positive referendum outcome, the Crediton Neighbourhood Plan was 'made' (adopted) by Mid Devon District Council at a meeting of the Council on the 26th October 2022.

3.4. It is considered that the Plan meets the Basic Conditions set out in paragraph 8 of Schedule 4B to the Town and Country Planning Act 1990; complies with the provision made by or under Sections 38A and 38B of The Planning and Compulsory Purchase Act 2004 (as amended); and is compatible with EU obligations and Convention obligations (within the meaning of the Human Rights Act 1998).

3.5. The Crediton Neighbourhood Plan now forms part of the development plan for the Crediton Neighbourhood Area (the parish of Crediton). In accordance with Section 38(6) of the Planning and Compulsory Purchase Act (2004), the determination of planning applications in Crediton Parish will need to be made in accordance with the development plan (i.e. the adopted Mid Devon Local Plan 2013 – 2033, the adopted Devon Minerals and Waste Plans, and the 'made' Crediton Neighbourhood Plan), unless material considerations indicate otherwise.

4.0 Where to view this Adoption Decision Statement

4.1. The Adoption Decision Statement can be viewed at:

Mid Devon District Council's Offices, Phoenix House, Phoenix Lane, Tiverton, Devon, EX16 6PP

Opening hours (via appointment, please contact 01884 255255):

- Monday - 9 am to 1 pm

- Tuesday - 9 am to 1 pm
- Wednesday - CLOSED
- Thursday - 9 am to 1 pm
- Friday - 9 am to 1 pm

Online on the Council's website: www.middevon.gov.uk/residents/planning-policy/neighbourhood -planning/crediton-neighbourhood-plan/

Crediton Neighbourhood Plan - MIDDEVON.GOV.UK

Tristan Peat,

Forward Planning Team Leader for Mid Devon District Council

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CABINET

4TH OCTOBER 2022

NON-STATUTORY INTERIM PLANNING POLICY STATEMENT: CLIMATE EMERGENCY

Cabinet Member(s): Councillor Richard Chesterton, Cabinet Member for Planning and Economic Regeneration

Responsible Officer: Richard Marsh, Director of Place

Reason for Report: To seek approval for the Non-Statutory Interim Planning Policy Statement to be published for public consultation

RECOMMENDATION:

To Cabinet that:

1) **The draft Non-Statutory Interim Planning Policy Statement: Climate Emergency (Appendix 1), including the Net Zero Carbon Toolkit (Appendix 2) and the Net Zero Housing Assessment Tool (Appendix 3) be approved for public consultation.**

2) **Delegated authority be given to the Director of Place in consultation with the Cabinet Member for Planning and Economic Regeneration to finalise the material and arrangements for consultation.**

Financial Implications: None identified

Legal Implications: The Non-Statutory Interim Planning Policy Statement will not have a Supplementary Planning Document status. However, it will be guidance and a resource which can be used by applicants to help inform the preparation of planning applications submitted to the Council for determination within the Mid Devon area. The Non-Statutory Interim Planning Policy Statement can help clarify how the requirements of existing development plan policies can be met in relation to climate change, which can assist the assessment of planning applications, and it underlines that tackling climate change is a material consideration.

Risk Assessment: None identified.

Budget and Policy Framework: The Non-Statutory Interim Planning Policy Statement will provide guidance that can assist the understanding and implementation of relevant policies in the statutory development plan for the district.

Equality Impact Assessment: The Non-Statutory Interim Planning Policy Statement will not in itself lead to any impacts on the equality strands protected under the Equality Act 2010 (the “protected characteristics”) over and above those considered and addressed through the Local Plan Equalities Impact Assessment, although it could be used to assist the achievement of climate ‘justice’.

Relationship to Corporate Plan: The Non-Statutory Interim Planning Policy Statement plan will help meet the Corporate Plan priorities: 'Homes', 'Environment', 'Community' and 'Economy'.

Impact on Climate Change: The Non-Statutory Interim Planning Policy Statement will supplement relevant policies in the adopted Local Plan where these are relevant to adapting to, and mitigating the impacts of, climate change through development in Mid Devon, and it will draw from current good practice and relevant legislation and statutory provisions since the Local Plan was submitted to the Secretary of State in March 2017 and subject to its independent examination.

1.0 INTRODUCTION / BACKGROUND

1.1 The decision to prepare a non-statutory interim policy statement on planning for the climate emergency was taken by the Cabinet at its meeting on 4th February 2021, together with the preparation of a new Local Plan for Mid Devon (Minute 304).

1.2 The adopted Local Plan has been prepared in the context of the 2012 National Planning Policy Framework and was examined under transitional arrangements. Its content pre-dates more recent national planning policy, the Council's adoption of the Devon Climate Change Declaration (26th June 2019, Item 18), and also technical evidence and policy formulation intended for the Greater Exeter Strategic Plan but which can be used to help inform the preparation of other development plans, programmes and strategies.

1.3 The preparation of a new Local Plan will provide the opportunity to include more up to date policies consistent with the current 2021 National Planning Policy Framework to help mitigate the impacts of climate change and move towards zero carbon, through a spatial strategy for the distribution of growth and managing the development and use of land and buildings. However, the preparation of a new Local Plan through a full plan review can take up to five years to complete.

1.4 Following the Cabinet decision (Minute 304) an interim planning policy statement has been prepared for Mid Devon (hereafter abbreviated in this report to 'Statement' – see **Appendix 1**). This can help clarify how the requirements of policies in the adopted Mid Devon Local Plan can be met in relation to climate change (e.g. Policy S1 Sustainable Development Priorities, and others where relevant) and it underlines that tackling climate change is a material consideration. The 'Statement' can also be used help inform the preparation of a new Local Plan. The 'Statement' includes guidance in relation to increasing accessibility, reducing the need to travel, and efficient movement of goods; improving energy efficiency; adapting to higher temperatures; mitigating flood risk; and resilience of natural systems and resources. The scope of content and detail of the 'Statement' has been shaped through a review of relevant policy hooks in the adopted Local Plan, and a Climate Emergency – Planning Applications Checklist including a set of principles and objectives developed by planning officers and the Council's Climate and Sustainability Specialist.

1.5 The recently published 'Plan Mid Devon Issues Paper' (January 2022) includes 6 top priorities for the future planning of the district and its places. Whilst the priorities are interrelated and each one is important in its own right, the first, and overarching, priority addresses 'responding to the climate emergency and moving to a net-zero carbon future'. However, Plan Mid Devon will not be adopted before 2025; therefore, there is a need to enhance existing policy considerations for all new development through the introduction of the 'Statement'.

1.6 The 'Statement' provides the following opportunities:

- It allows the Council to set out its expectations to applicants for planning permission for proposed development in Mid Devon, shape planning proposals that are submitted to the Council for determination, and be used to help inform the decisions made on these
- It can supplement relevant policies in the adopted Mid Devon Local Plan
- It will enable a greater focus on climate change and climate emergency matters in advance of a new Local Plan.
- It can be used to help inform the preparation of policies in the new Local Plan for Mid Devon ('Plan Mid Devon')

The 'Statement' and use of a 'Climate Emergency – Planning Applications Checklist' will help raise the profile and importance, and improve the transparency of climate change and climate emergency considerations in the planning process in Mid Devon.

1.7 However, the 'Statement' can include guidance only, it cannot introduce new planning policy, but it can draw from relevant legislation and statutory provisions.

1.8 The 'Statement' will be applicable to all applications for the development and use of land and buildings in Mid Devon (outside the Dartmoor National Park) that are submitted to the Council for determination. However, not all of its principles / objectives may be relevant in every instance and this will need to be considered on a case by case basis. Exemptions to the use of the 'Statement' will include development that is subject to 'permitted development rights' where there is no need to apply for planning permission.

2.0 RELEVANT POLICY BACKGROUND AND CONTEXT

2.1 Section 19 (1A) of the Planning and Compulsory Purchase Act 2004 (as amended) includes a requirement for development plan documents to include policies designed to ensure that development and land use contribute to the mitigation of, and adaption to, climate change.

2.2 Section 1 (1) of the Climate Change Act 2008 (as amended) includes a commitment to reduce net emissions of greenhouse gases (GHG) by 100% by 2050 (relative to 1990 levels). However, the Government's adoption of the sixth carbon budget in 2021, mandates a 68% reduction of GHGs by 2030.

2.3 Amongst the revisions to the National Planning Policy Framework (NPPF) 2021, a requirement was introduced for 'mitigating and adapting to climate

change, including moving to a low carbon economy' (paragraph 8(c)). This is supported by Paragraph 15 which 'support[s] the transition to a low carbon future'. While paragraph 153 states that plans should consider 'the long-term implications for flood risk … water supply, biodiversity and landscapes, and the risk of overheating from rising temperatures' on the future resilience of infrastructure and communities.

2.4 The preparation of the 'Statement' has also had regard to other legislation, introduced following the submission of the current Local Plan in March 2017 for its independent examination:

2.5 The Environment Act 2021 sets out new requirements for waste reduction, air and water quality, and emphasises the sustainable use of resources. It also introduces a requirement to enhance biodiversity, and places weight on the role of nature based solutions in addressing climate change.

2.6 The Building Regulations 2021 amendments introduce Part O 'Overheating in new residential buildings' to reduce overheating through passive measures. Part L 'Conservation of fuel and power' introduces a requirement for non-residential buildings to reduce baseline emissions by at least 31% (against 2013 Building Regulations), and 30% for new homes. Part S 'Infrastructure for charging electric vehicles' mandates that a minimum of one electric vehicle charging point must be provided for all new dwellings.

2.7 Net Zero Strategy: Build Back Greener 2021 contains commitments to increase onshore wind, solar and other renewable energy sources, and to facilitate higher levels of active travel within urban areas.

2.8 The Heat and Buildings Strategy 2021 advocates a whole lifecycle system, fabric first approach to decarbonising buildings, outlaws the installation of new and replacement gas boilers by 2035, and supports inclusion of heat pumps and heat networks in new development.

2.9 A Written Ministerial Statement (HCWS258) on Improving Water Quality and Tackling Nutrient Pollution July 2022 announced details of a forthcoming nutrient mitigation scheme. This will be aimed at reducing nutrient enrichment from phosphorus causing harm to habitats with subsequent loss of biodiversity. The scheme will affect new residential or commercial development, including student and tourist accommodation, within the Somerset Levels and Moors Ramsar catchment area.

2.10 Climate Emergency Declaration 2019. Mid Devon District Council signed the Devon Climate Emergency Pledge on 26th June 2019 and is aiming to become carbon neutral by 2030 (Net Zero greenhouse gas emissions). This is ahead of Devon County Council's commitment to realise this by 2050 and that of the sixth Carbon Budget, which sets a legally binding target for a 78% reduction by 2035 (compared with 1990 levels)[1].

[1] June 2021 http://www.theccc.org.uk/publication/sixth-carbon-budget/

2.11 The Mid Devon Climate Strategy 2020-2024[2] clearly identifies the role in that the planning system can lead in mitigating, and adapting to, climate change. To complement this, a variety of planning-related work streams are currently being implemented through the Mid Devon Climate Action Plan.

2.12 Due to the urgent need for action and the potential impact on delivery of housing and associated infrastructure, the Council is placing preparation for, and response to climate change at the forefront of its corporate agenda. This will ensure that environmental sustainability is considered alongside social and economic sustainability. This will, of necessity, require changes to existing planning policies, which will be explored during the preparation of Plan Mid Devon. This new Local Plan will cover the period to 2043, set within a vision that looks ahead to 2053. Alongside this is a commitment to update the Council's Air Quality Supplementary Planning Document (SPD). A draft Air Quality Supplementary Planning Document was reported to the Cabinet at its meeting on 6th September and approval sought to consult on this.

2.13 In April 2021 the Secretary of State recognised that 'the scale and urgency of the climate change emergency is such that tackling climate change is a material consideration to which significant weight should be attached'.[3]

3.0 CONTENT

3.1 The Non-Statutory Interim Planning Policy Statement: Climate Emergency ('Statement') at **Appendix 1** includes the following content:

1.0 Introduction

2.0 Purpose, Status and Content

3.0 Climate Emergency Context

Legislative Context

National and Local Policy Context

Future National and Local Policy Context

4.0 Climate Emergency – Planning Applications Checklist

5.0 Net Zero Carbon Toolkit

6.0 Net Zero Housing Assessment Tool

Appendix A Legislative, Regulatory and Policy Context

[2] https://sustainablemiddevon.org.uk/Media/sefbojtr/mddc-climate-strategy-2020-2024-v1-dec2020-ac.pdf

[3] APP/V2255/W/19/3233606 Secretary of State decision. Appeal by Quinn Estates Ltd and Mulberry Estates (Sittingbourne) Ltd against Swale Borough Council.

Climate Emergency – Planning Applications Checklist

3.2 The 'Climate Emergency – Planning Applications Checklist' provides guidance for applicants that can be used to help inform the preparation of planning applications submitted to the Council for determination, and also the decisions made on these. This can contribute to improving the quality of development and place making.

3.3 Policies of the adopted Local Plan have been scoped in terms of climate-related considerations. Policy themes have been derived from these and are included as a set of principles and objectives within the 'Climate Emergency – Planning Applications Checklist'. Relevant measures for consideration are listed alongside the objectives.

3.4 It is intended that applicants for planning permission will be expected to have regard to the principles and objectives contained in the Statement's 'Climate Emergency – Planning Applications Checklist' and show how these have been considered and used in preparing planning applications, and these principles and objectives will be used by the Council, alongside relevant development plan policies and policies of the National Planning Policy Framework in the consideration of planning applications that are submitted for determination. It is intended that the completed 'Climate Emergency – Planning Applications Checklist' will be published on the Council's website alongside other documents for each planning application being determined by the Council.

Net Zero Carbon Toolkit

3.5 The 'Statement' introduces a 'Net Zero Carbon Toolkit', which has been funded through the Local Government Association Housing Advisers Programme. The Net Zero Carbon Toolkit (**Appendix 2** to this report) explains how net zero carbon developments can be delivered through construction, and takes into account embodied carbon and operational energy requirements. The toolkit includes advice on different methods of design and construction to achieve and maintain a healthy and comfortable indoor climate.

3.6 Applicants for the development of new homes are encouraged to make use of the Net Zero Carbon Toolkit in the preparation of planning proposals. In doing so, this can help show how the principles and objectives of the Climate Emergency – Planning Applications Checklist, where relevant to new build homes, can be met.

Net Zero Housing Assessment Tool

3.7 The Council has developed a 'Net Zero Housing Assessment Tool' in association with the University of Exeter. This is presented in a .pdf format in **Appendix 3** for the purpose of this report, but will be published in the form of a functional spreadsheet (MS Excel) for the consultation on the 'Statement' and its use. The Net Zero Housing Assessment Tool can be used alongside the Net Zero Carbon Toolkit to evaluate the costs and benefits of a range of low carbon standards for new residential developments.

3.8 The Net Zero Housing Assessment Tool calculates the carbon performance of 4 dwelling typologies: 1- and 2-bed apartments, attached and detached houses for a range of fabric and building services specifications. It then sizes the required photovoltaic array to comply with Part L of the Building Regulations, and permits further improvements. This establishes the cost uplift needed to achieve user-selected performance standards, which can be compared with the lowest cost means needed to meet the minimum requirements of the 2021 Building Regulations amendments. The tool has the capacity to be updated should further amendments occur.

3.9 Applicants for the development of new homes are also encouraged to make use of the Net Zero Housing Assessment Tool in the preparation of planning proposals. In doing so, this can help show how the principles and objectives of the Climate Emergency – Planning Applications Checklist, where relevant to new build homes, can be met.

4.0 GROUPS CONSULTED

4.1 The Planning Policy Advisory Group (PPAG) was consulted on the Non-Statutory Interim Planning Policy Statement at its meeting on 12th September 2022. A number of matters were raised, including how the development sector will be engaged, and whether there will be exemptions to the use of the 'Statement'. This report has been updated following the PPAG meeting.

4.2 The Net Zero Action Group (NZAG) was consulted on the Non-Statutory Interim Planning Policy Statement at its meeting on 9th August 2022 and has been supportive of the work in progress. The Group has been advised that the scope of the 'Statement' is related to the policy content of the current adopted Local Plan, with some ability to go beyond in relation to more recent national planning policy and other relevant legislation. The Group has queried the ability to introduce energy efficiency standards which go beyond the current Building Regulations (2021); to do so would require additional technical work and understanding of potential impact on development viability.

5.0 NEXT STEPS

5.1 The 'Statement' will be subject to the following engagement:

- It will be published through a press release and be subject to a minimum of 6 weeks public consultation.
- A meeting of the Mid Devon Agents' Forum will be arranged for the 'Statement' to be discussed and comments invited on it.

All comments received within the consultation period will be carefully considered to help finalise the 'Statement' before it is brought back for consideration and approval at a future meeting of the Cabinet.

5.2 The 'Statement' is capable of being updated to reflect any changes in relevant legislation. Officers will keep this under review as necessary and in relation to progress made towards the completion of the new Local Plan (Plan Mid Devon). Officers will also keep the 'Statement' under review in light of how it is

used by the development industry and feedback provided, so it will be an effective tool to shape planning applications submitted to the Council for determination and that the information provided can be used to help inform decisions made on these.

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Circulation of the Report:

Councillor Chesterton - Cabinet Member for Planning and Economic Regeneration

Leadership Team, Finance, Legal Services and Equalities

List of Background Papers and Links:

Appendix 1 - Draft Non-Statutory Interim Planning Policy Statement: Climate Emergency

Appendix 2 - Net Zero Carbon Toolkit

Appendix 3 - Net Zero Housing Assessment Tool

Non-Statutory Interim Planning Policy Statement: Climate Emergency

Mid Devon District Council, Phoenix House, Tiverton, Devon, EX16 6PP

Final version to be published online at MidDevon.gov.uk and SustainableMidDevon.org.uk

Version Control

Version	Contributor initials	Approval by	Approval date
Draft 0.1	JB, IC.		
Draft 0.2	JB, IC.		
Draft 0.3	AB, JB, IC, JC, TP.		
1.0	AB, JB, IC, TP.	(Planning Policy Advisory Group)	16.09.2022
Consultation		(Cabinet)	TBC
QA Draft Final		(TP)	TBC
Final		(TP)	TBC

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Table of Contents

Foreword

The Planning process is at the foundation of the Council's action to help our communities at a time of climate change crisis.

Building *what the customer wants* is about investing in a better tomorrow *today*.

- Would you buy a new house if you knew it needed a retrofit within 5 or 10 years?

- Would you choose a home with sky high bills, if a nearby neighbourhood offered a super-insulated Net Zero home meeting its own energy needs with renewables?

- Would you expect a local authority to permit a development that fails to address the climate change emergency?

Mid Devon's new homes must enable residents to enjoy a healthy, comfortable dwelling – affordable to run and designed to protect people from the extremes of heat or cold, drought or flood.

Our rural heart of Devon is a hard-working, thriving, living landscape with immense reserves of skills, knowledge and innovation. Mid Devon's communities want to feel connected, and not just to the internet, but also with their fellow neighbourhoods and local businesses.

Commercial developments seeking opportunity and growth in Mid Devon will rely on well-connected, climate-resilient, carbon-cutting communities, infrastructure services and transport. The Local Plan and effective environmental policies will actually help to cultivate those resources for growth.

Mid Devon's Local Plan asks that applicants and developers consider their climate credentials and environmental sustainability for each proposal in a holistic manner, working in ways that enhance ecosystem services, alleviate risk, and enable our Net Zero future. Our interim planning policy statement and supporting guidance helps developers understand the ambitions necessary to help us address the climate change emergency.

Councillor Colin Slade

Cabinet Member for the Environment and Climate Change

1.0 Introduction

1.1 Mid Devon District Council signed the Devon Climate Emergency Pledge on 26th June 2019 and aims to become carbon neutral by 2030 (Net Zero greenhouse gas emissions).

1.2 To ensure due regard is given to climate emergency considerations in all aspects of Planning, the Council has published this statement and supporting guidance.

1.3 **Tackling climate change is a material consideration to the planning process, to which significant weight should be attached.**

1.4 **Therefore the Council will view and interpret development plan policies for Mid Devon in the light of the climate change emergency.**

1.5 Setting the climate emergency as a top priority connects to closely-related issues such as low-carbon design, energy efficiency, infrastructure resilience, living landscapes and ecological recovery (the Council already has a statutory duty to conserve biodiversity).

1.6 Accordingly, the Council will encourage applicants to engage in pre-application discussions with Planning Officers to incorporate best practice. Where necessary, evidence will be required as part of the submission of planning applications, including how policy requirements and legislative standards will be met.

1.7 Guidance and resources to support this interim planning policy statement include three key elements:

a) A **Climate Emergency – Planning Applications Checklist** for all development proposals;

b) Guidance in the form of a **Net Zero Carbon Toolkit**;

c) The MDDC **Net Zero Housing Assessment Tool** to be used to compare 'low carbon' standards for new residential development.

1.8 This interim planning policy statement highlights the most relevant legislation and standards at the time of writing, and explains how these relate to Council policies. Policy context and local consultation indicates a compelling case for action to address the climate emergency at a faster pace than much of the current policy could otherwise achieve.

2.0 Purpose, Status and Content

Purpose

2.1 The purpose of this interim planning policy statement is to supplement policies of the adopted Mid Devon Local Plan where these are relevant to climate change considerations, and to assist their implementation. These considerations encompass both mitigation (reductions in greenhouse gas emissions) and adaptation (dealing with the climate crisis risks). Therefore the scope goes beyond design and construction, and also seeks to address interlinked socioeconomic and ecological / biodiversity factors.

2.2 The Council has begun work on a new Local Plan for Mid Devon (called 'Plan Mid Devon'), which will provide an opportunity to introduce new policies to help us tackle climate change. However, this new Local Plan is not expected to be adopted until mid-2025. The current Mid Devon Local Plan has a lifespan to 2033 and remains in force as part of the statutory adopted development plan for the district together with the Devon Minerals and Waste Plans and neighbourhood plans (where these have been successful at their local referendum and 'made'). The current Local Plan includes policies for the development and use of land and buildings which are relevant to adapting to climate change and mitigating its effects. However, its content pre-dates current national planning policy, the Council's adoption of the Devon Climate Emergency Declaration in June 2019, and also more recent technical evidence intended to help inform future plan making. As a consequence, the Council took the decision in February 2021 to prepare an interim planning policy statement for the climate emergency to supplement relevant policies in the adopted Local Plan. This can also have regard to more recent national planning policy, legislation, technical information, current good practice and the Climate Emergency declaration, and will provide a stepping stone to the new Local Plan. The interim planning policy statement and use of a 'Climate Emergency – Planning Applications Checklist' is intended to raise the profile and importance, and improve the transparency of climate change and climate emergency considerations in the planning process in Mid Devon.

Status

2.3 The interim planning policy statement does not form part of the statutory plan, alter existing or set new planning policy.

2.4 It will have the status of non-statutory guidance and will also be a resource which can be used by applicants to help inform the preparation of planning applications submitted to the Council for determination within the Mid Devon area. The interim planning policy statement can help clarify how the requirements of existing development plan policies can be met in relation to climate change, which can assist the assessment of planning applications, and it underlines that tackling climate change is a material consideration.

2.5 The climate emergency is increasingly recognised as a significant material consideration in decision-making and appeals[1]. As such, in April 2021 the Secretary of State recognised that **"the scale and urgency of the climate change**

[1] APP/K1128/X/20/3252613, APP/K1128/W/20/3252623. Appeal by Mr David Holloway against South Hams District Council

emergency is such that tackling climate change is a material consideration to which significant weight should be attached".[2]

2.6 This is supported in a recent publication by the Royal Town Planning Institute (RTPI) and the Town and Country Planning Association (TCPA) which advocates that the climate impacts of any decisions that contradict planning policy are fully assessed, and that "development should not be approved if it would increase risks to the community or exceed established carbon budgets"[3].

2.7 The 'Statement' will be applicable to all applications for the development and use of land and buildings in Mid Devon (outside the Dartmoor National Park) that are submitted to the Council for determination. However, not all of its principles / objectives may be relevant in every instance and this will need to be considered on a case by case basis. Exemptions to the use of the 'Statement' will include development that is subject to 'permitted development rights' where there is no need to apply for planning permission.

Content

2.8 The interim planning policy statement includes guidance and resources in the form of three key elements:

a) A Climate Emergency - Planning Applications Checklist to be used for development proposals;

b) Guidance in the form of a Net Zero Carbon Toolkit;

c) The Council's Net Zero Housing Assessment Tool to be used to compare 'low carbon' standards for new residential development.

2.9 The interim planning policy statement will be subject to public consultation, which will include seeking feedback from the development industry, and all comments received will be carefully considered before the documents is finalised and is adopted by the Council.

[2] APP/V2255/W/19/3233606 Secretary of State decision. Appeal by Quinn Estates Ltd and Mulberry Estates (Sittingbourne) Ltd against Swale Borough Council

[3] TPCA/RTPI (2021) The Climate Crisis – a guide for planning authorities on planning for climate change https://www.tcpa.org.uk/planning-for-climate-change

3.0 Climate Emergency Context

3.1 The Council has set an ambitious target to achieve net zero by 2030, ahead of Devon County Council's commitment to realise this by 2050 and that of the sixth Carbon Budget, which sets a legally binding target for a 78% reduction by 2035 (compared with 1990 levels)[4].

3.2 The Mid Devon Climate Strategy 2020-2024[5] clearly identifies the role in that the planning system can lead in mitigating, and adapting to, climate change. To complement this, a variety of planning-related work streams are currently being implemented through the Mid Devon Climate Action Plan.

3.3 Due to the urgent need for action and the potential impact on delivery of housing and associated infrastructure, the Council is placing preparation for, and response to climate change at the forefront of its corporate agenda. This will ensure that environmental sustainability is considered alongside social and economic sustainability. This will, of necessity, require changes to existing planning policies, which will be explored during the preparation of Plan Mid Devon. The Plan will cover the period to 2043, set within a vision that looks ahead to 2053. Alongside this is a commitment to update the Council's Air Quality Supplementary Planning Document (SPD).

3.4 The planning system is set by, and subject to, a number of pieces of international, national, and local, legislation and regulation. This section identifies those currently of most relevance to this Statement and the need to plan for climate change.

Legislative Context

United Nations Sustainable Development Goals (SDGs) 2015 [6]

3.5 Formulated as part of the United Nations 2030 Agenda for Sustainable Development, the 17 UN SDGs provide an integrated framework to address a comprehensive range of issues, and are underpinned by 169 ambitious Global Targets and 244 Global Indicators. Supported by the Royal Town Planning Institute (RTPI), the SDGs provide a particular opportunity to strengthen the commitment by local planning authorities to deliver development that contributes positively to creating sustainable communities (goal 11) and adapting to climate change (goal 13). According to the UK Government, which adopted the Agenda in 2015 following involvement in its production, 65% of the Global Targets are reliant on local stakeholder involvement if they are to be achieved.

Planning and Compulsory Purchase Act 2004 [7]

3.6 Section 19 (1A) of the Planning and Compulsory Purchase Act 2004 (as amended) includes a requirement for development plan documents to include policies designed to ensure that development and land use contribute to the mitigation of, and adaption to, climate change.

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[4] http://www.theccc.org.uk/publication/sixth-carbon-budget/
[5] https://sustainablemiddevon.org.uk/Media/sefbojtr/mddc-climate-strategy-2020-2024-v1-dec2020-ac.pdf
[6] https://www.un.org/sustainabledevelopment/sustainable-development-goals/
[7] https://www.legislation.gov.uk/ukpga/2004/5/contents

Climate Change Act 2008 [8]

3.7 The 2019 amendment to the Climate Change Act 2008 contains a legally binding commitment to reduce the UK's net emissions of greenhouse gases by 100% by 2050 (relative to 1990 levels). However, in June 2021 the Government adopted the sixth carbon budget[9], which sets out a target reduction of 68% by 2030, stimulating the need for rapid action.

Environment Act 2021 [10]

3.8 Extending the duty conferred by the Natural Environment and Rural Communities Act 2006 on local planning authorities to conserve biodiversity, the Environment Act 2021 introduces a requirement to also enhance biodiversity. This comes in the form of introducing local nature recovery strategies and an expectation that all new development deliver a minimum 10% net gain in biodiversity, which should be managed for at least 30 years. To combat the ecological emergency, there is a strong expectation by the Council that new developments should be delivering biodiversity net gain in advance of the mandatory requirement coming into force (expected in the autumn of 2023). The Act also places weight on the role of nature based solutions in addressing climate change, sets out new requirements for waste reduction, air and water quality, and emphasises the sustainable use of resources.

Planning and Energy Act 2008 [11]

3.9 Section 1 of the Planning and Energy Act 2008 (as amended) empowers local planning authorities to include policies imposing reasonable requirements for a proportion of energy used in development within their area to be low carbon, or derived from renewable sources in the locality of the development, and to set "energy efficiency standards that exceed the energy requirements of building regulations".

National and Local Policy Context

National Planning Policy Framework 2021 [12]

3.10 The adopted Local Plan was prepared in the context of the 2012 National Planning Policy Framework (NPPF) and examined under transitional arrangements. Since then, the NPPF has undergone two revisions, the current 2021 version placing a greater emphasis on addressing the climate challenge as a material consideration and including reference to the UN SDGs.

3.11 The NPPF 2021 sets out the Government's planning policies for England and how these should be applied in relation to both plan-making and decision-making. Key sections relating to planning for climate resilience are summarised below:

- Paragraph 8 identifies the opportunity to secure net gain across interdependent economic, social, and environmental objectives. It also includes a commitment to 'mitigating and adapting to climate change, including moving to a low carbon economy'.

[8] https://www.legislation.gov.uk/ukpga/2008/27/contents
[9] The Carbon Budget Order 2021 (SI 2021/750)
[10] https://www.legislation.gov.uk/ukpga/2021/30/contents/enacted
[11] https://www.legislation.gov.uk/ukpga/2008/21/contents
[12] https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/1005759/NPPF_July_2021.pdf

- Paragraph 104 states that 'transport issues should be considered at the earliest stages of plan-making and development proposals, so that … opportunities to promote walking, cycling and public transport are identified and pursued'.
- Paragraph 105 supports Paragraph 104, setting out that 'significant development should be focused on locations which are or can be made sustainable, through limiting the need to travel and offering a genuine choice of transport modes'.
- Paragraph 131 stipulates that existing trees are retained wherever possible, new streets are tree-lined, opportunities are sought to incorporate trees into developments and that long-term maintenance of newly-planted trees is secured.
- Paragraph 152 includes a requirement for the planning system to 'support the transition to a low carbon future' through 'shap[ing] places in ways that contribute to radical reductions in greenhouse gas emissions, minimise vulnerability and improve resilience'.
- Paragraph 153 states that plans should consider 'the long-term implications for flood risk … water supply, biodiversity and landscapes, and the risk of overheating from rising temperatures' on the future resilience of infrastructure and communities, establishing a clear link with the objectives and provisions of the Climate Change Act 2008.
- Paragraph 167 strengthens the requirement for development within areas at risk of flooding to demonstrate that sustainable drainage systems will be incorporated, unless clear evidence can be provided to show that this would be inappropriate.
- Chapter 15 specifically references the securing measurable net gains for biodiversity within paragraphs 179 and 180. While paragraphs 174 and 179 promote the establishment, conservation, restoration and enhancement of ecological networks.

National Planning Practice Guidance [13]

3.12 The NPPF is supported by national Planning Practice Guidance (PPG) which provides additional context and guidance on how the NPFF and other relevant statements should be interpreted. The PPG is subject to regular updating, therefore specific paragraphs are not referred to within this Statement.

The Building Regulations 2021 Amendments [14]

3.13 In anticipation of a Future Homes and Buildings Standard, the 2021 amendments to the Building Regulations came into force on 15th June 2022, followed by a 1-year transition period to allow for work subject to an existing building notice and for planning applications currently underway.[15]

3.14 The changes include the following interim uplifts to Part L 'Conservation of fuel and power', Part S 'Infrastructure for charging electric vehicles', and the introduction of Part O 'Overheating in new residential buildings'.

- Part L strongly encourages developers to **aspire towards zero carbon**, setting out that all new homes should provide an uplift in thermal efficiency (against 2013 Building Regulations) of at least 30%, with a minimum 40% of the building footprint accommodating roof mounted solar photovoltaic panels. For non-residential buildings, a 31% reduction of baseline emissions is required.

[13] https://www.gov.uk/government/collections/planning-practice-guidance
[14] https://www.legislation.gov.uk/uksi/2010/2214/contents/made
[15] Circular Letter 02/2021, https://www.gov.uk/government/collections/building-regulations-circulars

- Part O seeks to ensure that new homes are designed to **reduce overheating** through minimising solar gain and removing excess heat. This is to be achieved through restricting the amount of glazing allowed in a single room, in combination with consideration of cross-ventilation and orientation.
- Part S requires that where car parking provision is made, all new residential development must have a **minimum of one electric vehicle charging point per dwelling**, irrespective of whether communal or private parking spaces are provided.

National Design Guide 2019 and National Model Design Code 2021 [16]

3.15 The National Design Guide sets out the ten characteristics of a well-designed place that need to positively address environmental issues affecting climate. The National Model Design Code reflects this through a requirement for codes to cover sustainability, which includes nature based solutions, energy efficiency, net zero alignment and climate resilience.

UK Climate Change Risk Assessment 2022 [17]

3.16 Published in January 2022, the UK Government's third Climate Change Risk Assessment identifies 8 priority risk areas. With an onus on achieving net zero (mitigation) and climate resilience (adaptation), these include risks to:

- terrestrial and freshwater biodiversity;
- soil health from increased flooding and drought;
- nature-based carbon sequestration and storage;
- supply chains and distribution networks;
- energy system failures; and
- overheating of buildings.

3.17 There is an emphasis on avoiding 'locking in' the need for future remedial actions in relation to new housing or infrastructure.

Net Zero Strategy: Build Back Greener 2021 [18]

3.18 The Government's Net Zero Strategy contains a raft of commitments. These include increasing onshore wind, solar and other renewable energies; banning the sale of petrol and diesel cars from 2030, and for all cars to fully zero emission capable by 2035. Funding to enable half of all journeys within urban areas to be walked or cycled by 2030; and to create integrated, zero emission public transport fleets and infrastructure is also pledged.

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16 https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/1009793/NMDC_Part_1_The_Coding_Process.pdf

17 https://www.gov.uk/government/publications/uk-climate-change-risk-assessment-2022

18 https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/1033990/net-zero-strategy-beis.pdf

Heat and Buildings Strategy 2021 [19]

3.19 Taking a whole lifecycle system, fabric first approach to decarbonising buildings, the Heat and Buildings Strategy sets out the Government's plan to decarbonise the UK's 30 million homes and workplaces. Key elements include a commitment to update the Building Regulations (which were enacted in June 2022), outlaw the installation of new and replacement gas boilers by 2035, and advocate installation of heat pumps and heat networks.

Written Ministerial Statement (HCWS258) on Improving Water Quality and Tackling Nutrient Pollution July 2022 [20]

3.20 In March 2022, Natural England advised the Council[21] that any "additional residential and commercial development that will result in a net increase in population served by a wastewater system, including new homes, student and tourist accommodation" within the catchment area of the Somerset Levels and Moors Ramsar will require an appropriate assessment[22]. This is to determine the potential impact on water quality from increased phosphorus levels from new development, which can lead to nutrient enrichment creating unfavourable conditions for habitats sites with subsequent loss of biodiversity. Threats such as this are interlinked and possibly cumulative in effect alongside the risks to ecological systems from climate change. A Written Ministerial Statement published in July 2022, announced details of a forthcoming nutrient mitigation scheme, to be delivered by Natural England.

Devon Minerals Plan 2011 – 2033 [23]

3.21 Adopted in February 2017, the Devon Minerals Plan provides a policy framework to maintain the supply of minerals from local reserves, through safeguarding sites and encouraging re-use of construction materials.

Future National and Local Policy Context

3.22 Mid Devon's new Local Plan - Plan Mid Devon – will introduce new policy, and the proposed structure sets the climate crisis as an overarching priority. Future policies will be subject to the reasonable expectation that they are robust and 'fit for purpose' with due regard to being capable of delivering statutory obligations and contributing to the achievement of legally binding targets, in the local context. Assessments of the likely capacity of planning policy and targets in relation to – for example – achieving Net Zero homes can be undertaken – as has been the case for the Cornwall Climate Emergency Development Plan Document[24].

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[19] https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/1036227/E02666137_CP_388_Heat_and_Buildings_Elay.pdf

[20] https://questions-statements.parliament.uk/written-statements/detail/2022-07-20/hcws258

[21] DfLUHC (16 March 2022) Nutrient Pollution: Neutrality, Support and Funding https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/1061531/Chief_Planner_Letter_about_nutrient_pollution___March_2022.pdf

[22] https://www.legislation.gov.uk/uksi/2017/1012/regulation/63

[23] https://www.devon.gov.uk/planning/planning-policies/minerals-and-waste-policy/devon-minerals-plan/

[24] Etude (2021). *Technical Evidence Base for Policy SEC 1 – New Housing*. https://bit.ly/3C5xDH9

Future Homes and Buildings Standard [25]

3.23 Following on from the 2006 Code for Sustainable Homes, the Future Homes and Buildings Standard will comprise of a set of standards to complement the Building Regulations. It will aid in reducing carbon emissions from new homes constructed from 2025 by 75-80% (based on those delivered under the 2013 requirements of Part L of the Building Regulations). Scheduled to come into force in 2025, it will also address carbon reductions in new non-domestic buildings and existing homes.

Levelling Up Bill 2022 [26]

3.24 During May the Government published the Levelling Up Bill which aims to set out how opportunity will be spread more equally across the UK through support of the decarbonisation agenda and recognition that changes to the planning system are required in order to support the transition to net zero. As part of this, the introduction of an additional clause to neighbourhood development plans is proposed for the Planning and Compulsory Purchase Act. This would require that neighbourhood development plans must be designed to ensure that development and land use within the neighbourhood forum area contributes to the mitigation of, and adaptation to, climate change.

Local Electricity Bill 2021 [27]

3.25 The Council has recently carried a motion to support the Local Electricity Bill 2021. Should this bill become law, it will enable producers of local generated renewable energy to become local electricity suppliers. The benefits include simplifying licensing conditions and ensuring that application costs are proportionate to the size of an applicant's business. In theory, this could incentivise local entrepreneurs, stimulate local economies and supply communities with clean energy.

Devon Carbon Plan [28]

3.26 Based on detailed assessments of the county's greenhouse gas emissions, the Devon Carbon Plan seeks to outline how net zero emissions will be achieved throughout Devon by 2050. Key areas to target are food production; renewable energy supply; reduced energy consumption; sustainable travel; the built environment; carbon capture and storage; and circular economy principles.

[25] https://www.gov.uk/government/consultations/the-future-buildings-standard
[26] https://bills.parliament.uk/bills/3155
[27] https://bills.parliament.uk/bills/3039
[28] https://www.devonclimateemergency.org.uk/interimcarbonplan/?cat_id=2572

4.0 Climate Emergency – Planning Applications Checklist

Validation Checklist

4.1 The Council's current Validation Checklist for planning applications submitted for determination requests the following information which is relevant in the consideration of matters relating to climate change:

All types of development

- Flood Risk Assessment
- Surface Water Drainage Strategy
- Tree survey and report
- Pollution Impact Assessment and Mitigation Scheme
- Transport Assessment / Travel Plan / Traffic Pollution Assessment / Low Emission Assessment (where significant levels of vehicle movement are likely)
- Environmental Statement (where an Environmental Impact Assessment is required)

Major development only

The National Planning Policy Framework defines 'major development': *"For housing,* [as] *development where 10 or more homes will be provided, or the site has an area of 0.5 hectares or more. For non-residential development it means additional floorspace of 1,000m2 or more, or a site of 1 hectare or more, or as otherwise provided in the Town and Country Planning (Development Management Procedure) (England) Order 2015."*

Planning proposals for major development require:

- Carbon Reduction Statement setting out how landform, layout, building orientation, massing and landscaping have been considered in relation to minimising energy consumption
- Waste Audit Statement setting out anticipated wastes arising from the construction and operational stages of the development. Focus should be on reuse, recycling, including careful selection of materials and – where possible – how existing features such as buildings, hard surfacing and topography will be incorporated

4.2 It is intended the Validation Checklist will be updated. This will provide an opportunity to include greater emphasis on climate change and climate emergency matters, and can assist the Council in meeting its target of reducing carbon emissions to net zero by 2030.

Climate Emergency – Planning Applications Checklist

4.3 This Non-Statutory Interim Planning Policy Statement introduces a 'Climate Emergency – Planning Applications Checklist', which will be used by the Council for the purpose of helping to inform pre-application discussions, and also in the consideration of planning applications that have been submitted for determination. The Climate Emergency – Planning Applications Checklist includes principles and objectives derived through a scoping of policies relevant to climate change in the

adopted Mid Devon Local Plan, and has expanded these as guidance in the form of measures for consideration.

4.4 The Interim Planning Policy Statement will be relevant to proposals for the development and use of land and buildings in Mid Devon in relation to climate change considerations. **Applicants for planning permission will be expected to have regard to the principles and objectives contained in this Interim Planning Policy Statement and show how these have been considered and used in preparing planning applications, and these principles and objectives will be used by the Council, alongside relevant development plan policies and policies of the National Planning Policy Framework to assist the consideration of planning applications that are submitted for determination.**

4.5 The Climate Emergency – Planning Applications Checklist [will be / is] available as a separate document under the Planning section of the Council's website. Appendix A provides tables demonstrating how current legislation, regulation and policy support the checklist.

Climate Emergency - Planning Applications Checklist

Principle	Objectives	Measures for consideration in relation to relevant policy and legislative requirements	Has this been addressed through the planning proposal?	
			If yes, please outline how	If not, please explain why
CP.1 Sustainable development	CP.1.1 Benchmarking and quality	Participation on a recognised environmental accreditation scheme, such as LEED, BREEAM, or Building for Nature or through application of the Net Zero Carbon Toolkit		
CP.2 Increasing accessibility, reducing the need to travel, and efficient movement of goods	CP.2.1 Density and adaptability	Optimise (achieve a significant uplift) in densities of dwellings in town centres and other locations which are well served by public transport		
		Building design to allow for future adaptation, including for new technologies and battery storage		
		Other (please state):		
	CP.2.2 Permeability and walkability	Active frontages/edges with opportunities for natural surveillance		
		Use of sensory features and opportunities to stand and stay, places to sit and stand utilising views and sun		
		Pedestrian friendly – no obstacles, good surface, access for all, crossings, good sightlines, appropriate lighting, interesting facades		
		Signposting to local facilities		
		Appropriate block sizes to location		
		Local facilities accessible through walking/cycling (within 800m of new developments)		

Principle	Objectives	Measures for consideration in relation to relevant policy and legislative requirements	Has this been addressed through the planning proposal?	
			If yes, please outline how	If not, please explain why
		Maximising the number of internal pedestrian routes through the site		
		Maximising the number of pedestrian external routes in and out of the site linking to the wider area		
		Other (please state):		
	CP.2.3 Integrated active travel	Accessible range of transport modes with overall low impact on the environment		
		Signposting of active travel routes and facilities		
		Provision of travel packs for new residents		
		Easy transition from cycling and walking to public transport		
		Well lit travel facilities and appropriate crossings for pedestrians and cyclists		
		Other (please state):		
	CP.2.4 Cycling	Secure changing facilities provided in non-residential developments		
		Covered, well-located and secure cycle storage facilities		
		Green corridors, off-road cycle routes and public rights of way		
		Direct links for cyclists		
		Cycle routes linking to wider area		

Principle	Objectives	Measures for consideration in relation to relevant policy and legislative requirements	Has this been addressed through the planning proposal?	
			If yes, please outline how	If not, please explain why
		Segregated cycle lanes		
		Other (please state):		
	CP.2.5 Planning for the car	Car-free, limited and timed zones at certain times and/or locations		
		<u>Residential development</u> Inclusion of a minimum of 1 electric vehicle charging point per dwelling (statutory requirement through Part S of the Building Regulations) <u>Non-residential development</u> Provision of electric vehicle charging points as set out for non-residential uses in Policy DM5		
		Car clubs or demand responsive transport		
		Co-ordinated traffic calming approaches		
		Other (please state):		
	CP.2.6 Freight and logistics	Allow for the efficient delivery of goods (e.g. freight consolidation opportunities, mobility hubs, loading bays to accommodate deliveries without blocking roads/causing congestion)		
		Other (please state):		
CP.3 Improving energy efficiency	CP.3.1 Minimising energy consumption	<u>Residential development</u> Please refer to CP.3.2 below		

Principle	Objectives	Measures for consideration in relation to relevant policy and legislative requirements	Has this been addressed through the planning proposal?	
			If yes, please outline how	If not, please explain why
		Use of on-site or locally sourced reclaimed materials, and incorporation of existing structures into new development		
		Opportunities for repurposed buildings and structures prioritised over new construction		
		Soft-edges to footpaths and cycle-paths		
		Plot and block orientation, and position windows to optimise solar gain		
		Natural ventilation and easy to regulate ventilation (air tight when needed)		
		Use of vegetation for shade in summer		
		Private outdoor space for food growing and composting (agricultural land classification required)		
		Community food growing opportunities, such as allotments, orchards and foraging (agricultural land classification required)		
		Other (please state):		
	CP.3.2 Using energy more efficiently	<u>Residential development</u> Provision of key details of the energy efficiency and carbon standards for the proposed design	Net Zero Carbon Toolkit	

Principle	Objectives	Measures for consideration in relation to relevant policy and legislative requirements	Has this been addressed through the planning proposal?	
			If yes, please outline how	**If not, please explain why**
		through the use of the Net Zero Carbon Toolkit and the Net Zero Housing Assessment Tool. **The MDDC Net Zero Housing Assessment Tool should be used as the preferred method of presenting a summary of the following information. The completed tool should be submitted as part of a Carbon Reduction Statement.** 1. Operational Standards: a. The applicable Building Regulations minimum standard (such as Part L, Future Homes and Buildings Standard) b. The minimum Fabric Standard (performance standard), measured in kWh/m^2/year. (kilo-Watt-hours per square metre per year) c. The Carbon Standard (such as Net Zero, or a % improvement on the Part L in force) 2. A target Embodied Carbon standard: tCO_2e/m_2 benchmark (tonnes of CO_2 equivalent per square metre) 3. Calculate the Embodied, Operational Lifetime, and Total Lifetime tCO_2e (tonnes of CO_2 equivalent)		
			Net Zero Housing Assessment Tool	

Principle	Objectives	Measures for consideration in relation to relevant policy and legislative requirements	Has this been addressed through the planning proposal?	
			If yes, please outline how	If not, please explain why
		<u>Non-residential development</u> Provision of key details of the energy efficiency and carbon standards for the proposed design. 1. Operational Standards: a. The applicable Building Regulations minimum standard (such as Part L, Future Homes and Buildings Standard) b. The minimum Fabric Standard (performance standard), measured in kWh/m^2/year. (kilo-Watt-hours per square metre per year) c. The Carbon Standard (such as Net Zero, or a % improvement on the Part L in force) 2. A target Embodied Carbon standard: tCO_2e/m^2 benchmark (tonnes of CO_2 equivalent per square metre) 3. Calculate the Embodied, Operational Lifetime, and Total Lifetime tCO_2e (tonnes of CO_2 equivalent)		
		External/internal lighting management systems with low carbon or energy efficiency technology e.g. solar		
		A higher level of fabric standards/insulation than required by the Building Regulations		

Principle	Objectives	Measures for consideration in relation to relevant policy and legislative requirements	Has this been addressed through the planning proposal?	
			If yes, please outline how	If not, please explain why
		Low carbon road surface options which are unlikely to be adopted by Devon County Council, e.g. • Primary and secondary roads: low temperature asphalt • Tertiary roads: permeable paving		
		Other (please state):		
	CP.3.3 Using cleaner energy	Renewable energy generation and supply, including on-site where feasible		
		Infrastructure to connect renewable energy systems to the grid (distribution network operator may need to assess)		
		Battery storage or flexibility systems such as V2G (vehicle to grid)		
		Other (please state):		
CP.4 Adapting to higher temperatures	CP.4.1 Shade and ventilation	Application of a cooling hierarchy to moderate the indoor climate through passive measures		
		Other (please state):		
	CP.4.2 Use of cool materials	Use of materials that minimise heat gain in summer e.g. cool roofs and paving		
		Other (please state):		
	CP.4.3 Green infrastructure	Beneficial habitat features e.g. trees in landscaping, parking areas and open spaces		

Principle	Objectives	Measures for consideration in relation to relevant policy and legislative requirements	Has this been addressed through the planning proposal?	
			If yes, please outline how	If not, please explain why
		Relationship between vegetation and building to optimise natural ventilation		
		Green and blue infrastructure in private outdoor space, e.g. trees, hedgerows, hedges, green/brown/blue roofs, vertical climbers, water features and landscaping		
		Other (please state):		
CP.5 Mitigating flood risk, and water resource resilience	CP.5.1 Sustainable urban drainage systems (SuDS)	SuDS such as rain gardens, swales, natural water courses, communal soakaways, filter strips, retention and detention basins		
		Other (please state):		
	CP.5.2 Water efficiency and rainwater harvesting (ways to reduce demand on water utilities)	Water efficiency designed into specifications, e.g. toilet flush systems, shower and tap flow rates.		
		Coordinated greywater recycling and reuse systems		
		Rainwater collection and reuse systems		
		Other (please state):		
		Permeable surfaces for roads, parking areas, hard surfacing and pavements		

Principle	Objectives	Measures for consideration in relation to relevant policy and legislative requirements	Has this been addressed through the planning proposal?	
			If yes, please outline how	If not, please explain why
	CP.5.3 Reducing the risk of flooding	Nature-based solutions, natural vegetation of habitats, e.g. green/brown/blue roofs, communal basins and ponds, green spaces within blocks, and green verges		
		Undertake a Flood Risk Assessment (FRA) if the site is within: • Flood Zone 1: for locations within a critical drainage area, or potentially affected by flooding from surface water, reservoirs, etc., or where the site is larger than 1 hectare (ha) • Flood Zones 2 and 3 Use the latest climate change allowances, pertinent to the lifetime of the development		
		Other (please state):		

Principle	Objectives	Measures for consideration in relation to relevant policy and legislative requirements	Has this been addressed through the planning proposal?	
			If yes, please outline how	If not, please explain why
CP.6 Resilience of natural systems and resources	CP.6.1 Protecting existing Natural Capital and biodiversity	For development within the Somerset Levels and Moors Ramsar catchment area (phosphorus nutrient neutrality): 1. Does the development generate wastewater from overnight use? 2. Is wastewater likely to be discharged into the catchment 3. Is there a change to the land use or drainage area? 4. Does any part of the existing land use drain into the catchment area? 5. Does the development result in a net increase in nutrients to the catchment?		
		Avoidance and mitigation measures for other pollution of landscapes, soils, ecosystems and water – such as nitrates, transport, agricultural or industrial emissions		
		Light pollution avoidance, design and mitigation hierarchy, limit impacts of lighting. Conservation and enhancement of dark zones to benefit nature e.g. bats and other sensitive species.		
		Retention of existing open water features		
		Retention of existing habitat features such as trees, scrub, hedgerows, refugia, hibernacula.		

Principle	Objectives	Measures for consideration in relation to relevant policy and legislative requirements	Has this been addressed through the planning proposal?	
			If yes, please outline how	If not, please explain why
		Protection of existing trees, hedges and hedgerows during site preparation, demolition and/or construction works (for ecological value, carbon sequestration and amenity value)		
		Other (please state):		
	CP.6.2 Creating and enhancing biodiversity	Ecological impact assessment, mitigation and enhancements. 1. Has an ecological baseline been established? (e.g. preliminary ecological appraisal) 2. Has an Ecological Impact Assessment been recommended or undertaken? 3. Has a mitigation hierarchy been followed? 4. What enhancements have been proposed? 5. Have climate change implications been considered in ecological assessments and management plans? Biodiversity Net Gain (BNG): 1. Which BNG Biodiversity Metric was used to assess proposals and calculate net gain? 2. Have you submitted the completed metric spreadsheet? (evidence of calculation) 3. How will a statutory minimum 10% net gain be delivered, either on-site or off-site? 4. How will management of the site be secured for a minimum of 30 years?		

Principle	Objectives	Measures for consideration in relation to relevant policy and legislative requirements	Has this been addressed through the planning proposal?	
			If yes, please outline how	If not, please explain why
		5. How will this be monitored and reported? Reference: Devon Planning Guidance for Biodiversity Compensation and Net Gain https://www.devon.gov.uk/environment/wildlife/wildlife-and-geology-planning-guidance		
		Restoration or new planting of hedges, hedgerows and trees (for habitat value and carbon sequestration, ecological and amenity value)		
		Planting of native or non-intrusive species for pollinators and other insects		
		Installation of green infrastructure such as green/brown/blue roofs and green/vegetated walls (including climbing and trailing plants)		
		Inclusion of one or more: bird boxes, bat boxes/bricks, amphibian kerbs, hibernacula, hedgehog holes/highways, wildlife-friendly/accessible ponds or other water features		
		Other (please state):		
		Proximity to nature recovery areas and networks		

Principle	Objectives	Measures for consideration in relation to relevant policy and legislative requirements	Has this been addressed through the planning proposal?	
			If yes, please outline how	If not, please explain why
	CP.6.3 Nature recovery and wildlife networks	Creation of connective habitat features e.g. hedges, ditches, tree lines for wildlife to commute and migrate		
		Trees incorporated into primary street frontages (for habitat value, carbon sequestration and vehicle emissions filtration, ecological and amenity value)		
		Creation of pocket parks		
		Wildlife nodes at junctions and street corners		
		Green/blue buffers adjacent to wildlife areas		
		Other (please state):		

5.0 Net Zero Carbon Toolkit

5.1 The Local Government Association (LGA) Housing Advisers Programme, has been designed to support councils seeking to innovate in meeting the housing needs of their communities. The Programme has funded the development of a Net Zero Carbon Toolkit. This contains the latest design approach and good practice within the field of Net Zero buildings, and has been developed by leading technical experts from Etude, the Passivhaus Trust, Levitt Bernstein and Elementa Consulting.

5.2 The Net Zero Carbon Toolkit is introduced as part of this Non-Statutory Interim Planning Policy Statement. It explains how net zero carbon developments can be delivered through construction, and takes into account embodied carbon and operational energy requirements. The Net Zero Carbon Toolkit includes advice on different methods of design and construction to achieve and maintain a healthy and comfortable indoor climate. It can also be applicable to the retrofitting of existing homes and where work does not require planning permission.

5.3 The Net Zero Carbon Toolkit [will be / is] available as a separate document under the Planning section of the Council's website and can be used alongside the Net Zero Housing Assessment Tool. Applicants for the development of new homes will be expected to make use of the Net Zero Carbon Toolkit in the preparation of planning proposals. In doing so, this can help show how the following principles and objectives of the Climate Emergency – Planning Applications Checklist, where relevant to new build homes, can be met:

- Principle CP.1 Sustainable development
    - Objective CP.1.1 Benchmarking and quality
- Principle CP.2 Increasing accessibility, reducing the need to travel, and efficient movement of goods
    - Objective CP.2.1 Density and adaptability
- Principle CP.3 Improving energy efficiency
    - Objective CP.3.1 Minimising energy consumption
    - Objective CP.3.2 Using energy more efficiently
    - Objective CP.3.3 Using cleaner energy

6.0 Net Zero Housing Assessment Tool

6.1 Mid Devon District Council has developed a “Net Zero Housing Assessment Tool” with the University of Exeter. This can be used alongside the Net Zero Carbon Toolkit to evaluate the costs and benefits of various ‘low carbon’ standards for new housing developments.

6.2 The Net Zero Housing Assessment Tool is prepared for use in a spreadsheet format. It is intended to enable a greater understanding of how sustainable design and low carbon technologies can be implemented within developments, and will also help the Council and applicants for planning permission better understand the carbon emissions arising from proposals. It provides the ability to test different approaches and to evaluate the effect of these in terms of both reducing carbon emissions and the resultant cost uplift, which can be factored into more detailed development appraisals.

6.3 The Net Zero Housing Assessment Tool calculates carbon performance (based on regulated emissions from Part L of the Building Regulation, and embodied carbon) of 4 dwelling typologies: detached, attached, 1-bed flats and 2-bed flats for a range of fabric and building services specifications. The tool then sizes the required PV array to meet Part L, and any further improvements. The next stage establishes the cost uplift to achieve user-selected performance standards, compared to the lowest cost means to meet the minimum requirements of the 2021 Building Regulations amendments.

6.4 The Net Zero Housing Assessment Tool [will be / is] available as a separate document under the Planning section of the Council’s website. Applicants for the development of new homes are encouraged to make use of the Net Zero Housing Assessment Tool in the preparation of planning proposals. In doing so, this can help show how the following principles and objectives of the Climate Emergency – Planning Applications Checklist, where relevant to new build homes, can be met:

- Principle CP.3 Improving energy efficiency
    - Objective CP.3.1 Minimising energy consumption
    - Objective CP.3.2 Using energy more efficiently

Appendix A Legislative, Regulatory and Policy Context

National Requirements	**Corresponding Objective**
Environment Act 2021	CP.6.1; CP.6.2; CP.6.3
UK Climate Change Risk Assessment 2022	CP.4.1; CP.4.2; CP.4.3; CP.5.1; CP.5.2; CP.5.3; CP6.1; CP.6.2; CP.6.3
NPPF 2021	CP.2.1; CP.2.2; CP.2.3; CP.2.4; CP.3.1; CP.3.2; CP.3.3; CP.4.1; CP.4.2; CP.4.3; CP.5.1; CP.5.2; CP.5.3; CP6.1; CP.6.2; CP.6.3
Part L 'Conservation of fuel and power' of The Building Regulations etc. (Amendment) (England) Regulations 2021	CP.2.1; CP.3.2
Part O 'Overheating in new residential buildings' of The Building Regulations etc. (Amendment) (England) Regulations 2021	CP.4.1; CP.4.3
Part S Infrastructure for charging electric vehicles' of The Building Regulations etc. (Amendment) (England) Regulations 2021	CP.2.5
Written Ministerial Statement (HCWS258) on Improving Water Quality and Tackling Nutrient Pollution July 2022	CP.6.1
Net Zero Strategy: Build Back Greener 2021	CP.2.2; CP.2.3; CP.2.4; CP.2.5; CP.3.2; CP.3.3; CP.6.1; CP.6.2; CP.6.3
Heat and Buildings Strategy 2021	CP.2.1; CP.3.2; CP.3.3
National Design Guide 2019 / National Model Design Code 2021	CP.2.1; CP.2.2; CP.2.3; CP.2.4; CP.2.5; CP.3.1; CP.3.2; CP.3.3; CP.4.1; CP.4.2; CP.4.3; CP.5.1; CP.5.2; CP.5.3; CP.6.1; CP.6.2; CP.6.3

County Requirements	**Corresponding Objective**
Devon Minerals Plan 2011 - 2033	CP.3.1

Mid Devon Local Plan 2013 – 2033 Policy	**Corresponding Objective**
Policy S1 Sustainable development priorities	CP.2.1; CP.2.2; CP.2.3; CP.2.4; CP.2.5; CP.4.3; CP.5.3; CP.6.2; CP.6.3
Policy S8 Infrastructure	CP.2.1; CP.2.2; CP.2.3; CP.2.4; CP.2.5
Policy S9 Environment	CP.3.2; CP.4.2; CP.4.3; CP.5.1; CP.5.2; CP.5.3; CP.6.1; CP.6.2; CP.6.3
Policy S14 Countryside	CP.6.2
Policy DM1 High quality design	CP.2.1; CP.2.2; CP.2.3; CP.2.4; CP.2.5; CP.3.1; CP.5.1; CP.5.3; CP.6.3
Policy DM2 Renewable and low carbon energy	CP.6.2

Mid Devon Local Plan 2013 – 2033 Policy	Corresponding Objective
Policy DM5 Parking	CP.2.5
Policy DM9 Conversion of rural buildings	CP.3.1
Policy DM20 Agricultural development	CP.5.3; CP.6.1
Policy DM27 Protected landscapes	CP.6.2; CP.6.3

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Mid Devon
DISTRICT COUNCIL

September 2022 v1.0

Net Zero Carbon Toolkit

Etude ELEMENTA Passivhaus Trust Levitt Bernstein People.Design

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Please attribute: Levitt Bernstein, Elementa, Passivhaus Trust and Etude commissioned by West Oxfordshire, Cotswold and Forest of Dean District Councils, funded by the LGA Housing Advisers Programme.

Contents

Introduction

This chapter sets out why this toolkit has been produced and how it can be used.

It also defines Net Zero carbon buildings and puts them in the context of the wider electricity revolution.

Foreword

Mid Devon District Council declared a Climate Emergency in 2019 with the ambition to enable Net Zero by 2030, ahead of the wider Devon Carbon Plan target.

Achieving the UK's legally-binding Net Zero target is no small task, nor is it one that any single person or organisation can achieve alone. It requires everyone to come together, to work collectively, to share in their experiences and to build on their successes along the way. Through shared progress we can rapidly raise the standards for all new housing and in the retrofit of existing homes.

This Net Zero Carbon Toolkit is a practical and easy-to-navigate guide on how to plan your Net Zero housing project.

Whether you are a small or medium-size house builder, an architect, a self-builder or a consultant advising clients, this Toolkit will help you. With local planning policy expected to strengthen requirements for Net Zero in development terms, this Toolkit explains how this can be delivered through design, construction and operational systems.

Leading technical experts from Etude, the Passivhaus Trust, Levitt Bernstein and Elementa Consulting have produced a resource that contains the very latest design approach and good practice within the field of Net Zero buildings. This Toolkit is the output of funding from the Local Government Association (LGA) Housing Advisers Programme designed to support councils seeking to innovate in meeting the housing needs of their communities.

We hope you find technical value, as well as inspiration and motivation, to achieve the best housing design possible.

Go to section…

Introduction

The Intergovernmental Panel on Climate Change (IPCC, www.ipcc.ch), in 2018, showed the world there would be only 12 years to prevent irreversible catastrophic damage from a changing climate.

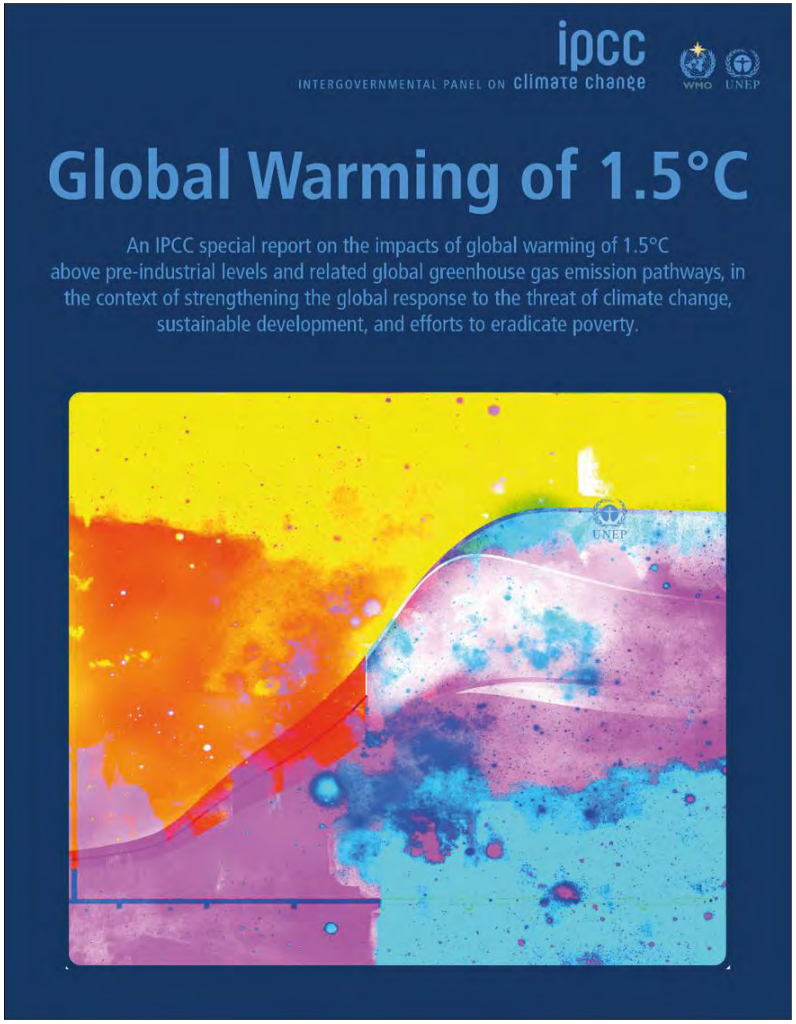
Any temperature increase above 1.5°C would trigger far worse effects than previously thought, in terms of drought, flood, poverty for many people, and catastrophic biodiversity loss.

The Climate Change Committee (the CCC, theccc.org.uk) provides independent advice to the UK government and has published reports on the need for action to address the climate crisis.

Mid Devon District Council, along with other local planning authorities across the country, declared a climate emergency to deliver local action in response to a global issue. There is a significant role to play in ensuring new housing and retrofits adopt and achieve the highest possible standards of energy efficiency, low carbon and Net Zero building design.

The Net-Zero Toolkit is designed to assist in the planning, design and construction of a new build or retrofit housing project.

It provides a technical, go-to guide on what to consider in the very early stages of design; how to achieve fabric energy efficiency; what systems to include; where to go for expert advice; and what to consider once you have finished your housing project and you are handing over to occupants.



(Source: IPCC)

This Net Zero Carbon Toolkit

Who is it for?

This toolkit has been created to make Net Zero carbon new build and retrofit more accessible. It has been created for building professionals (developers, contractors, architects and engineers) and is also relevant to self-builders, planning officers and other housing professionals. Although it can be used by homeowners, it is aimed at those who already have some knowledge or experience of construction.

Both new homes and retrofit

The toolkit tackles new build homes and the retrofit of existing homes in separate chapters. So whatever your project, you will find relevant information here.

Small to medium scale housing

The primary focus is on small to medium scale housing projects, but the principles are generally applicable to projects of any scale.

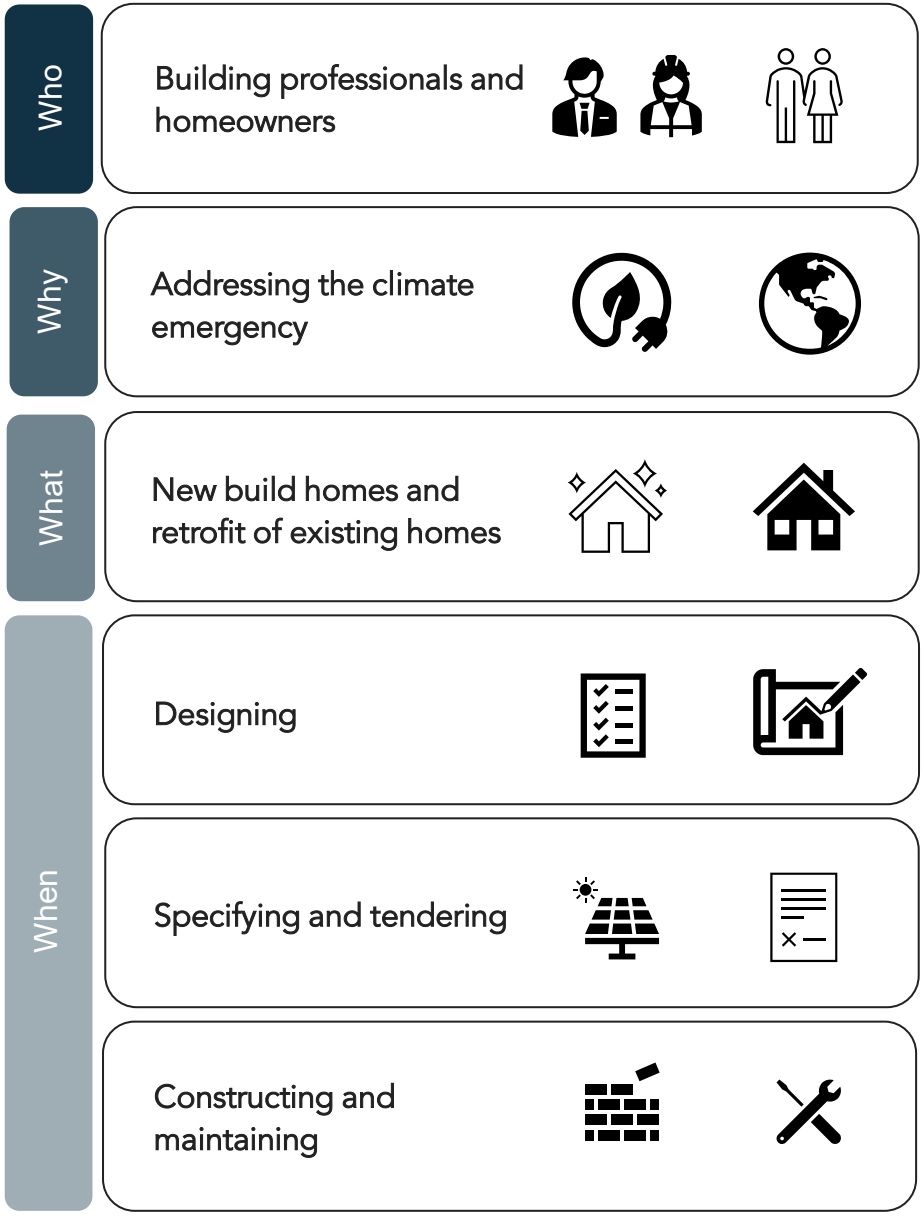
From site selection to construction to operation

It covers all stages of building design and construction, including maintenance and operation.

Understanding the complete picture

The toolkit aims to build the awareness and confidence of people implementing low or zero carbon projects and generally seeks to answer the following questions:

- Why?
- What to do and how to bring it all together?
- What does "good" look like?
- What to specify and how to choose products?



Core principles of Net Zero carbon buildings

Net Zero carbon buildings in operation are supported by three core principles: energy efficiency, low carbon heat and renewable energy.

Energy efficiency

Buildings use energy for heating, hot water, ventilation, lighting, cooking and appliances. The efficient use of energy reduces running costs and carbon emissions. It also reduces a building's impact on the wider energy supply network, which is also an important consideration.

There are different metrics we use to measure the efficiency of a building, including Space Heating Demand and Energy Use Intensity (both measured in kWh/m^2/yr). These are described on the next page.

Low carbon heating

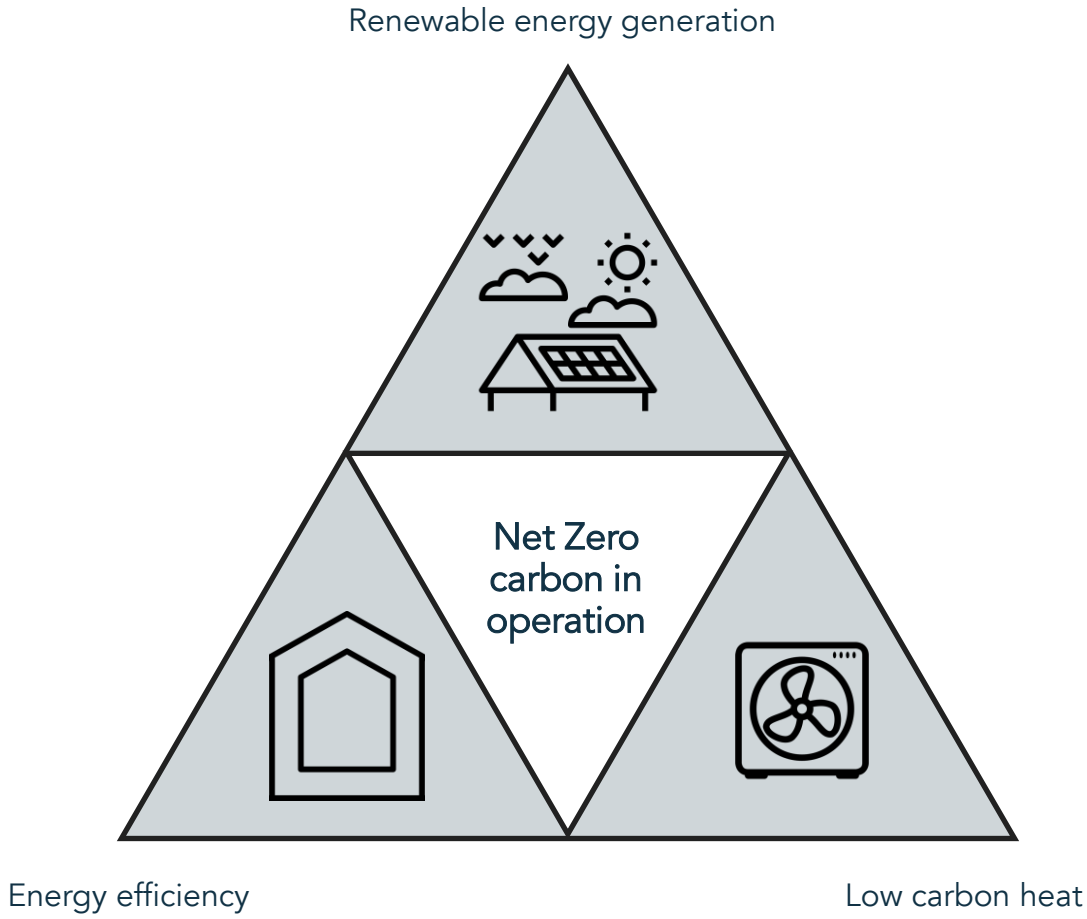
Low carbon sources of heat are an essential feature of Net Zero carbon buildings. All new buildings should be built with a low carbon heating system and must not connect to the gas network. Existing buildings need to transition away from gas and oil now.

Renewable energy generation

In new buildings, renewable energy generation should be at least equal to the energy use of the building on an annual basis for it to qualify as Net Zero carbon in operation. This is straightforward to achieve on site for most new homes through the use of solar photovoltaic (PV) panels. The roofs of existing homes should also be utilised for PV panels, to support the increased demand for renewable energy.

Embodied carbon

Operational carbon is only part of the story. Net Zero buildings should also minimise embodied carbon in materials.



The three pillars of a Net Zero carbon building in operation

Go to section…

Introduction to energy targets and Key Performance Indicators (KPIs)

What energy targets should I aim for?

We recommend the operational targets for new homes set out on this page, which are consistent with the *LETI Climate Emergency Design Guide*. Energy use targets are more transparent and robust than carbon reductions targets and are the best way to ensure zero carbon is delivered in practice.

What is an ultra low energy home?

An ultra low energy home is one which has a very low space heating demand. This requires a fabric efficiency and airtightness equivalent to that of a new Passivhaus home.

What is the most efficient form of heating system?

Heat pumps are considered the most efficient low carbon heat source keeping energy use to a minimum, while not using fossil fuels on site. Gas or oil boilers must not be used anymore.

Why set a renewable energy target?

Net Zero carbon in operation can only be achieved by increasing renewable electricity generation. Solar PVs represent a mature and easy to use technology.

Reducing the embodied carbon of a building

Limit the embodied carbon or emissions associated with the manufacture, transport, construction, repair, maintenance, replacement and deconstruction of building elements. This can be achieved by making informed design decisions based on quantified carbon reductions.

	KPIs New housing	KPIs Retrofit housing
Ultra low energy homes	Space heating demand 15 kWh/m²/yr	Space heating demand 50 kWh/m²/yr* *on average (range of 20-120 kWh/m²/yr)
Energy use and efficient heating	Energy Use Intensity 35 kWh/m²/yr	Energy Use Intensity 50 kWh/m²/yr *on average
Renewable energy	Electricity generation intensity 120 kWh/m^2_{fp}/yr m^2_{fp} : m² building footprint	Electricity generation intensity 120 kWh/m^2_{fp}/yr m^2_{fp} : m² building footprint
Embodied carbon	Embodied carbon benchmark 500 $kgCO_{2e}$/m²/yr	-

CIBSE TM59
Compliance with guidance on overheating risk

AECB
Good practice water standard

In-use performance
Collect data for the first 5 years

The electricity revolution: a greener grid and the future of heat

Towards a decarbonised and smarter electricity system

The carbon content of electricity has fallen over the last few years. It is now three times less than ten years ago and already lower than natural gas on a per kWh basis. It is forecasted to continue to reduce even further over the next 20-30 years. This explains the current energy revolution and why the electrification of transport and heat is the best strategy to move away from fossil fuels. It is also considered unlikely that hydrogen will play a significant role in heating our homes.

In order for this electricity revolution to be successful and as cost effective as possible it is very important to reduce energy use so that energy demand is not more than renewable and nuclear energy generation by 2050. If electricity demand is more flexible, it can also be matched to times of high renewable energy generation. Electric vehicle charging from homes will also create additional demand for electricity*.

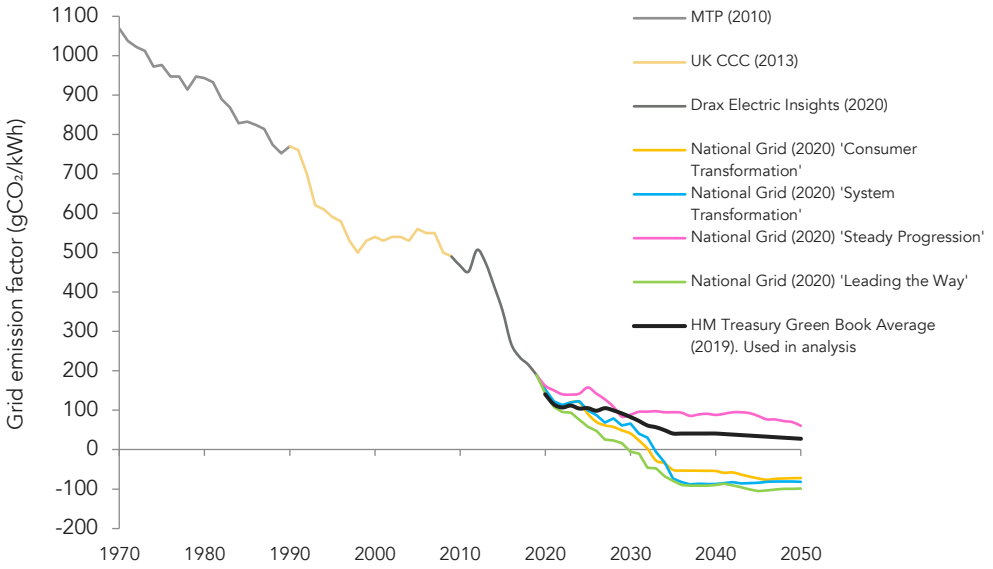
The impact on buildings

The electrification of heat (e.g. the replacement of gas boilers by heat pumps) is widely considered as one of the main priorities of decarbonisation. New gas or oil boilers should not be installed in buildings anymore, in new or existing homes.

Energy storage (e.g. hot water tank) and management (e.g. smart controls) as well as smart meters for Time of Use (ToU) variable electricity tariffs are all likely to become increasingly important.

In summary, electrification and digitalisation provide the backbone of decarbonisation for buildings.

** Electric vehicle charging is not currently covered by the Net Zero carbon home definition. It is captured in the assessment of transport emissions.*



Long-term variations in emission factor of grid electricity show the rapid historical reduction in emission factors *© Etude based on data from Market Transformation Programme, UK Committee on Climate Change, Drax, National Grid and HM Treasury.*

Note: *The National Grid Future Emissions Scenarios (FES) show that if the power sector removes CO_2 from the atmosphere by the growth of biomass and captures it when it is used in power stations, it could be carbon negative. This would rely on the use of Bioenergy with Carbon Capture and Storage (BECCS). Carbon Capture and Storage is a process in different steps: CO_2 produced is captured, transported away and isolated from the atmosphere in long-term storage in geological formations or for use in industrial processes). When more carbon is removed from the atmosphere and stored by a process than is emitted into the atmosphere, emissions are negative. BECCS features prominently in three of the four scenarios modelled in FES.*

The cost of Net Zero homes

There is a (small) cost premium

Achieving Net Zero as a society will have a cost. For some sectors it will require investments in Research and Development (R&D) as technological innovation is required. For others Net Zero compliant solutions exist but currently have a very high cost premium which needs to be reduced to be acceptable at scale.

New buildings are comparatively less challenging: technologies, techniques and processes required to deliver Net Zero carbon buildings in operation are already available and will only lead to a small cost premium compared with a Part L 2021 compliant house or block of flats, i.e. 2-6% additional capital cost.

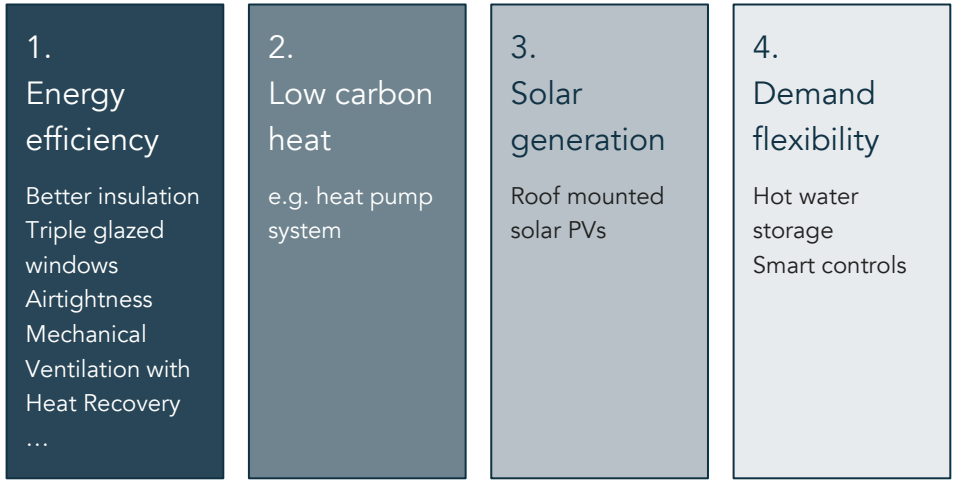
Lowering the embodied carbon of new buildings will be more challenging and requires both material and procurement innovations. However, this does not have to lead to a significant cost premium either.

A good deal for residents

Net Zero carbon homes are not only good for the planet: they will also be much cheaper to run than a standard new build house. This is due to the combined effects of a lower energy demand alongside greater flexibility of energy use during the day and of solar electricity generation and self consumption.

Avoided costs for society as a whole

All new buildings built to poor levels of energy efficiency and fitted with gas boilers will have to be retrofitted in the next 20-30 years in order to achieve Net Zero. The cost of future retrofit is significantly higher than the cost of 'getting it right now'. There are also wider off-site benefits in terms of reduced infrastructure costs as less renewable energy generation will be required.



Additional costs of Net Zero carbon buildings in operation can be split up into four key categories

Estimated savings on energy costs compared with a Part L 2021 compliant home

- No additional retrofit cost required later to achieve Net Zero
- Lower infrastructure costs

Savings on energy costs for residents and other savings for wider society

Go to section…

New housing

This section explains what can be done so that new housing forms part of the solutions to climate change, instead of adding to the problem.

The list of subjects it covers can be found on the following page.

New housing | Contents

Why? Key reasons for and benefits of Net Zero carbon new homes

Our buildings produce a lot of carbon – and are expensive to run

The emissions from our buildings account for 26% of the UK's total emissions. 18% of this total is from our homes. This is not only bad for the planet, it is bad for the occupants. It is therefore important for new homes to be designed and built to use significantly less energy which also means they would cost a lot less to run.

It is clear that a Net Zero UK means that we will have to significantly reduce energy use and carbon emissions from all buildings and, in particular, our homes. Even today, most new homes are being fitted with gas boilers and these will continue to emit carbon for perhaps 20 years and also degrade local air quality.

We haven't made any progress on this

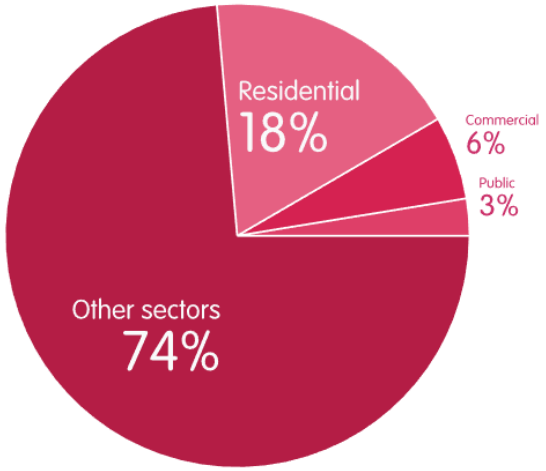
Despite rapid decarbonisation in many other sectors, the withdrawal of the Zero Carbon Homes target in 2016 has seen the energy performance of new homes remain almost constant over the last ten years. We need to do much better.

Heating is an important energy demand which can be reduced

Space heating during the winter months accounts for around 65% of the total energy demand in a new home. Space heating is an excellent proxy for the fabric efficiency of the building – i.e. the insulation in the walls, floors and roofs; the windows/doors and the ventilation system. This is why we need to concentrate on a 'fabric first' approach.

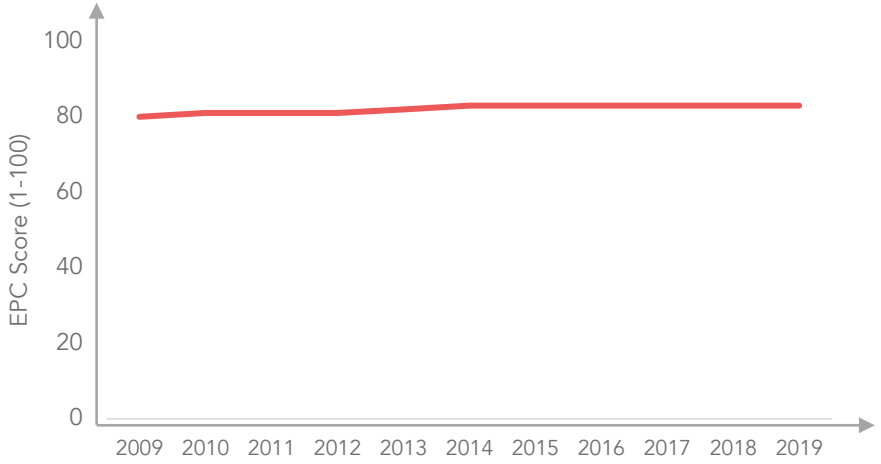
In summary

A Net Zero carbon home in operation is very energy efficient and has an ultra low level of space heating demand. It does not use any fossil fuels on site and therefore improves air quality. It also generates renewable energy on-site and is cheap to run.



UK CO_{2e} emissions, 2017

(Source: UKCCC Net Zero – Technical Report, May 2019. Includes direct (at the building) and indirect (at the power station) emissions.)



The EPC Score of new dwellings shows little improvement in the last 10 years

(Source: Live tables on Energy Performance of Buildings Certificates, MHCLG, 2020)

Key Performance Indicators (KPIs) and recipe for Net Zero carbon homes

Setting the right brief and targets is key

To achieve Net Zero carbon in reality, it is important that the brief and targets reflect this ambition from the start. A strong brief provides tangible guidance on how targets can be achieved. Best practice KPIs for new homes are listed in the table and all KPIs must be met for a home to be Net Zero carbon.

Getting the right team

Delivering Net Zero carbon relies on the effective and successful coordination of a shared vision. Therefore, getting the right team on board at the right time is critical. The early appointment of an energy consultant with a specialism in Passivhaus or ultra low energy design, as well as early consideration of embodied carbon are recommended. A 'Net Zero carbon kick-off workshop' can be used to ensure the wider consultant team are clear on the targets and objectives.

Consider Passivhaus certification

Passivhaus certification is considered a robust means to meet the space heating demand and Energy Use Intensity KPIs. It also drives quality assurance during construction. This involves the early appointment of a Passivhaus 'designer' to steer the design from concept stage and carry out PHPP (Passivhaus Planning Package) modelling. A Passivhaus 'certifier' will be required to act as an impartial quality assurance check on predicted performance during design and to carry out site inspections.

Is energy modelling required?

Using accurate energy modelling is always the recommended route, however it is possible to target best practice by setting the right specification and design requirements as part of the project brief though. Please refer to the 'How it all comes together' pages.

KPIs	New housing
Ultra low energy homes	Space heating demand 15 kWh/m²/yr
Energy use and efficient heating	Energy Use Intensity 35 kWh/m²/yr
Renewable energy	Electricity generation 120 kWh/m^2_{fp}/yr (m^2_{fp} : m² building footprint)
Embodied carbon	Embodied carbon benchmark 500 $kgCO_2e/m^2/yr$

CIBSE TM59
Compliance with guidance on overheating risk

AECB
Good practice water standard

In-use performance
Collect data for the first 5 years

What to do when? Timeline for design and construction

PRE-PLANNING	PRE-CONSTRUCTION	CONSTRUCTION	HANDOVER AND USE

Setting the brief and getting the right team

- Include Key Performance Indicators (KPIs) requirements in the brief
- Appoint the relevant consultants
- Require the assessment of embodied carbon particularly for medium to large scale developments.

Design considerations

- Optimise building form, orientation and window proportions
- Define building fabric performance e.g. U-values
- Allow sufficient thickness for all insulated walls, roofs and floor
- Incorporate Mechanical Ventilation with Heat Recovery (MVHR)
- Define airtightness strategy
- Consider low carbon heating options e.g. heat pumps
- Design roof to maximise renewables i.e. solar panels
- Carry out embodied carbon assessment

Detailing, specification and choosing the right products

- Include KPI requirements in the tender
- Detail build ups of all external elements including thickness and conductivity of all materials and contact suppliers for confirmation of U-values
- Identify all thermal bridges and conduct thermal bridge calculations
- Define airtightness testing requirement for contractor
- Specify high performing solar panels
- Agree scope of post-occupancy evaluation.

On-site quality inspections

- Run an ultra low energy workshop on site. Encourage contractor and team training to all attend.
- Review alternative materials or products proposed by the contractor and ensure these meet performance requirements to achieve KPIs
- Attend regular site visits and develop site quality tracker to assess against KPIs
- Witness commissioning of ventilation and heating systems.

Handover and use

- Provide building user guides and instructions e.g. sticker on MVHR for filter replacement routine
- Carry out lessons learnt review
- Carry out post occupancy evaluation (POE) during the first five years of use to verify KPIs have been met
- Ideally, publicise performance against all KPIs and POE reports e.g. on a company website

Best Practice Route

- Appoint Passivhaus consultant
- Energy (PHPP) modelling carried out by Passivhaus consultant to accurately predict energy use
- Detailed U-value calculations and thermal bridge analysis
- Regular inspections on-site by Passivhaus certifier
- Clear responsibility for airtightness and several air testing to meet requirements
- Passivhaus certification
- Final as-built energy (PHPP) model provided at hand-over

▶ Refer to design checklist in Appendix for a more comprehensive list of actions.

Getting it right from the start: form, orientation and window proportions

Getting the design right from the start is key

Making informed decisions at an early design stage is key to delivering energy efficiency in practice. A building's form, orientation and window proportions are all aspects that do not add extra construction cost, but if optimised within the design can significantly improve the building's efficiency. For more details refer to the *Passivhaus Design Easi Guide*.

What should the building form look like?

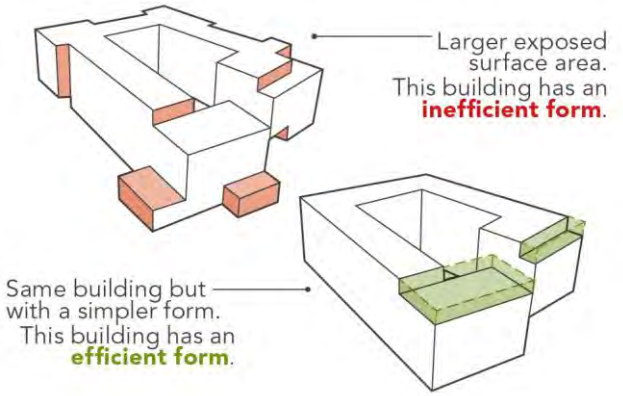
The building form should be as simple and compact as possible. This will reduce the exposed surface area for heat loss. Avoid or limit the use of stepped roofs, roof terraces, overhangs and inset balconies as these features will decrease the building's energy efficiency.

Which direction should the building face?

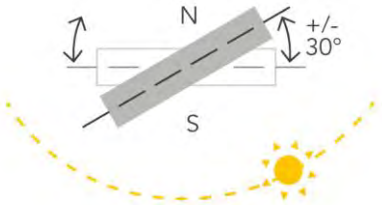
The orientation and massing of the building should be optimised if possible to allow useful solar gains and prevent significant overshadowing in winter. Encourage south facing dwellings with solar shading and prioritise dual aspect. Overshadowing of buildings should be avoided as it reduces the heat gain from the sun in winter.

How big should the windows be?

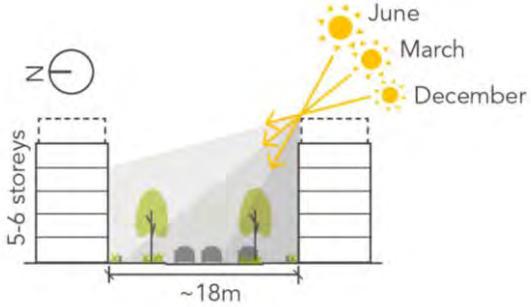
Getting the right glazing-to-wall ratio on each façade is a key feature of energy efficient design. Minimise heat loss to the north (smaller windows) while providing sufficient solar heat gain from the south (larger windows). It is much easier to design smaller windows facing access decks and larger windows facing balconies. Therefore, try to orientate access decks to the north and balconies to the south.



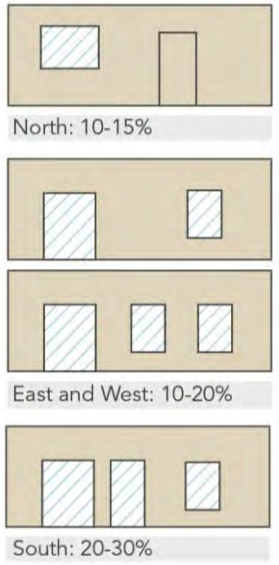
Designing the building to have an efficient form



Elevations facing +/- 30° south will benefit from useful solar gains in the winter



Allow a distance of 1-1.5 times the building's height between buildings



Recommended glazing percentages of each external facade

(Source: Levitt Bernstein + Etude)

Construction methods and quality

Choosing a construction method

There are many different construction methods that could be utilised for building low energy residential dwellings: brick and block, timber frame, steel frame, structurally insulated panels, insulated concrete formwork, to name a few.

A low energy target need not dictate the construction method, but some methods of construction lend themselves better to the aims of ultra low energy buildings than others.

For example, closed panel timber framing may deliver a better quality and more thermally efficient structure than an open panel timber frame. Similarly, a solid, insulated masonry wall may be easier to control for airtightness than a cavity wall.

Achieving quality construction

The quality of workmanship on-site has a big impact on energy performance. Pitfalls to avoid include badly installed insulation which will reduce its effectiveness (e.g. compressed insulation, uninsulated gaps, or wall ties not being installed correctly), and site operatives cutting through air-tightness layers.

Ways to mitigate these risk include:

- Frequent checks on-site of insulation and airtightness measures by someone who knows what to look for, so problems can be addressed along the way rather then be covered up.
- Utilising off-site construction methods, where there is factory quality controlled manufacture can help.
- Using schemes such as Passivhaus or BEPIT (Building Energy Performance Improvement Toolkit) can provide assurances of better construction quality.

Left: an example of good Expanded Polystyrene insulation installation. Right: An example of poorly installed partial cavity installation, loosely fitting, and cement dropped atop and inside cavity (Source: Etude)

A closed-panel timber frame, manufactured off-site with insulation, window and door frame included (Source: Vision Development).

Airtightness for new build

The importance of airtightness

Airtightness significantly improves energy efficiency and comfort, often for a relatively modest cost. New buildings must achieve an airtightness of at least 10$m^3/h/m^2$ as a minimum for building regulations, however new homes typically achieve levels of 3-5$m^3/h/m^2$. Best practice levels are considered to be <1$m^3/h/m^2$.

Start with a plan

Building airtight starts with a well thought through airtightness and ventilation strategy. Draw the airtightness line on plans and details, identifying which materials will form the airtight layer, and how they will be joined together. Identify challenging junctions, risks to airtightness, and consider how building services will interact with the airtight layer.

Use the right products

Experienced manufacturers of airtightness products such as Isocell, Isover, Pro-clima and Siga have developed their products to achieve airtightness that lasts for many decades. Specify good quality products and ensure that inferior substitutes are not used on site.

Stick to the plan on site

Once construction starts ensure the airtightness strategy is implemented precisely. Tradespeople should be briefed and the work regularly checked to ensure the airtight layer is being built correctly.

Test, then test again

Plan for at least two air tests. The first test should be completed as soon as the building is weathertight and while joints between different components in the airtight layer are still accessible so leaks can be repaired if necessary. The second test on completion.

A good airtightness strategy forms the basis of an airtight building. This is an excellent example of taped OSB, with a dedicated service cavity on internal walls. The service cavity means most wires and pipes will not breach the airtight OSB layer

(Source: Jim Miller Design)

Services entries present a risk to airtightness, however proprietary grommets are available to ensure airtightness can be achieved. The image on the left is of a ventilation duct as a reminder that airtight buildings must have a robust ventilation strategy.

(Sources: buildinghub.org.uk by user IanR, Ecological Building Systems)

Ventilation for new build

Controlled air flow through good airtightness

The key to managing ventilation in new dwellings is being in control of where, when and how air flows through a building. This starts with very good airtightness, to limit any uncontrolled infiltration. Trickle vents should be avoided as they do not control infiltration.

Install a Mechanical Ventilation with Heat Recovery (MVHR) unit

To maintain good air quality, and to reduce heat losses within a home the use of an MVHR is critical. Not only does this unit supply air into living spaces, and extract air from kitchen and bathroom spaces, it does this using very little energy.

It is important that the unit is positioned as close as possible to an external wall to prevent heat loss from the ductwork that connects to the outside. These ducts should be accurately fitted with adequate insulation to prevent heat loss, and generally ductwork should avoid having sharp bends which could affect pressure loss and flow.

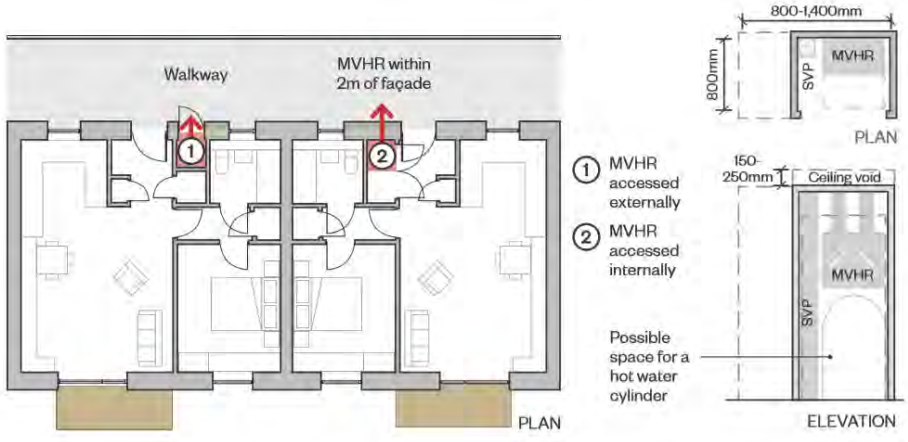
MVHR units include filters that must be changed regularly (usually at least once per year but check the manufacturer's instructions).

You can still open windows

There is a myth that 'sealing up' a building means you can no longer open the windows. This is not true. The benefit of an MVHR is that you do not have to open windows in winter for fresh air, letting the heat escape. Residents can open windows and use the homes normally.

Trust the controls

A common issue is a lack of understanding or trust that the unit is working correctly, and then it underperforms due to inappropriate user adjustments, or a user turning off the MVHR completely.



MVHR systems are an effective way of providing ventilation to airtight homes. The unit should be located within 2m of the façade (Source: Levitt Bernstein + Etude)

Key requirements for a good MVHR system	
Distance from external wall	<2m
Specific fan power	<0.85 W/l/s
Heat recovery	>90%
Thickness of duct insulation mm	>25mm
Certification	Passivhaus Certified
Maintenance	Easy access for filter replacement.

In order to have an efficient running MVHR, it is recommended to choose an MVHR that meets the above performance criteria

Avoiding overheating

Design out overheating from the start

Overheating is a known risk and can be reduced through good design:

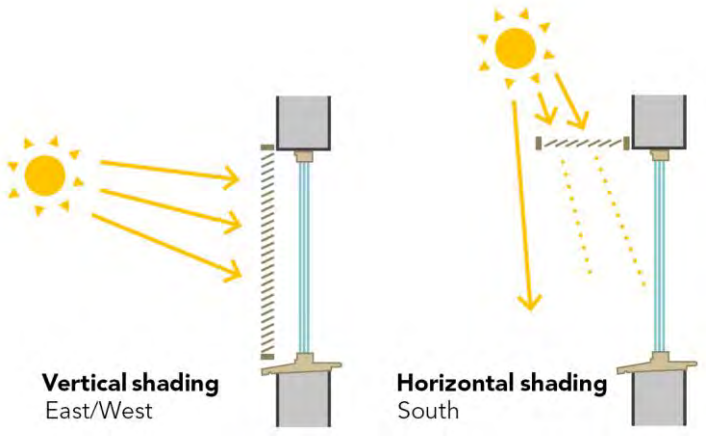
- Ensure glazing areas are not excessive i.e. not more than 20-25% of facade on south or west façades.
- Avoid fixed panes and maximise opening areas of windows. Side hung windows typically allow more ventilation than top hung.
- Favour dual aspect homes to allow cross ventilation.
- Provide appropriate solar shading. South façades should have horizontal shading over the window and the west façade should ideally have movable vertical shading e.g. shutters.
- Avoid relying on internal blinds, which can be removed by residents.
- Select a g-value (the solar factor indicating how much heat is transmitted from the sun) for glass of around 0.5 where possible.
- Use Good Homes Alliance overheating checklist for risk assessment.

Consider potential conflicts

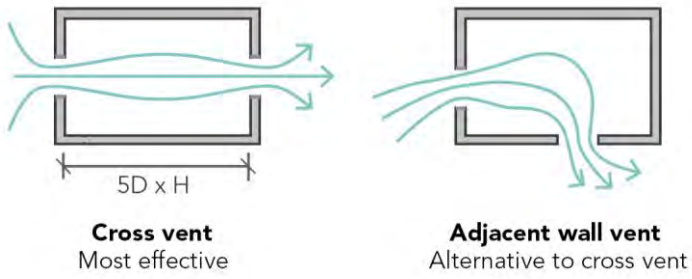
Daylight and acoustics design can conflict with overheating assessments. Use the Acoustics and Noise Consultants (ANC) Acoustics, Ventilation and Overheating Guide to determine an approach to acoustic assessment and seek to maximise daylight without significantly adding to the overheating risk.

Carry out overheating modelling

Dynamic modelling should be undertaken to identify more clearly the risk of overheating and how to mitigate it. Prior to any planning submission, checking compliance with CIBSE guidance TM59 is recommended. A statement should be produced as part of the assessment to demonstrate the strategies can be implemented.



Provide horizontal shading on the south facade (e.g. brise-soleil or deep reveals) and vertical shading on the east or west façade (e.g. shutters). Design solar shading to allow useful solar gains in winter and block solar gains in summer.



Design for dual aspect homes to allow for natural cross ventilation

Myth buster – a common myth is that ultra low energy design with airtight construction leads to overheating. It is true that any building which does not design in measures to address overheating effectively will be at risk of overheating (i.e. inadequate shading or insufficient openable windows etc.) but this is not a result of ultra low energy design.

Low carbon heat: design, commissioning and operation of heat pumps

The electricity grid has decarbonised and will continue to decarbonise, thus the most likely low carbon heat source for now and the future is electricity. This is done most efficiently, and has lower running costs, when using heat pumps.

What types of heat pumps are available?

There are lots of different types of heat pumps, broadly in two categories, individual heat pumps and communal heat pumps. Individual heat pumps are shown in the adjacent diagram. For more information on communal systems continue to the next page.

Designing heat pumps

Make sure that the heat pump is sized correctly to meet the heating and hot water load. Choose a heat pump with a refrigerant that has a low Global Warming Potential (GWP) - Propane is currently market best practice. Minimise pipe lengths to reduce the heat losses from distribution. Choose a heat pump with a high efficiency (often referred to as the Coefficient of Performance or COP).

Radiators might be larger

Heat pumps run best at lower temperatures (around 35-45°C degrees) this means that radiators may need to be slightly larger to emit the same amount of heat as a traditional radiator.

Commissioning and handover

Make sure it provides the right quantity of water and the right temperatures. Make sure the user understands how the heat pump works and why it is set to operate in a certain way.

	Heating	Hot Water
 Monoblock or split heat pump	✓	✓
 Ground source heat pump	✓	✓
 Heat pump integrated domestic hot water store	✗ Heating is provided by direct electric panel radiators	✓
 Exhaust air heat pump	✓ Provides some level of heating by heating air that is circulated through the home*	✓

This diagram above shows four types of individual heat pumps that can be installed in homes (Sources: Valliant, Mitsubishi Electric, Nilan, Dimplex)

** For ultra low energy homes this can provide the majority of the heating, but direct electric panel radiators may be needed for peak winter conditions or additional comfort*

Low carbon heat: design, commissioning and operation of heat pumps (continued)

What is a communal heating scheme?

Rather than each home having their own heat pump or boiler, in a communal heating scheme heat is generated in a central plant room, and distributed. Each home has a heat interface unit which heats up the water that the home needs. Traditionally fed by gas boilers, these systems now need to rely on heat pumps.

Heat is lost in distribution

Even with well insulated pipes, heat is lost when you transport hot water through pipes. For ultra low energy schemes that do not need much heat, more than 50% of the heat that is generated by the communal heating system can be lost through the distribution pipe work, this makes traditional communal heating very inefficient.

Communal heat pumps are not very efficient

The supply temperature for communal heating systems is generally between 60-80°C. However, heat pumps operate best at lower temperatures. This and the fact that so much heat is lost through distribution means that communal heat pumps are generally not recommended.

Ambient loops with heat pumps in every home

An ambient loop system is a totally different type of system, and is a hybrid between communal heating and individual heat pumps. A small 'shoebox' style water source heat pump per home, is connected to an ambient loop that usually fluctuates between 10-25 °C. The communal heat pumps upgrade the heat in the ambient loop to the temperature required for the home. The ambient loop is either a 'passive' loop coupled with the ground (a bit like a ground source heat pump) or an 'active' ambient loop connected to communal air source heat pumps.

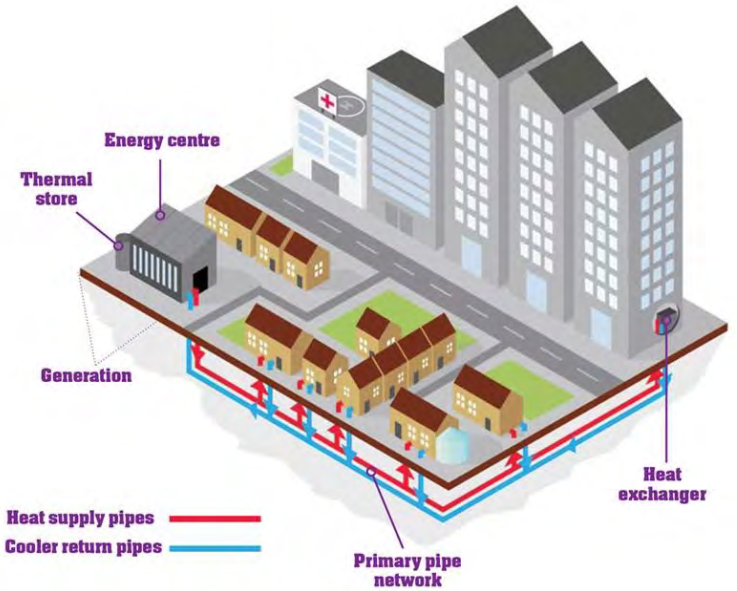


Diagram showing a traditional communal heating scheme connected to many homes from and energy centre containing the central plant (Source: E&T)

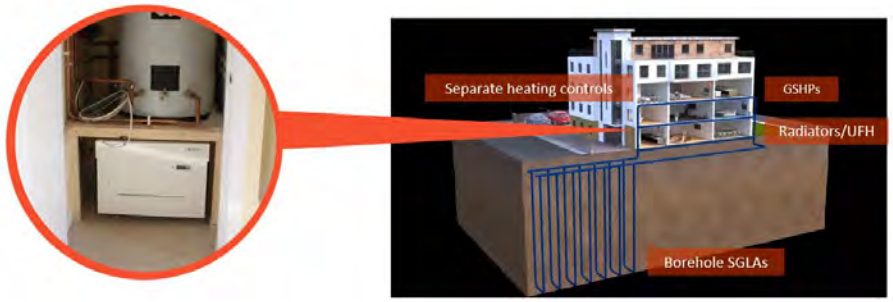


Diagram showing a passive ambient loop, with a small 'shoebox' style water source heat pump in each home connected to a ground array (Source: Kensa)

Which heat pump is best for me?

There are various types of heat pump options available for new homes. This page outlines which heat pumps are available and which to choose.

1 **Which heat pumps are the best for new homes?**

- Monoblock or split (air source) heat pump, generating heating and hot water
- A ground source heating pump system, generating heating and hot water
- Individual heat pump connected to an ambient loop

Why these heat pumps might not be suitable

- **Available space:** These heat pumps require space for indoor or outdoor units
- **Ground conditions:** Some ground conditions are not suitable for ground source heat pumps
- **Size of development**: an ambient loop is only really suitable when there are more than 30 homes

If these systems do not work

2 **Which are next best for new homes with a low space heating demand?**

- A heat pump integrated into a hot water tank. Heating is delivered through direct electric panel radiators
- An exhaust air heat pump (with direct electric panel radiators likely to be needed for winter peak conditions and/or additional comfort)

- An exhaust air heat pump provides comfort heating via an MVHR. This will only meet the heat demand in smaller dwellings (<60m^2) with a space heating <15kWh/m^2.year, Even then, it may need another form of top-up heating.

If these systems do not work

3 **Communal heating systems fed by heat pumps (operating at around 60°C or less)**

New homes with a high performing fabric need so little heat, that is it not recommended to use communal heating or district heating systems, as so much heat is lost through the distribution

If this system is not available

4 **Consider direct electric heating and hot water**

If there is not sufficient space to install a heat pump, then consider direct electric heating and hot water but make sure the energy efficiency KPIs are being delivered to avoid high running costs.

Water efficiency and domestic hot water

Reduce overall water consumption

Water efficiency is about reducing our use of mains water and the effect our buildings have on water resources. Water use should not exceed 110 litres per person, per day, ideally less.

Reduce hot water to reduce energy use

In very low energy buildings, the energy required for hot water can exceed the amount of energy required for space heating. Therefore optimisation of hot water systems is essential to ensure energy use remains low.

What can you do?

Reduce flow rates

- The AECB water standards (opposite) provide clear guidance on sensible flow rates for showers and taps in low energy buildings.

Reduce distribution losses

- All pipework must be insulated and designed to ensure there are no 'dead legs' containing more than 1 litre. Tapping points (e.g. taps, shower connections) should be clustered near the hot water source. Small bore pipework should be carefully sized based on peak demands, minimising the diameter where possible.

Insulate to minimise losses from hot water tanks

- The standby losses of hot water tanks are highly variable, and can have a significant impact on overall energy use. Target a hot water tank heat loss of less than 1 kWh/day equivalent to 0.75 W/K.

Install waste water heat recovery systems in shower drains

- A simple technology that recovers heat from hot water as it is drained. Vertical systems can recover up to 60% of heat more than common horizontal ones recovering 25-40%.

Consider water recycling

- This is the process of treating waste water and reusing it, it can be used for large portions of potable water use.

Appliance / Fitting	AECB Good Practice Fittings Standard
Showers	6 to 8 l/min measured at installation. Mixer to have separate control of flow and temperature although this can be achieved with a single lever with 2 degrees of freedom (lift to increase flow, rotate to alter temperature). All mixers to have clear indication of hot and cold, and with hot tap or lever position to the left where relevant.
Basin taps	4 to 6 l/min measured at installation (per pillar tap or per mixer outlet). All mixers to have clear indication of hot and cold with hot tap or lever position to the left.
Kitchen sink taps	6 to 8 l/min measured at installation. All mixers to have clear indication of hot and cold with hot tap or lever position to the left.
WCs	≤ 6 l full flush when flushed with the water supply connected. All domestic installations to be dual flush. All valve-flush (as opposed to siphon mechanism). WCs to be fitted with an easily accessible, quarter turn isolating valve with a hand-operated lever. Where a valve-flush WC is installed, the Home User Guide must include information on testing for leaks and subsequent repair.
Baths	≤ 180 litres measured to the centre line of overflow without allowing for the displacement of a person. Note that some product catalogues subtract the volume of an average bather. A shower must also be available. If this is over the bath then it must be suitable for stand-up showering with a suitable screen or curtain.

Refer to the full AECB document for more information.

Solar PV panels for houses

Solar PV panels are a simple, mature and reliable renewable energy technology. The majority of new homes have sufficient space on site to generate as much energy as they need on an annual basis. They are a particularly good match for heat pumps, where much of the solar electricity can be used to provide heating and hot water.

Can you save much with Solar PV?

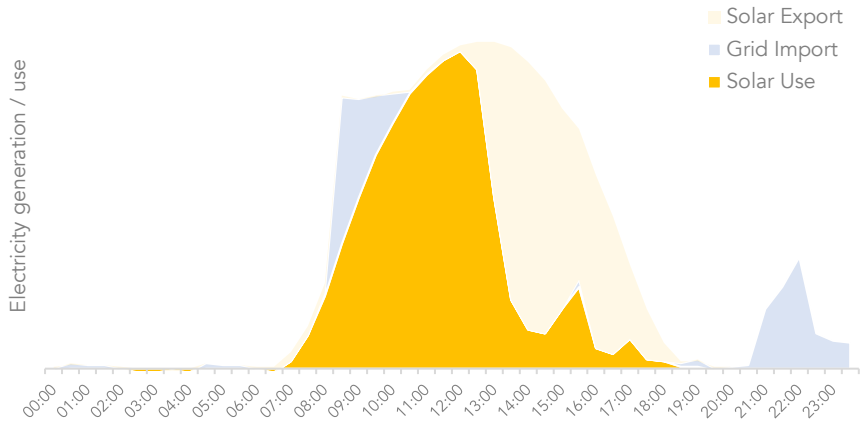
The lifetime cost of solar electricity in the UK is typically around half the price of grid electricity. Solar PV panels will therefore save money and carbon emissions by avoiding the need for your home to import electricity from the grid, and by exporting surplus energy back to the grid. Export tariffs typically pay around 5.4p per unit of electricity sold. Expect to use anywhere from 15%-50%+ of solar energy directly, depending on how well a home's consumption is matched to the sun.

Where to install solar PV panels

Solar PV panels are typically installed on roofs as these often provide unshaded locations facing the sun for much of the day. They can be installed on flat roofs, pitched roofs, and even on walls or pergolas. A solar installer can advise you as to the most suitable locations.

Choosing a good installer

Prices and installation quality vary between installers, so choose carefully. Small residential systems should typically cost around £1,500 per kW. The government regularly publishes *Solar PV cost data* if you want to check the latest prices. Look for a genuine and experienced Microgeneration Certification Scheme (MCS) certified installer that has a track record. Treat offers of 'free solar' with caution, these are typically financed systems, where you enter a long-term contract to pay a monthly fee. This can complicate selling or mortgaging your home.



This graph shows how solar works in practice on a sunny day. In the morning, solar energy is used to heat the home or a hot water tank, or charge an electric car. By early afternoon the hot water tank and electric car are both fully charged, so most solar energy is then exported. In the early morning and the evening, electricity is imported from the grid.

To maximise solar self-consumption, prioritise smart thermostats, solar hot water diverters, and solar electric vehicle charging. Residential batteries are expensive and can significantly increase the embodied carbon of solar energy, so avoid them unless absolutely necessary.

(Sources: Tado, Marlec Engineering Co., Myenergi)

Solar PV panels for blocks of flats

In the UK it is generally possible for blocks of flats up to six stories in height to achieve a net zero energy balance on site through the use of rooftop solar PV arrays, heat pumps and efficient building fabric.

The value of solar PV panels

A key challenge for solar panels on multi-residential buildings is figuring out how to maximise the financial benefit to occupants. Exported solar energy is only worth about 5.4p per unit, whereas electricity typically costs about 16p per unit to buy. Savings are therefore greatest if solar electricity can be used directly, avoiding the need to buy grid electricity.

Connection options

The simplest option is to connect the solar PV panels to the landlord's supply, collect export tariff payments and issue a solar dividend to tenants, but this offers the lowest financial benefit.

A traditional approach to increase savings is to 'split' the array into many smaller arrays, and connect each one directly to each flat so the electricity can be used directly, however this can increase complexity and costs. A more elegant solution is the 'solar tenant model', pioneered in Germany. In this case, the building has a single electricity meter with the energy supplier and the landlord manages sub-meters to each flat. Bills are issued to tenants based on their share of the net consumption of the building from the electricity grid, maximising solar self-consumption.

Choosing a good installer

Large residential systems should cost under £900 per kW. Check government *Solar PV cost data* to make sure you get a good deal.

East/West facing concertina type solar arrays are usually the best solution for the flat roofs of blocks of flats. They generate less energy per panel than rows of south facing panels, but achieve much higher panel densities as they do not require large gaps between the rows to avoid interrow shading. (Source: K2 Systems)

South facing solar facades produce around 15% less energy than an East/West concertina array, but generate more electricity than an East/West array in winter months. For buildings with heat pumps, this can be a great match. (Source: Solarbuildingtech.com)

Smart controls and demand flexibility

Intuitive and flexible energy use

Demand response or energy flexibility refers to the ability of a system to reduce or increase energy consumption for a period of time in response to an external driver (e.g. energy price change, grid signal). Energy storage allows these systems to consume, retain and release energy as required in response to specific energy demands. Smart controls respond to these external drivers and demands to manage our systems.

Maximise renewables and stabilise the grid

These measures can help maximise the utilisation of on-site renewables and help stabilise demand on the grid. Moreover it will help to decarbonise the grid: when renewable electricity generation is low, demand response measures reduce the load on the grid, reducing the amount of peak gas plant that must be switched on to meet the grid demand.

Smart controls and demand response measures in the home (Source: SMA Solar UK)

What can you do?

Peak reduction

- Use passive measures and efficient systems to reduce heating, cooling and hot water peaks

Active demand response measures

- These measures reduce the electricity consumption for a certain period.
- Install heating and cooling set point control with increased comfort bands, controlled with smart thermostats or home energy management systems.
- Integrate thermal storage of heat into communal or individuals system within a building.
- Reduce lighting ventilation and small power energy consumption

Electricity generation and storage

- Use products that can generate electricity and feed into the grid, or power the building.
- Consider solar to water heat storage

Electric Vehicle (EV) charging

- It is generally accepted that there will be a large increase in electric vehicles, so it is essential to implement demand response to ensure grid stability.
- Charge EVs only when needed and allow the supplier to cut the charging short during peak times
- Install 'Vehicle to Grid' / 'Vehicle to Home' technology which allows the EV battery to be used to supply the home during grid peak periods.

Behaviour change

- Raise awareness of how people use electricity and the impacts.
- Consider incentives to reduce peak demand.
- Encourage responsible occupancy.

Microgrids

- Consider being part of a small semi-isolated energy network, separate from the national grid.

Embodied carbon

Embodied carbon includes the carbon emissions associated with the extraction and processing of materials, energy use in the factories and transport as well as the construction of the building and repair, replacement and maintenance. It also includes the demolition and disassembly of the building at the end of its life. Low embodied carbon design is not inherently more expensive or more complex, it just requires awareness and good design.

What can you do?

1 **Refurbishment over new build**
Only build new when existing homes cannot be reused or refurbished.

2 **Lean design**
Structural: Design structure for 100% utilisation. Use bespoke loading assumptions, avoid rules of thumb. Reduce spans and overhangs.
Architectural: Use self-finishing internal surfaces. Reduce the quantity of metal studs and frames.
Building services: Target passive measures (e.g. improved fabric) to reduce the amount of services. Reduce long duct runs, specify low Global Warming Potential (GWP) refrigerant (max. 150) and ensure low leakage rate.

3 **Material and product choice**
Prioritise materials that are reused, reclaimed or natural from local areas and sustainable sources and that are durable. If not available use materials with a high recycled content. Use the following material hierarchy to inform material choice particularly for the building structure;

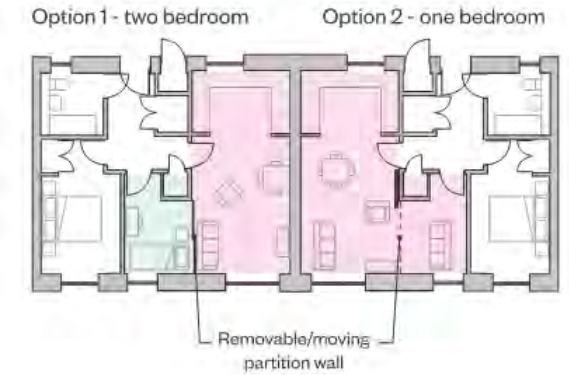
1. Natural materials e.g. timber
2. Concrete and masonry
3. Light gauge/Cold rolled steel
4. Hot rolled steel

Ask manufacturers for Environmental Product Declarations (EPD) and compare the impacts between products in accordance with BS EN 15804

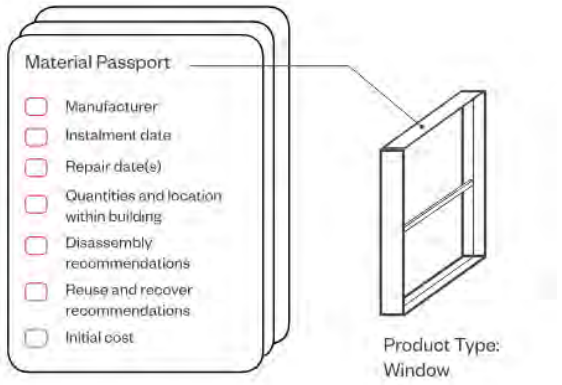
4 **Housing adaptation & flexibility**
Allow for flexibility and consider how a layout may be adapted in the future.

5 **Easy access for maintenance**
Maintained equipment will last longer.

6 **Design for disassembly**
Consider disassembly to allow for reuse at the end of life of the building. Create material passports for elements of the building to improve the ability of disassembled elements to be reused.



Design for adaptation using a flexible floor plan e.g. one bed flat can be converted to a two bed fat or a one bed fat with space for home working. Working to a regular grid with removable partitions will allow adaptation as well as creating soft spots in the structure. (Source: Elementa)



Create material passports for products: This will improve the ability of disassembled elements to be reused. A material passport provides identification of materials, components and technical characteristics with guidance for deconstruction and applicability of re-use. In this way the building becomes a material bank for future use. (Source: Elementa)

How it comes together - new terrace house

Design checklist

Form efficiency

Ensure the building form is as simple and compact as possible

Window proportion

Follow recommended ratio of window to external wall

Mechanical ventilation

MVHR 90% efficiency

≤2m duct length from unit to external all

Airtightness

Airtight building fabric

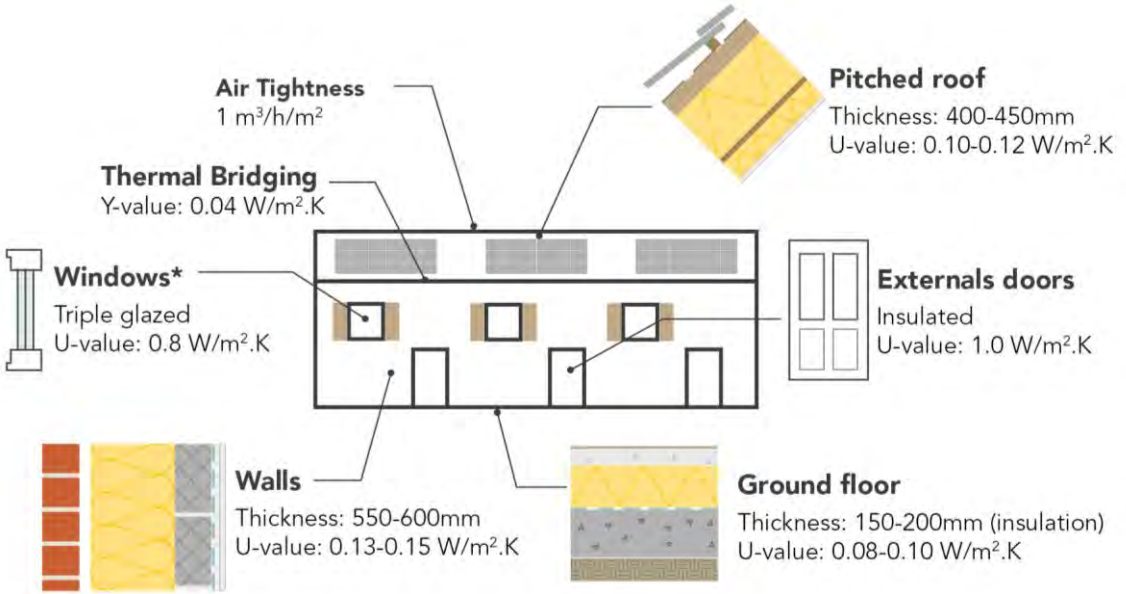
< 1 $m^3/h/m^2$ at 50 Pa

Heating system

Choose a low carbon heating system e.g. heat pump

Design out overheating

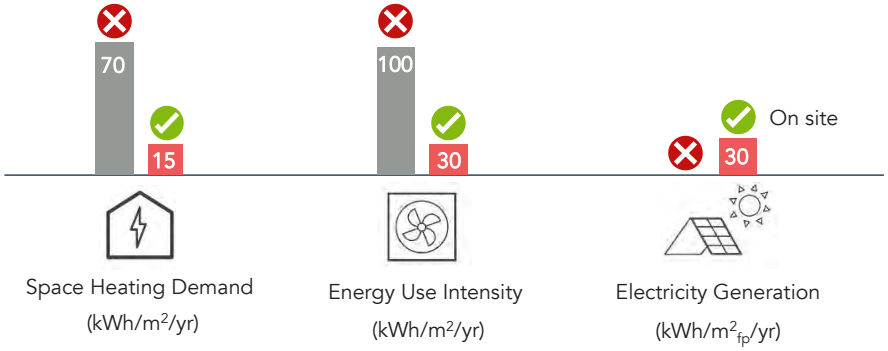
Carry out overheating analysis (as per CIBSE TM59 guidance) and reduce overheating through design e.g. external shading, openable windows and cross ventilation



Performance

As electricity generated on site with PVs is the same as the Energy Use Intensity (EUI) on an annual basis, the building is Net Zero carbon in operation.

- Typical terrace house built to comply with building regulations
- New zero carbon terrace house



How it comes together – small block of flats (6-8 units)

Design checklist

Form efficiency

Ensure the building form is as simple and compact as possible

Window proportion

Follow recommended ratio of window to external wall

Mechanical ventilation

MVHR 90% efficiency

≤2m duct length from unit to external all

Airtightness

Airtight building fabric

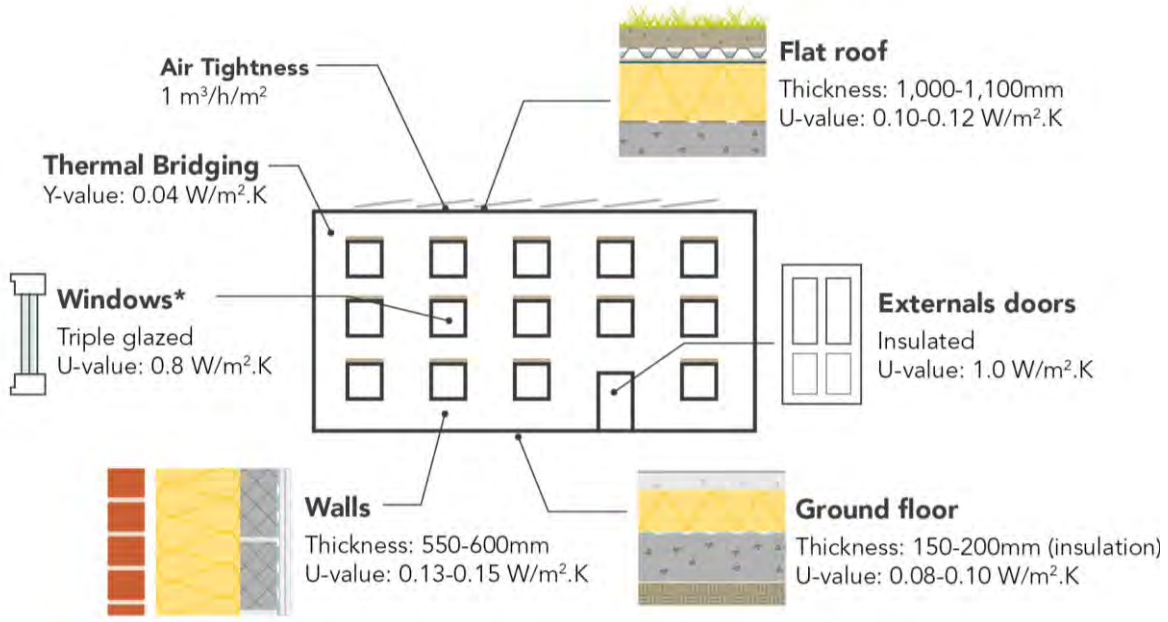
< 1 $m^3/h/m^2$ at 50 Pa

Heating system

Choose a low carbon heating system e.g. heat pump

Design out overheating

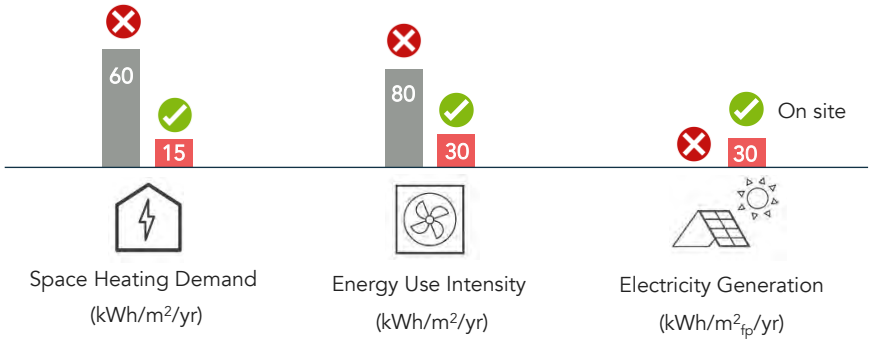
Carry out overheating analysis (CIBSE TM59) and reduce overheating through design e.g. external shading, openable windows and cross ventilation



Performance

As electricity generated on site with PVs is the same as the Energy Use Intensity (EUI) on an annual basis, the building is Net Zero carbon in operation.

- Typical terrace house built to building regulations
- New zero carbon terrace house



Cost premium for a Net Zero new home

A 2-6% cost premium for Net Zero carbon in operation…

The cost premium for delivering a new Net Zero carbon home is estimated to represent approximately 2 to 6% compared with a Part L 2021 equivalent.

The majority of additional costs is associated with the energy efficient fabric and ventilation and in particular with triple-glazed windows, airtightness and MVHR, as well as additional PV generation. There is no significant additional cost for the heating system as Part L 2021 is already seeking to accelerate the transition to heat pumps.

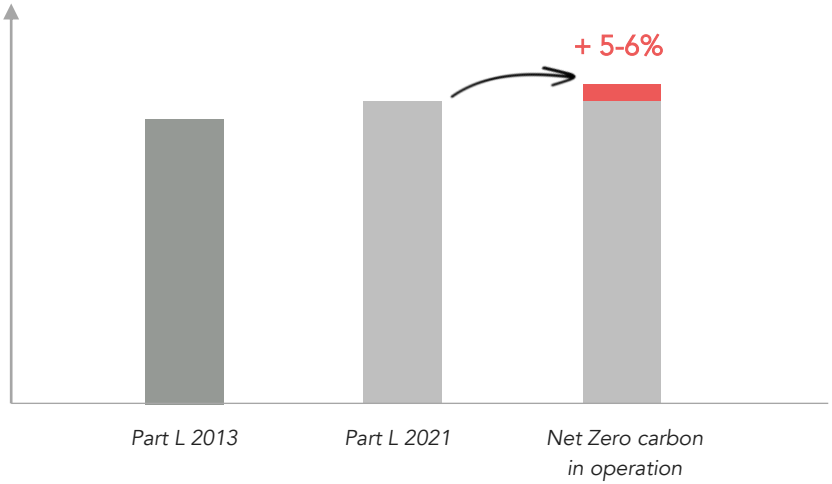
and the potential to drive down costs

A significant advantage in committing to Net Zero new homes is that it is a sustainable standard for the future. This offers significant opportunities for clients, contractors and project teams to reduce their additional costs over time by improving processes (e.g. airtightness) or contributing to driving down the cost of key technologies. There has been a significant reduction in the cost of solar PVs in the last ten years and other reductions, albeit smaller, are expected for heat pumps and MVHR.

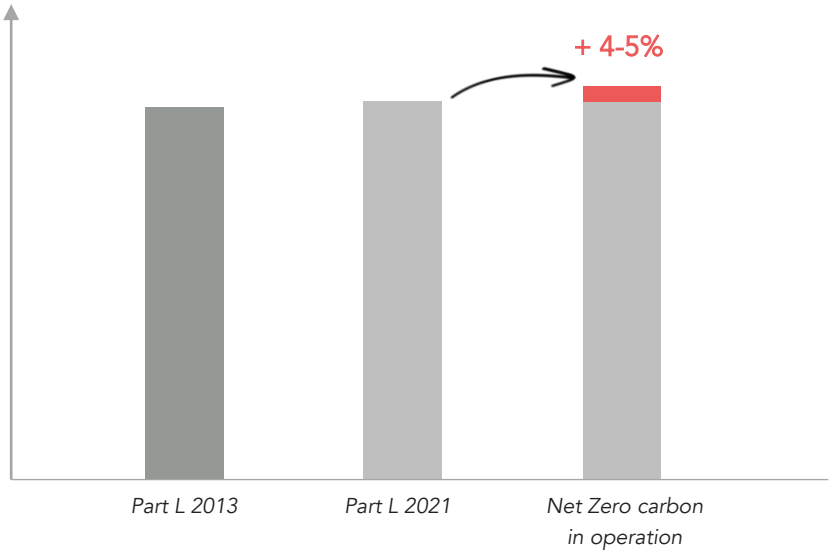
Significant cost savings for the residents

Using the same typologies as examples, a Net Zero carbon home is expected to lead to residents' energy bills which will be approximately 35-40% lower than compared to a Part L 2021 house.

For blocks of flats, an even greater level of reduction in energy costs appears to be possible, approximately 50%.



Estimated cost premium for a typical ***new terrace house***



Estimated cost premium for a typical ***new block of flats***

Don't do this! (new build)

The intention of this toolkit is to provide clear guidance on what you should do when designing and building a Net Zero carbon building. This page summarises some of the "Don'ts"…

Don't be misled by technologies and environmental schemes

When looking to build sustainable and low energy buildings, there are plenty of distractions. Many products, systems and technologies are suggested to be silver bullets in helping achieve Net Zero carbon buildings. Unfortunately, when put under scrutiny, many products or strategies do not achieve the desired outcome.

Additionally environmental assessment schemes for new homes are generally not sufficient to help the building achieve Net Zero carbon: a specific ambition is required.

Avoiding business as usual

There is an emerging consensus in the construction industry on how to achieve Net Zero operational carbon. For example, there are several key energy efficiency, heating and ventilation principles which need to be adopted which have been discussed in earlier sections. Taking a business as usual approach to construction is not sufficient because many traditional ways of heating and ventilating homes are not aligned with a Net Zero objective.

X *Do not install gas boilers. (Source: Worcester)*

X *Do not install open fireplaces. (Source: Lytton)*

X *Do not install extract only ventilation systems. (Source: Ventaxia)*

X *Do not install domestic wind turbines. (Source: Suzlon energy Limited)*

X *Do not rely on trickle vents to provide ventilation. MVHR should be adopted. (Source:Greenwood)*

X *Do not install double glazed windows: prefer triple glazed windows. (Source: Classic window Replacement)*

Beyond energy

Considering the wider sustainability picture

Beyond energy, there are many design decisions that affect a home's impact on the environment and carbon emissions. Below are some things to consider and signposts to additional information.

The Home Quality Mark (HQM) is a certification scheme designed by the Building Research Establishment (BRE). There is a strong focus on sustainability, and the guides are available to download for free. They can be used to guide design decisions whether or not a developer decides to proceed with certification.

Choosing a site

There are many questions to consider when choosing a site:

- Is there an existing building that could be refurbished instead of demolished?
- What are the transport links like? Will occupants be dependant on using a car? (CO_2 emissions from local car use can represent a large proportion of a household carbon footprint).
- What biodiversity does the site support and how can the new development contribute to achieving biodiversity net gains over and above policy and legislative requirements and to creating new green infrastructure?

Facilitating sustainable transport

- Consider supplying properties with electric vehicle charging points – either shared or individual.
- Convenient and secure cycle storage is effective in encouraging journeys by bike – how can they be integrated into the design?
- Does the home support effective homeworking? Are there sufficient plug sockets and internet connectivity sockets? Should a home office be considered?

Resources

One Planet Living

Home Quality Mark

Transport

Cycle Stores

Ecology and biodiversity

Wildlife Trust: Homes for people and wildlife

Biodiversity Enhancement in New Housing Developments

Building with Nature

Beyond energy

Supporting ecology and biodiversity

We are in an ecological emergency as well as a climate emergency, both of which are inextricably linked. Supporting and enhancing biodiversity and green infrastructure will benefit occupants, the wider community and economy with improvements to health, better water management, reductions in pollution etc as well as being of value to species and habitats.

Using water efficiently

It is little known that demand for water is projected to outstrip supply in future years. Therefore installing water efficient fittings is very important in new homes. It can also save energy and costs related to heating water. The AECB water standards provide guidance on water efficiency for all fittings.

Reducing flood risk through Sustainable Urban Drainage (SuDS)

Changes to our climate are predicted to result in increased rainfall and greater risk of flooding. Integrating SuDS into a development can greatly improve the site's ability to capture, absorb and effectively retain water as part of a comprehensive green infrastructure design. This will reduce surface water run-off and support local drainage networks to function effectively, reducing the risk of flooding.

Creating a healthy environment

Our homes are places that should support our health and wellbeing. Consideration to the materials chosen can have a beneficial effect on people's health. For example volatile organic compound (VOCs) content) can cause short term irritation for some people, and long term health problems. Ventilation and good indoor air quality are also discussed in this toolkit.

Resources

Water

- *Developing Water Efficient Homes*
- *Advice on Water Efficient Homes for England*
- *AECB Water Standards*

Sustainable Urban Drainage

- *CIRIA Guidance*

Healthy environment

- *Good Homes Alliance: Healthy Homes*

Case studies for new build

Ultra low energy design is fast becoming the new normal

The energy efficiency of new homes is increasing year on year. Many self builders and developers are choosing to go beyond building regulations for energy efficiency because it makes sense. Not only can low energy building be cheaper to run, they can be easier and cheaper to maintain and crucially, will not need further expensive retrofit in the future.

Beautiful and efficient homes

Lark Rise in the Chiltern Hills is certified to Passivhaus Plus standards. It is entirely electric, and generates 2.5 times as much energy as it consumes in a year. Careful optimised design has meant that it has a mostly glazed facade, minimal heat demand and stable temperatures over summer months.

Passivhaus/Ultra-low energy can be delivered at scale

Developers are building Passivhaus at scale. Example developments include Hastoe's development of 14 units – a mixture of houses and flats at Wimbish, Essex. The development is certified to Passivhaus standards, and average heating costs for the houses are £130/year. The development is operating as designed, and has effectively eliminated the 'performance gap'. Other examples include Springfield Meadows in Oxfordshire, Goldsmith Street in Norwich, Agar Grove in Camden and many other developments across the Country. Like Wimbish, they have an energy consumption of approximately less than half of that of a typical home.

Lark Rise, Chiltern Hills.

Passivhaus Plus certified.

(Source: Bere:architects)

Springfield Meadows

(Source: Greencore construction with Bioregional)

Wimbish

Passivhaus certified.

(Source: Hastoe Housing Association)

Other typologies beyond housing (e.g. schools, offices, etc.)

Other building types tend to vary more widely than housing, making it more difficult to reliably determine generic forms, energy use or occupancy models. However, the RIBA, LETI, the UKGBC and other organisations have published relevant guidance on performance targets for space heating demand, total energy use and renewable generation. They are summarised below.

Schools

- Space heating demand of 15-20 kWh/m$^2_{GIA}$/year
- Total energy consumption of 65 kWh/m$^2_{GIA}$/year or less
- Solar electricity generation that exceeds metered energy use on site

Hotels

- Space heating and cooling demand of less than 30 kWh/m$^2_{GIA}$/year
- Total energy consumption of 55 kWh/m$^2_{GIA}$/year or less
- Solar electricity generation of at least 120 kWh/m$^2_{GIA}$/year

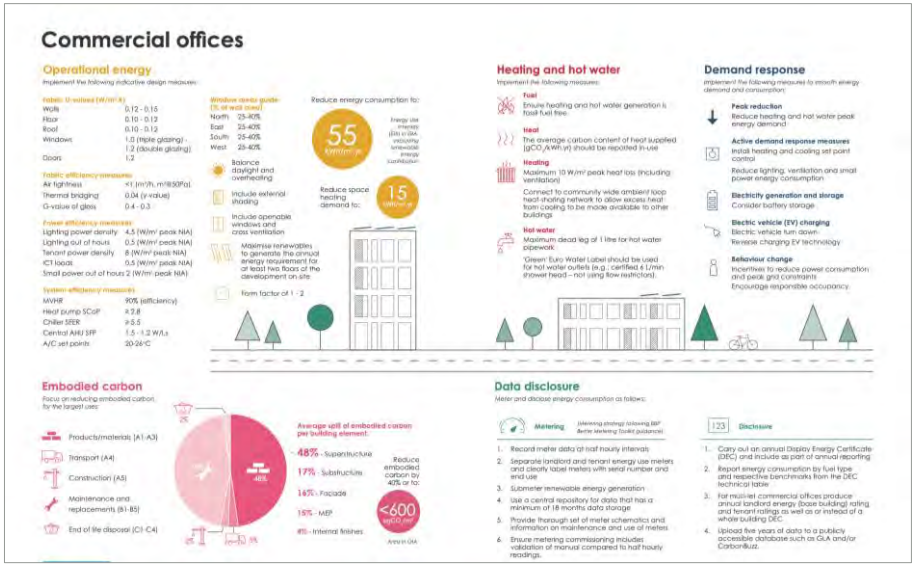
Offices

- Space heating and cooling demand of less than 15 kWh/m$^2_{GIA}$/year
- Total energy consumption of 55 kWh/m$^2_{GIA}$/year or less
- Solar electricity generation of at least 120 kWh/m$^2_{GIA}$/year

Light Industrial

- Space heating and cooling demand of 15-30 kWh/m$^2_{GIA}$/year
- Total energy consumption of around 55 kWh/m$^2_{GIA}$/year excluding specialist processes.
- Solar electricity generation of at least 180 kWh/m$^2_{GIA}$/year

Harris Academy Sutton: a large secondary school built to Passivhaus standards (© Architype)



The LETI Climate Emergency Design Guide provides guidance on non-domestic buildings

Retrofit

Putting our existing homes on track towards Net Zero is a challenge but it can be done. This section explains how. The list of subjects it covers can be found on the following page.

Why? Key reasons and benefits of a low carbon retrofit

Existing buildings are the real challenge

England currently has some 25 million homes. All of those will have to have some form of retrofit by 2050 while, in that time, we will have only built another six million homes. This means that 80% of the homes that will be present in 2050 have already been built. If we are to successfully decarbonise housing, retrofitting is where the real challenge lies: we need to increase their energy efficiency, change their gas or oil heating system for a low carbon heat system (e.g. heat pump) and generate more renewable energy on their roofs.

Reducing fuel bills alongside carbon emissions

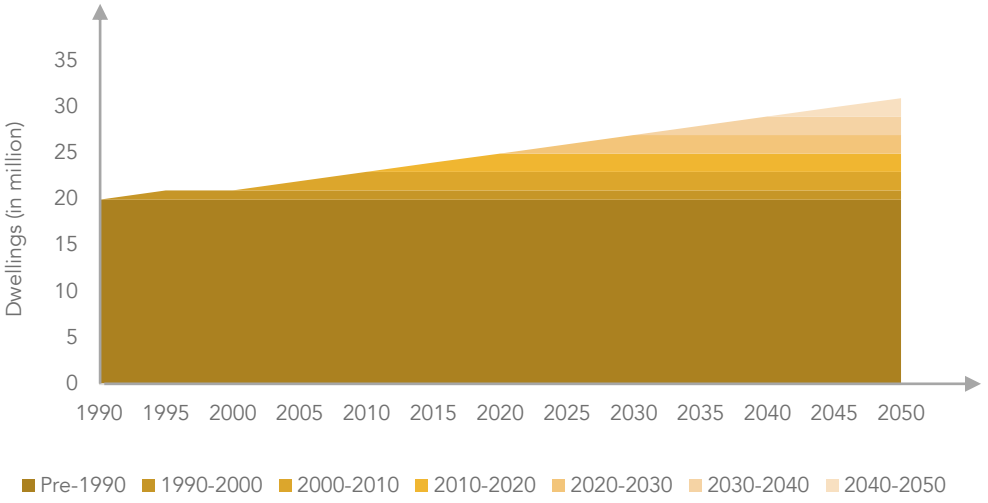
Whilst decarbonising homes is important to mitigate climate change, it is not the only reason to retrofit. In 2018, one in ten households in England were considered to be in fuel poverty. There is, unsurprisingly, a strong correlation between inefficient homes and fuel poverty with 88% of all fuel poor households living in properties with a Band D EPC or below. We can deliver lower bills as well as lower carbon emissions[1].

Health and wellbeing

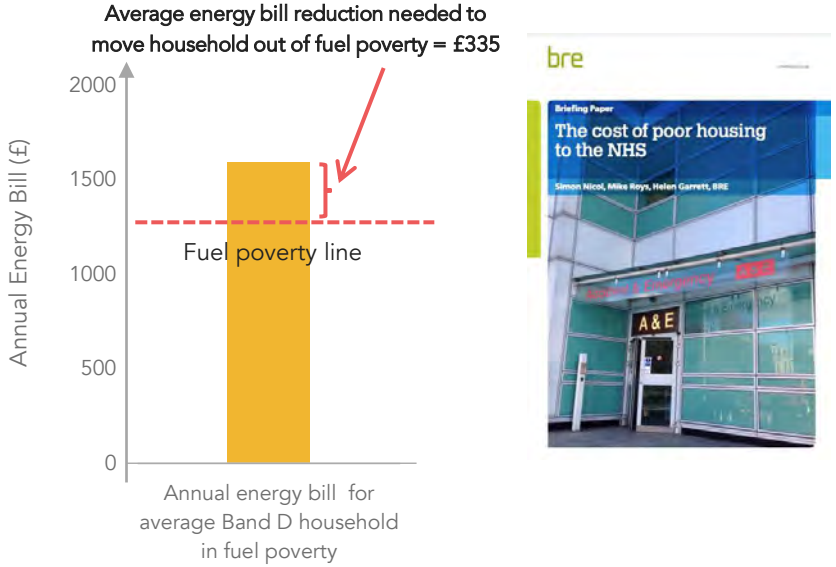
Improving the energy efficiency of a home is also likely to increase thermal comfort (both in summer and in winter) and improve indoor air quality through better ventilation. This will have a positive impact on everybody, but especially small children, the elderly and those with respiratory conditions. The International Energy Agency (IEA) and the OECD suggest health improvements might account for 75% of the overall value of improving the energy efficiency of buildings [2].

[1] The average Band D annual energy bill is £1600 and the average reduction needed to bring these households out of fuel poverty is £335

[2] Separately, the BRE have estimated that poor quality housing costs the NHS £1.4 billion in avoidable treatments.



England Housing Stock – 1990 to 2050 (Millions of dwellings)



Fuel poverty, health and wellbeing are all positive benefits of retrofit (Source: BRE)

Energy targets and Key Performance Indicators (KPIs) for retrofit

Setting the right brief and targets is key

To achieve the most energy efficient outcome it is important that the brief and targets reflect this ambition from the start. A strong brief provides tangible guidance on how targets can be achieved. Best practice KPIs for retrofit housing are listed in the adjacent table and all KPIs must be met for a home to be Net Zero carbon.

Getting the right team

The success of the retrofit approach relies on the coordination of a shared vision. Therefore getting the right team on board at the right time is critical. The early appointment of an energy consultant with specialism in ultra low energy design and retrofit is recommended. Workshops at briefing stage can be used to establish the long term retrofit plan and ensure the wider consultant team are clear on the targets and objectives.

Consider energy modelling

Analysis of the design through energy modelling will ensure that the KPIs are met in practice. This involves the early appointment of an energy or retrofit consultant to steer the design from concept stage and carry out modelling using accurate tools such as the Passivhaus Planning Package (PHPP).

Without energy modelling

Using energy modelling is always the recommended route to ensure accuracy, however it is possible to target best practice by setting the right specification and design requirements as part of the project brief. Refer to the 'How it all comes together' for retrofit of a terrace house (including the case of a terrace house in a conservation area). The LETI Retrofit Guide can also be used for further guidance (www.leti.london).

KPIs Retrofit housing	
Ultra low energy homes	Space heating demand 50 kWh/m²/yr *on average (range of 20-120 kWh/m²/yr)
Energy use and efficient heating	Energy Use Intensity 50 kWh/m²/yr *on average
Renewable energy	Electricity generation intensity 120 kWh/m²$_{fp}$/yr m²$_{fp}$: m² building footprint

PAS 2035
Retrofit guidance (see next page)

TM59
Overheating modelling for compliance

AECB
Good practice water standard

KPIs in-use
Collect data for the first 5 years

PAS 2035 guidance should be followed on publicly funded retrofit projects.

The ‘whole house’ approach and PAS 2035

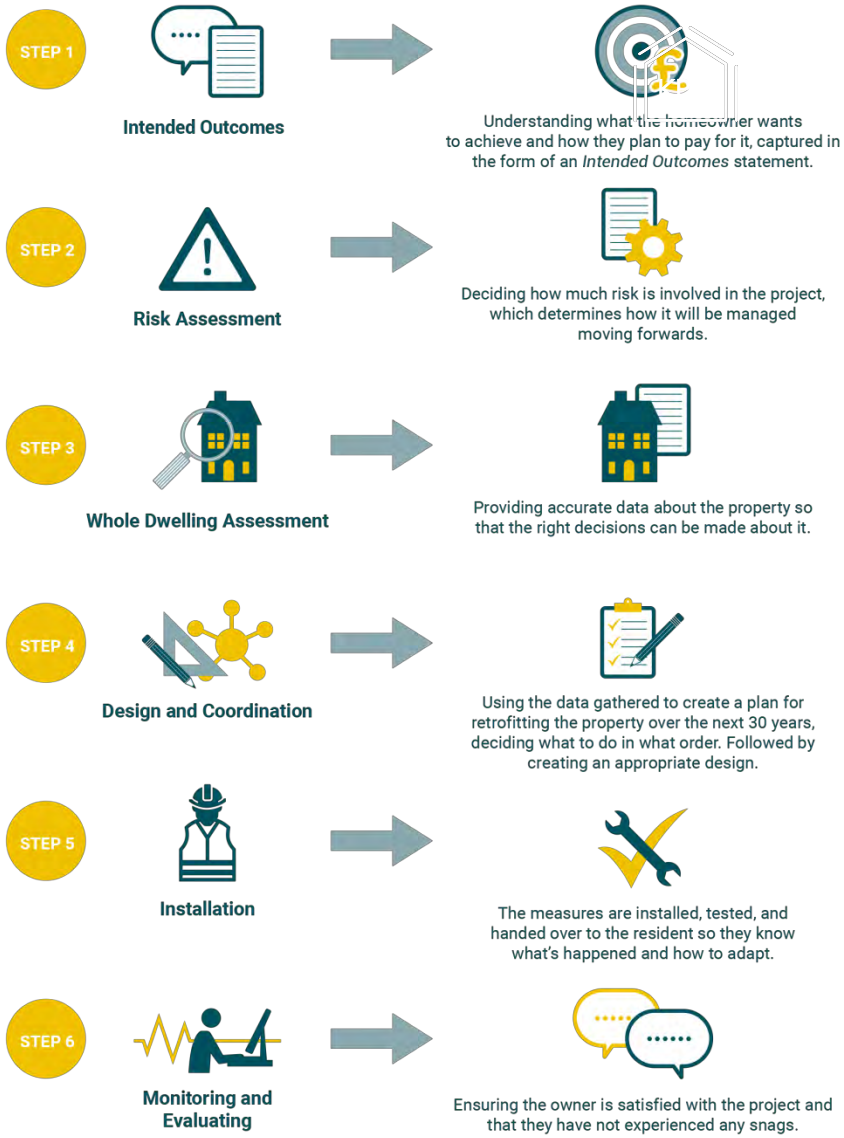
The importance of a ‘whole house’ approach

Successful retrofit relies on a structured process including adequate assessment, design, installation and monitoring to feed back into future work. These principles as well as the idea of whole house thinking and the role of retrofit coordinators have fed into the creation of PAS (Publicly Available Specification) 2035 the UK’s first retrofit standard. This helps to deliver quality and manage risks associated with retrofit. It aims to ensure clients and homeowners get value for their investment. PAS 2035 follows two core principles:

1. A **‘fabric first’** approach to reduce the heat demand of a building as much as possible and to ensure newly airtight homes are well ventilated and avoid issues with damp and humidity.
2. A ‘**whole house approach to retrofit’** to ensure retrofit plans for homes consider improvements to the fabric, services and renewable energy generation in a coherent way to minimise both risks and carbon emissions.

Who is a Retrofit Coordinator?

PAS 2035 requires an accredited Retrofit Coordinator to be appointed who will take responsibility for demonstrating compliance with the PAS 2035 standard. This is a relatively new role and different projects require input from different retrofit specialist depending on the risk category. The Retrofit Coordinator identifies whether the project falls into a low, medium or high-risk category and advises on appropriate steps to minimise risk. For more information, please refer here.



PAS 2035 recommends 6 steps to follow on a quality assured retrofit project

Changing a home's carbon dioxide pathway

How does a home produce carbon?

The vast majority (85%) of homes in the UK get their heating and hot water from a gas boiler and many other homes use other fossil fuels (e.g. oil). All the other energy uses in the home are drawn from the electricity grid. The emissions from the gas boiler are emitted on-site whilst the emissions associated with electricity use are emitted in a power station. Ten years ago, electricity was about 2.5 times more carbon intensive than gas, but things have changed a lot since then.

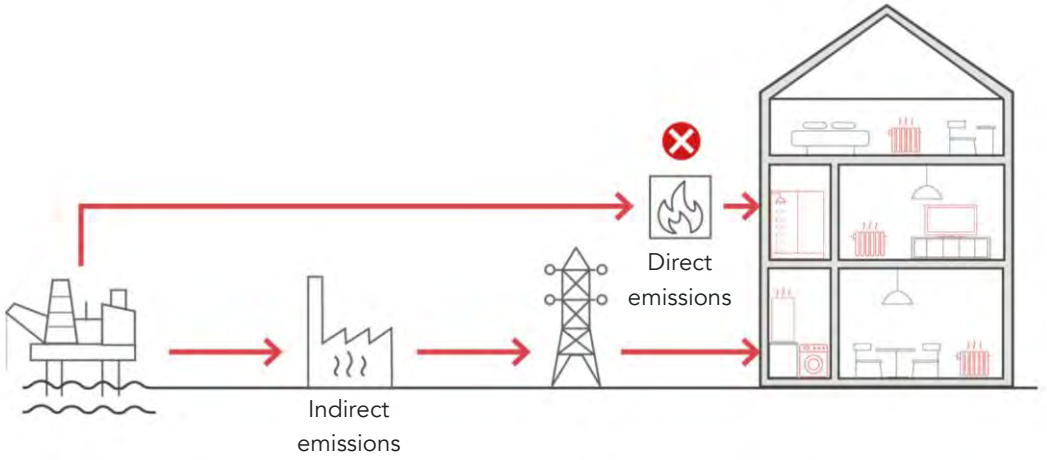
What has changed?

Over the past ten years, coal-fired power stations have been retired and the amount of renewable energy that feeds into our electricity grid has increased significantly. This means that the carbon intensity of our electricity has now dropped and is now about 30% lower than gas. As we add more renewables to our grid in the coming years, this will continue to drop until we approach a zero carbon grid.

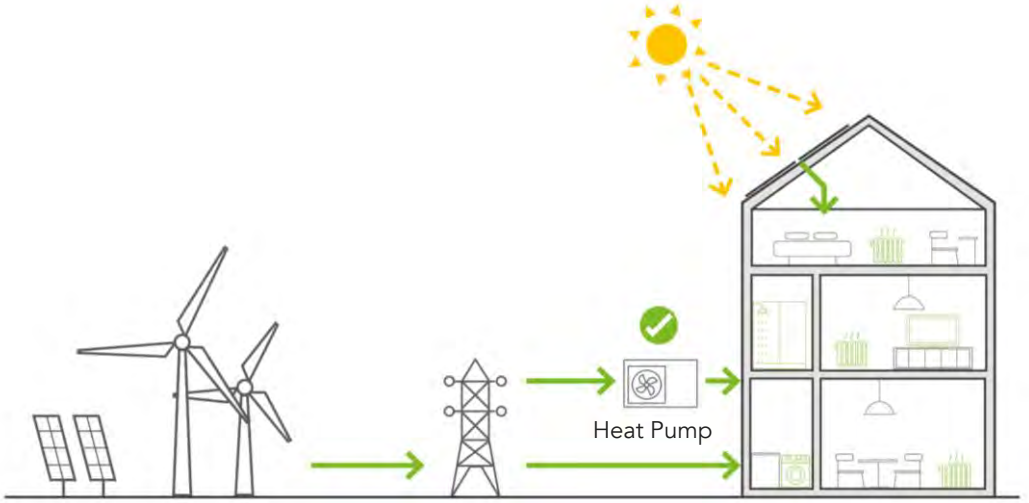
In contrast, a gas boiler installed today, will continue to emit carbon at the same rate until it is decommissioned – which could be another 25 years. This means that it has become a priority to move our homes away from gas to an electric-based system for heating and hot water.

Where do heat pumps fit?

Heat pumps will be discussed in more detail later, but they offer an excellent way of transitioning to electricity whilst reducing the load on the grid as they extract additional energy from the surrounding air or ground. Both the Government and the UK Climate Change Committee agree that they will form a major part of our future heating systems.



How most homes use energy now



How most homes should use energy now and in the future

Mapping to journey towards Net Zero

Each house or flat is different. They will have a different starting and final positions on the adjacent 'Retrofit Map' but ultimately, by 2050 (or earlier) all homes must be moved to one of the green squares.

The adjacent **Retrofit Map** could also be used to identify the buildings which should be most urgently retrofitted (in red) as they will be consuming most of the carbon budgets. Other factors (e.g. maintenance schedules, replacement opportunities, resident's appetite) may also influence the prioritisation.

Use of fossil fuels
Not compatible with Net Zero.
The heating system must be changed.

Low carbon heat but risk of high energy costs
A change of heating system may not be required but fabric, ventilation and system should be improved

Low carbon heat and sufficient level of energy efficiency
Compatible with Net Zero

High carbon → HEAT DECARBONISATION → Low carbon

FABRIC AND VENTILATION	Individual or communal gas boiler	Direct electrical heating	Low carbon heat network[1]	Heat pump system[2]
Heating demand <40 kWh/m².yr				
Heating demand <100 kWh/m².yr				
Heating demand <150 kWh/m².yr				
Heating demand >150 kWh/m².yr				

Low energy ↑ High energy

[1] A heat network would qualify as 'low carbon heat network' for the purpose of this Retrofit Map only if it would have a lower carbon content of heat (per kWh delivered) than direct electric heating. Any system using fossil fuels and/or with high distribution losses is unlikely to qualify.

[2] Could be an individual or building level heat pump with low distribution losses.

A long term whole house renovation plan for a phased retrofit

An ambitious objective

The objective of a retrofit project should be to achieve Net Zero carbon by 2050 (or earlier). This means that:

- The home's energy efficiency is improved
- A low carbon heating system is installed
- Renewable energy is installed on-site
- The home is made smart ready

A whole house renovation plan is a useful tool to prepare and provides a pragmatic and coherent way to deliver this ambition.

Phasing improvements as part of coherent whole house plan

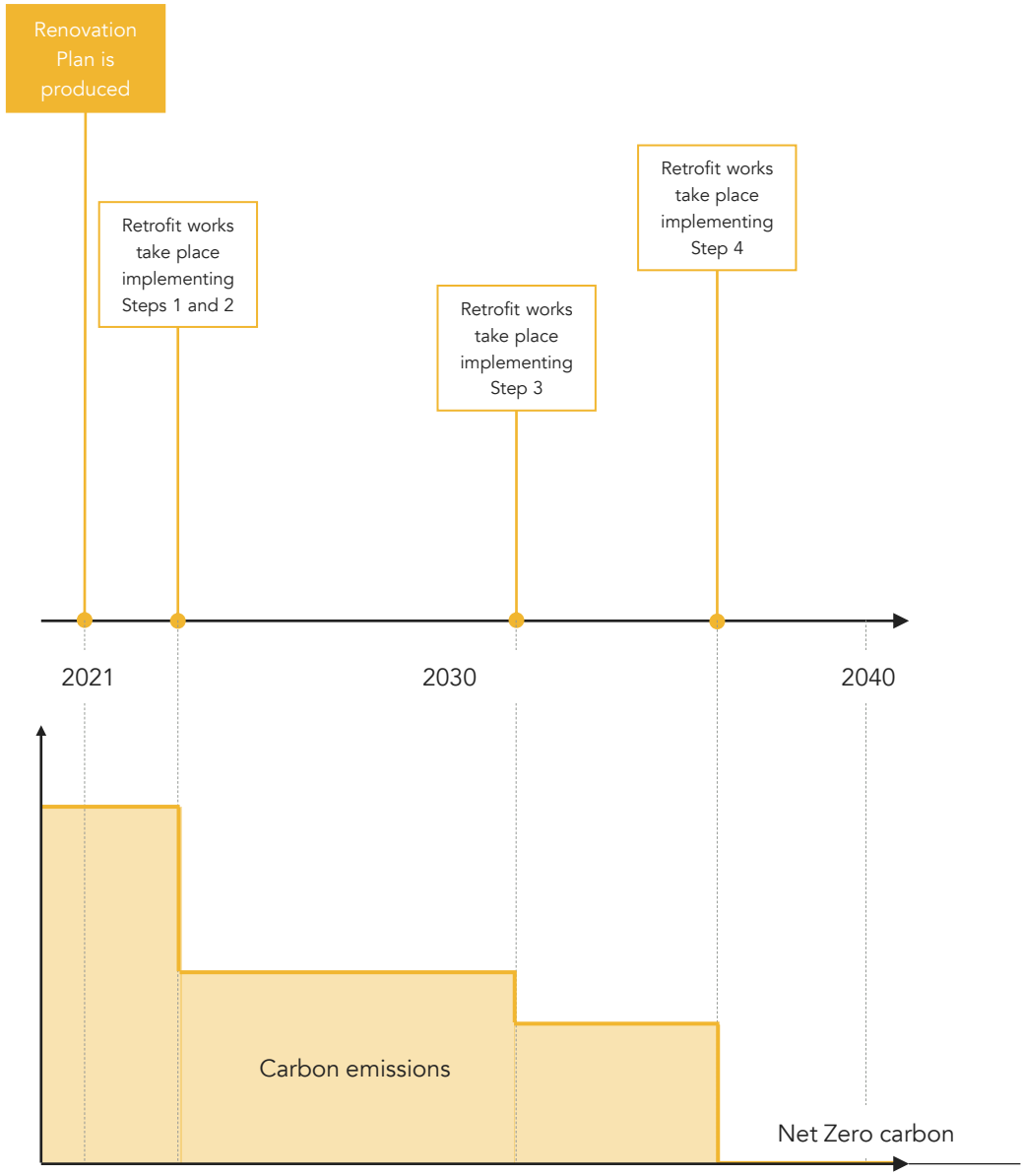
It may not be possible to implement all retrofit measures at once, but it is important to plan ahead so that packages of work are coherent and complementary. The preparation of a whole house plan is recommended to help in that planning.

This page shows how the measures can form part of a strategy for improvements. It would help landlord and residents to progressively save carbon and energy costs and avoid undertaking measures that conflict with planned future improvements.

A digital logbook

Alongside the whole house renovation plan, a building digital logbook can be developed to gather and retain all relevant information about the building.

Together, they form the **Building Renovation Passport**.



Note: the expected decarbonisation of the grid is not represented for simplicity but will also contribute to the reduction of carbon emissions over time.

Go to section…

Key retrofit risks and how to mitigate them

It's all about moisture …

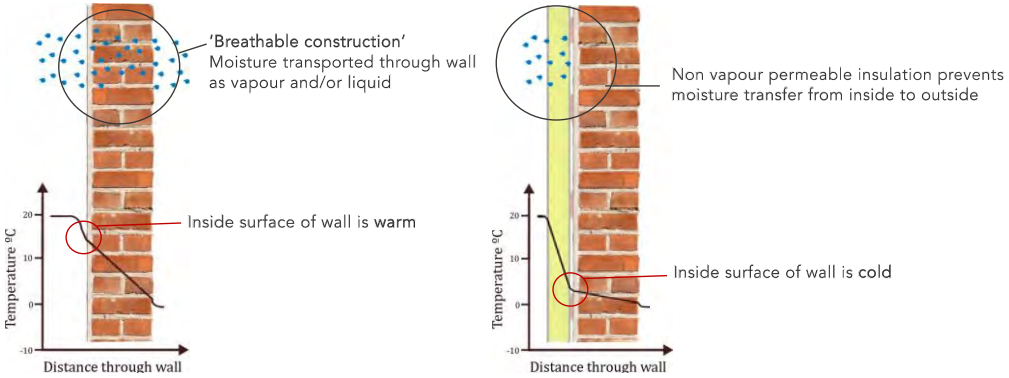
Our homes need to remain structurally sound, free from damp, mould and rot. Regrettably, many existing homes already suffer from excessive cold, damp, mould and condensation. A poorly planned and executed retrofit could actually make this worse. It is very important to understand this risk to mitigate and avoid it.

It may not be obvious, but our homes are constantly dealing with moisture. They are keeping out the rain and stopping the damp rising up from the ground. They are also dealing with the significant amounts of moisture that we generate inside the home from cooking, washing and breathing. Finally, if the building fabric does somehow get wet, they are designed to ensure that it will dry out without long-term damage. Interfere with any of these mechanisms, and we could end up doing damage to the health of both the building and its occupants.

Clear principles can address this risk

The risks of retrofit are well understood and can be overcome with sensible design and well-executed construction. Some key rules are:

- **No insulation without ventilation**. As you add insulation you are also likely to increase airtightness. This means less air moving through the building. You can counter this with opening windows and extract fans, but ideally by fitting a whole-house ventilation system like Mechanical Ventilation with Heat Recovery (MVHR).
- **External insulation is best**. Internal insulation means your external walls become cold and there is therefore a risk of condensation if the warm internal air reaches a cold surface. So, external insulation is preferred, but if internal insulation cannot be avoided, vapour open insulation (such as wood fibre) should be used. It is chemically fixed to the inside surface thus reducing the risk of condensation.



The risk of condensation with internal insulation

Installation of wood fibre insulation boards internally
(Sources Back to Earth & ASBP)

What about heritage buildings and conservation areas?

Low carbon retrofit of heritage and traditional construction buildings in conservation areas is necessary and possible. There are a growing number of examples which show it can be done, and the PAS retrofit framework provides a suitable methodology.

Environmental and heritage conservation can go hand in hand

Heritage conservation is often given as an excuse to not improve energy efficiency and reduce carbon emissions. Proposals for those measures are sometimes refused by Local Planning Authorities particularly where they are not well thought through and do not form part of a whole building approach and therefore could cause damage to the structure of the building.

However, in addition to offering significant potential for carbon reductions, well-planned retrofit programmes can also contribute to conservation by incorporating maintenance and repair, and offering a new lease of life to buildings. They limit the risk of under-heating by occupants worried about energy bills, and associated risks of fabric degradation. By being more comfortable, buildings are also more likely to remain valuable and well looked after in the future.

Identifying relevant solutions for the context

Upgrading existing windows, and/or installing replacement double/triple glazed windows (subject to planning officer's support) can reduce heat loss by up to 40%. Recent advances in windows technology such as evacuated glazing offer the possibility of recreating traditional windows forms but with only a fraction of the heat loss. This technique can in some cases be applied to listed buildings.

Emerging products such as insulating plasters also offer the opportunity to insulate walls in a sensitive manner.

There is a growing library of resources for responsible retrofit of traditional and historic buildings, including the above Sustainable Traditional Buildings Alliance (STBA) and Historic England guidance

Recent examples of exemplar retrofits with heritage considerations: Grade I listed Trinity Student Halls in Cambridge (left, source: Max Fordham), and Grade II early Victorian home in Clapham, London (right, source: Arboreal). Both include the application of internal insulation, with attention to moisture movement and monitoring of interstitial moisture level.

An extension should trigger the improvement of the home (especially low carbon heat)

Grasping the opportunity

When considering the lifetime of a house, there are not many times when major improvements can be made. An extension is a fantastic opportunity to make a significant step towards Net Zero carbon and not locking in poor/high carbon decisions.

What to consider

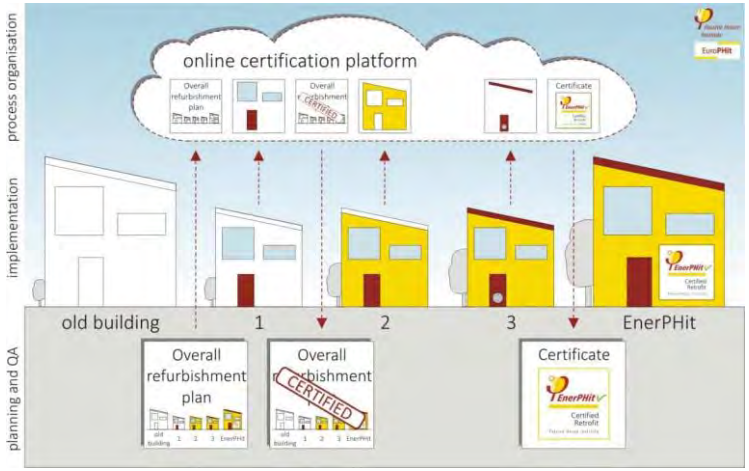
When considering the scope and costs of extending a home, the following opportunities should be considered:

1. Upgrading the heating system, and replacing the gas boiler with a heat pump.
2. Replacing existing windows with double or triple glazed windows
3. Upgrading the existing external fabric of the existing building (including both insulation and airtightness).
4. Installing Mechanical Ventilation with Heat Recovery (MVHR)
5. Installing solar PV panels to generate electricity

Staged retrofit – piece by piece

It is possible to undertake a staged retrofit when extending a home. A very useful resource and robust methodology is the EnerPHit Retrofit Plan. This scheme helps create a plan for taking a staged retrofit process, where the measures to improve the building fabric are put to a timeline. This allows the extension to be built and improvements to be made over time, and not just in a single phase. This can be an attractive and practical approach as often the capital costs of undertaking an extension and undertaking a major refurbishment all at once may not be affordable.

EnerPHit retrofit project with extension (Source: Passivhaus Plus)



EnerPHit staged retrofit improvement plan process (Source: PHI)

What are the low carbon heating options?

Heat pumps are the best option

The electricity grid has decarbonised and will continue to decarbonise, thus most likely low carbon heat source is using electricity. This is done most efficiently, and has lower running costs when using heat pumps. There are various types of systems available including, air-to-air and air-to-water heat pumps, ground source heat pumps, exhaust air heat pumps, heat pumps integrated into a domestic hot water store, and shoebox water-to-water heat pumps connected to an ambient loop. Hot water storage is required when using heat pumps.

What other options are available?

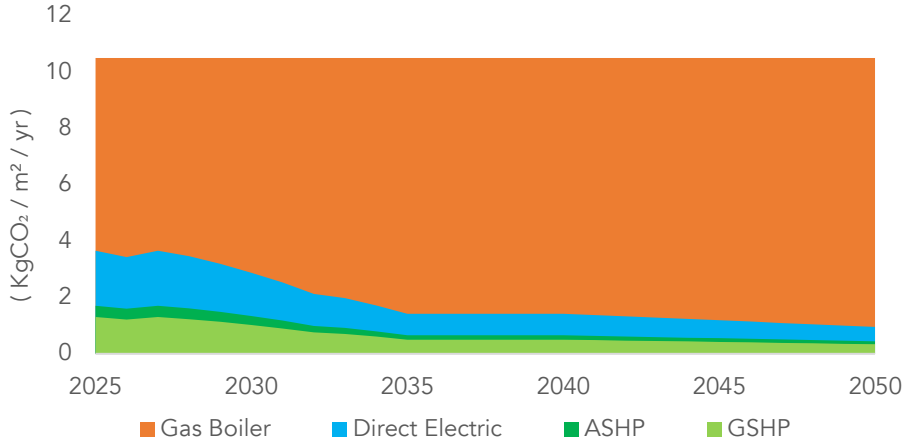
Direct electric heating, for example through panel radiators will become low carbon in the future, as the grid continues to decarbonise. However direct electric heating can lead to very high heating bills.

Hydrogen is very unlikely to be a solution for the majority of homes. 'Green' hydrogen from renewable power electrolysis is truly zero emissions. However, the UK gas supply industry advocates 'Blue' hydrogen manufactured from methane with carbon capture of its high emissions using yet to be proven at scale carbon capture and storage technology. Thus it is yet to be proven that hydrogen at scale is in fact low carbon and of an acceptable price.

Using woodburning stoves causes problems with air quality and involves burning raw materials, which should be avoided.

Is my home ready for low carbon heat?

If your home does not have a reasonable level of energy efficiency, particularly if it is a large house, using a heat pump can be quite expensive. In those cases, it is recommended to improve the fabric and airtightness, potentially over time.



This graph compares carbon emission associated with various heating systems over for a typical home. Emissions from a gas boiler stay constant, whereas emissions from direct electric systems and heat pumps reduce over time due to grid decarbonisation. Heat pumps have lower emissions than direct electric systems purely because they are more efficient.

Best ↓ Worst

System	Carbon Emission Reduction	Running Cost	Capital Cost	Air Quality Neutral	Ease of Use & Maintenance
Ground source heat pump	✓✓	✓✓	✗	✓	✓
Air source heat pump	✓	✓	~	✓	✓
Direct electricity	~	~	~	✓	
Biomass/ wood burning stove	~	~	~	✗	✗
Hydrogen	✗	?	?	✓	✓

The table compares various low carbon heating options across different criteria

Key	✓✓ Very Good	✓ Good	~ Neutral / Dependant	? Unknown	✗ Bad

Go to section…

Which heat pump is best for me?

There are various types of heat pump options available for retrofitted homes. This page outlines which heat pumps are available and which to choose.

Most homes with a heat demand below 100kWh/m^2.year will be suitable for a heat pump, unless there is not sufficient space. At the higher end of this criteria larger radiator sizes or underfloor heating may be required.

1 Which heat pumps are the best for retrofitted homes?

- Monoblock or split (air source) heat pump, generating heating and hot water
- A ground source heating pump system, generating heating and hot water
- Individual heat pump connected to an ambient loop

Reasons why these heat pumps might not be suitable:

- **Available space:** These heat pumps require space for indoor and/or outdoor units
- **Ground conditions:** Some ground conditions are not suitable for ground source heat pumps
- **Size of development**: an ambient loop is only really suitable when there are more than 30 homes

If these systems do not work ↓

2 Is the space heating demand < 100kWh/m^2.yr

No → It is recommended to retrofit the home such that the heat demand is as low as possible, as this reduces carbon emissions and fuel bills.

If the home cannot be retrofitted to below 100 kWh/m^2.yr heat demand then it is still recommended to install a heat pump, but assess the impact on energy costs.

Yes ↓

3 Which are the next best heat pumps?

- A heat pump integrated into a hot water store (i.e. hot water heat pump). Heating is delivered through direct electric panel radiators
- An exhaust air heat pump with direct electric panel radiators are needed for peaks*

Reasons why these heat pumps might not be suitable

- **Available space:** These heat pumps require space for a hot water store
- **Ducting:** A heat pump integrated into a hot water store required ducting to the outside, in some homes there might not be space for this
- **Ventilation:** an exhaust air heat pump requires integration into an MVHR unit, MVHRs are highly recommended

If these systems do not work ↓

4 Is the space heating demand < 40kWh/m^2.yr?

No → It is recommended to retrofit the home such that the heat demand is as low as possible, as this reduces carbon emissions and fuel bills.

If there is not sufficient space to install a heat pump, then consider direct electric heating and hot water.

Yes ↓

5 Consider direct electric heating and hot water

*An exhaust air heat pump (compact unit) combined a heat pump and a MVHR. Some products can only meet the heat demand in smaller dwellings and/or this with a space heating <15kWh/m^2.year,

Why windows should be upgraded

Windows can lose more than ten times more heat compared to a well insulated external wall. Unless the current windows have been installed recently, it is very important to ensure that windows are replaced with high performing triple glazed windows (with a whole unit U-value calculated (U_w value) of less than 1.0 W/m^{2}K).

Detailing the window replacement

Where possible, the window should be replaced in line with the insulation layer of the external wall to continue the thermal line of the dwelling. The connection of the window to the external wall needs to be carefully considered as this is a weak spot thermally. It needs to be designed so that the risk of condensation between the external wall and window is reduced. A specialist consultant who can undertake thermal bridge modelling may need to consulted for project specific guidance. The use of low conductivity cavity closers and products like compacfoam can be a good way to reduce thermal bridging, and reduce the risk of condensation.

Airtightness

When installing the windows, care should be given to the junction between the window frame and the airtightness layer of the external wall. High performance airtightness tape should be used to limit infiltration as the connection between windows and external walls can be leaky if not properly installed.

Exceptions

Replacement windows may not always be appropriate in the context of a listed building, or some older buildings in conservation areas, and other methods of improving the energy efficiency of the existing windows may need to be considered as part of a more holistic 'whole house approach' (e.g. draught proofing or secondary glazing).

Photo of triple glazed aluclad timber window (Source: Internorm)

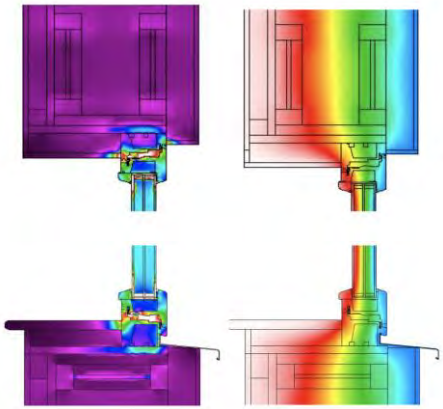


Photo of thermal bridge calculation of window install (Source: Warm)

Replacement triple glazed windows (Source: Internorm)

Photo of window install in Enerphit retrofit (Source: Passive House Plus)

Insulating walls

Insulating externally or internally?

From a heat loss perspective, it is better to externally insulate as this allows the insulation to wrap around the building continuously and avoids the need to address weak points and junctions e.g. around floor joists. However, it will mostly come down to what is practical on the specific site: how much space there is available; the aesthetics preferences; whether the building has conservation or planning constraints that prevent external insulation; the level of disruption the installation will have to occupants; and the relative installation cost.

External insulation

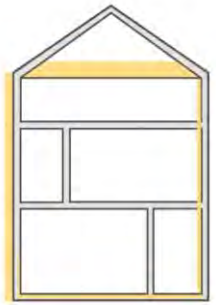
External wall insulation is a good solution. It is very effective thermally, does not reduce internal space and generally enables residents to stay in the property when insulation is being fitted. The external appearance of a building will be affected, and roof eaves may require extending. Insulation can be easily covered in render but brick slips, pebbledash and cladding are also possible.

Internal insulation

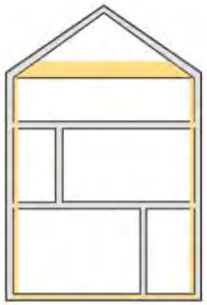
Use breathable materials internally e.g. wood fibre insulation, hemp lime insulation. Avoid using non-breathable materials internally e.g. rigid insulation. Even though this can achieve a good thermal performance and is often cheaper, it can increase the condensation risk and make detailing around junctions more complicated. Consider the combustibility of insulation, natural products are likely to be combustible but can be used safely in the right application. Where space is limited internally consider using thin products such as aerogel insulation. Consider installing service voids for electrics to run outside of the insulation line.

External Insulation Approach

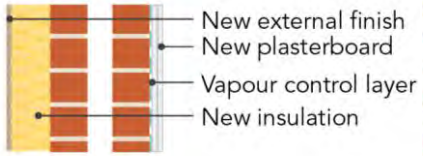
Hybrid Approach



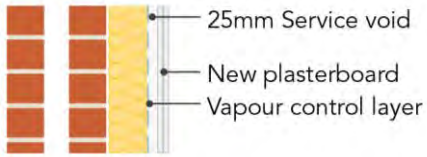
Internal Insulation Approach



In some circumstances, it may be beneficial to consider a hybrid approach e.g. internal insulation at the front to retain the architectural features of the front façade and external insulation at the rear. This maximises the insulation gains of using external insulation where it has less of a visual impact.

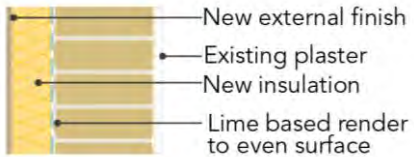


Externally insulated Brick Cavity

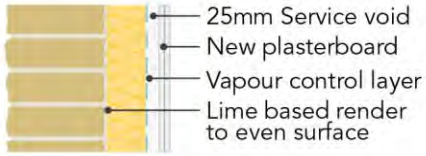


Internally insulated Brick Cavity

N.B. If considering cavity fill insulation ensures measures have been made to prevent condensation



Externally insulated Stone Wall



Internally insulated Stone Wall

Insulating floors and roofs

Consider floor-to-ceiling heights

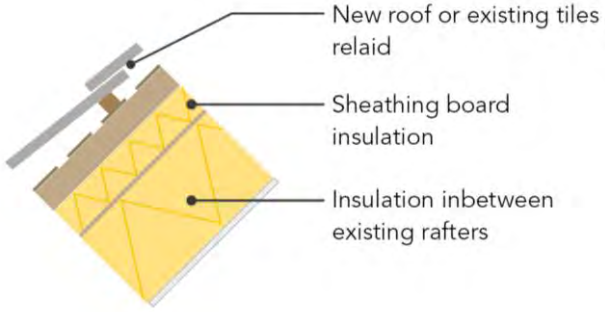
When insulating floors or ceilings be sure to check the floor to ceiling height. Insulating floors may require raising the floor level, so ensure you have considered the impacts e.g. steps at the entrances, door heights and consistent staircases levels.

Extending eaves over external wall insulation

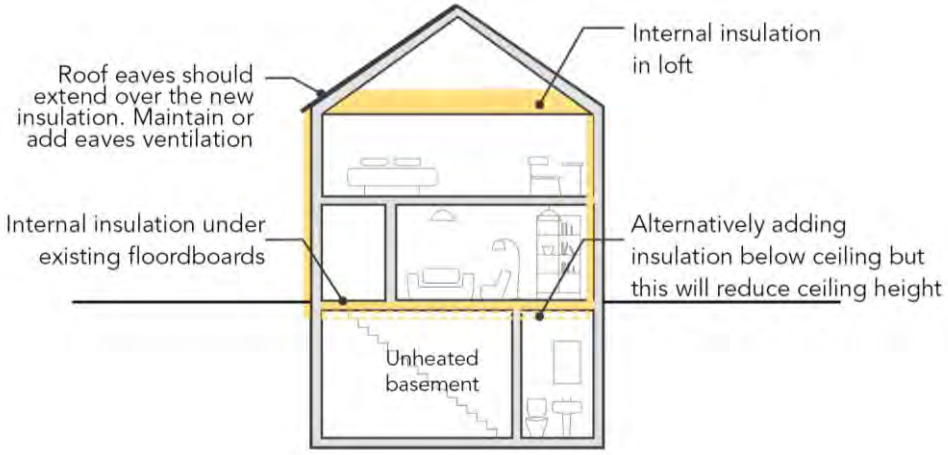
Where external wall insulation meets the roof consider extending eaves to cover the additional wall thickness. Also be sure to maintain or add ventilation at the eaves.

Insulating roofs

If you have an unheated attic space the simplest approach is to insulate the floor in the loft. Ideally relocate existing water services and tanks in the roof void or insulate them if not possible. If you require a heated and habitable loft, add insulation between rafters and apply insulated sheathing board over the rafters as shown in rafter detail below. Plasterboard can be fixed to the underside of the insulation. Consider fabric improvements in conjunction with any loft extension works.



Rafter insulation detail



Introduction to thermal bridges

Thermal bridges

A thermal bridge, or cold bridge, is a piece of material through which heat flows easily, relative to adjacent materials. For example, a concrete lintel that interrupts the wall insulation layer would be considered a thermal bridge. Thermal bridges should be avoided as they increase heat loss, and can cause cold spots that lead to condensation and decrease comfort for home occupants.

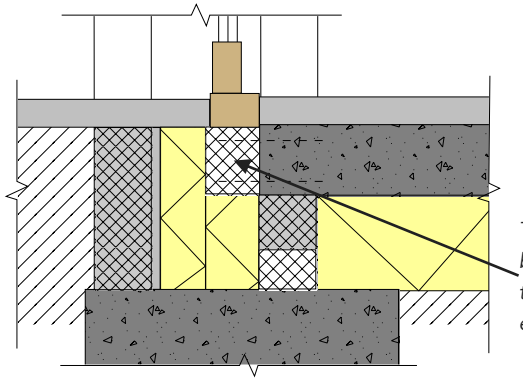
Identifying thermal bridges

A good approach to retrofit is to sketch out a cross section drawing of the building. Clearly identify materials that keep heat in, such as insulation, doors, and windows. Ideally, these should all connect together without insulation depth reducing by more than a third. Different materials should be butt jointed, or overlap, ideally for a distance equivalent to the thickness of the insulating element.

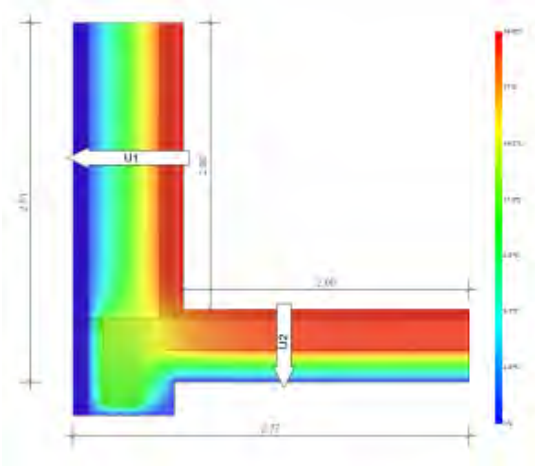
Tackling thermal bridges

There are many off-the shelf products available to avoid thermal bridging. Learn about these and use them where possible. Examples include thermally broken lintels, foam glass blocks, high density EPS foam, and specialist structural thermal breaks that can be cast into concrete, or used to fasten steelwork together.

In retrofit, there will be thermal bridges that cannot be avoided. In these cases, aim to increase the distance that heat must flow to escape the structure. For example, an insulation downstand or skirt could be applied around the external wall to ground floor junction of a building to reduce heat flow. Consider using thin pieces of higher performing insulation such as phenolic board or aerogel where depth is constrained.



Sketch out key junctions and ensure there is a continuous line of insulation that runs around the building. Try to ensure the insulation depth does not reduce by more than a third around any junction, and ensure window and door frames are in line with insulation.



Consider commissioning thermal bridge modelling for particularly challenging junctions to inform your strategy. Small changes to the position and type of material used in construction can have a big affect on the heat flow, a model will help to show this.

Junctions

Consider junctions carefully

Junctions which pose a weak point for heat loss, i.e. a thermal bridge, should be considered on a case by case basis. Key examples of such junctions are outlined below. Special care should taken to reduce the condensation risk posed at each junction. We strongly recommend engaging an architect or consultant who is able to produce a risk assessment and help design out condensation risk.

1 Roof eaves with external wall insulation

The space between the external wall insulation and roof insulation is a weak point for heat loss. This can be compensated by providing a strip of internal insulation at ceiling level.

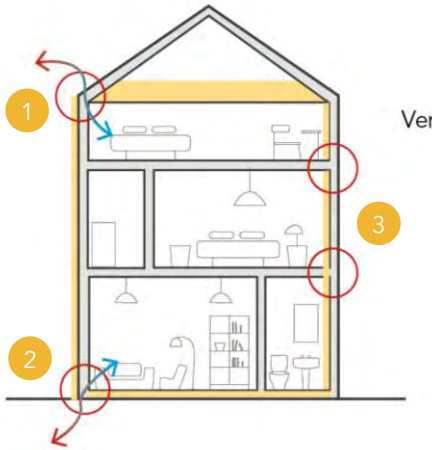
2 Foot of the façade with external wall insulation

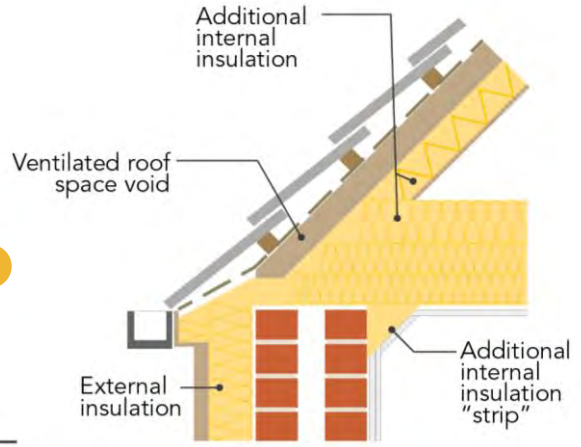
Avoid creating weak points for heat loss at the foot of the façade between external insulation and ground floor. Insulating externally down the wall below ground level as far as possible and provide some internal wall insulation up to counter top level.

3 Joist ends with internal wall insulation

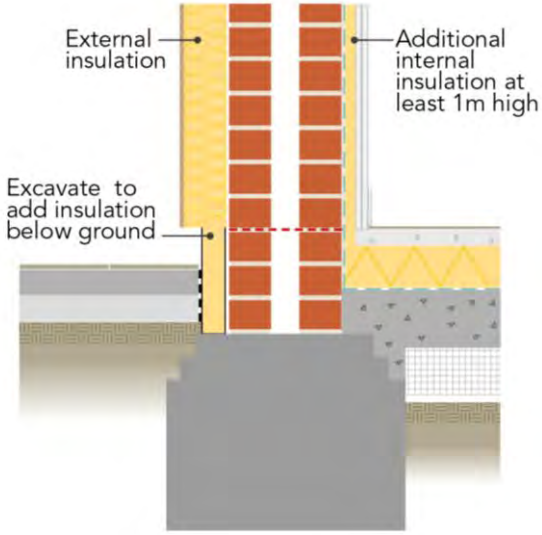
When applying internal insulation it is important to protect joist ends against thermal bridging and condensation risk:

- The most effective approach is to cut and rehang joists away from the external wall e.g. support them on hangers or by a beam between party walls. This allows for a narrow cavity of insulation to be inserted between the façade and end of joist.
- When insulating behind the joists is not possible, consider hanging the joists or wrapping the breather membrane around the end of the joist to prevent the build up of condensation.



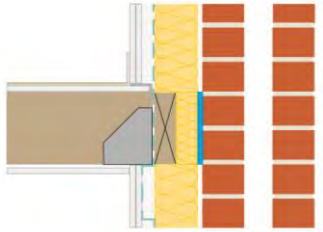


Detail for roof eaves and 'internal strip of insulation'

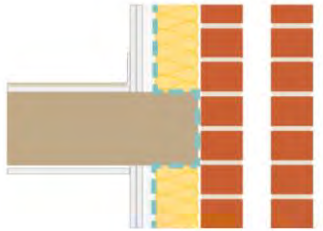


Measures to avoid thermal bridge at the foot of the façade

Source: Levitt Bernstein



To avoid thermal bridge + condensation cut and rehang joist away from wall



To avoid condensation risk wrap joist (or add hanger)

Airtightness for retrofit

The importance of airtightness

The airtightness of existing homes varies hugely, however it is recommended that retrofit work targets a value of between 0.5 and 3$m^3/h/m^2$, depending on the depth of retrofit and project limitations.

Start with a plan, investigate, then update the plan

Building airtight starts with a well thought through airtightness and ventilation strategy. Existing buildings conceal many secrets however, so expect to update the plan once you start stripping out the building. A key consideration in retrofit is managing moisture risk and minimising risk of warm humid indoor air coming into contact with cold surfaces.

Use the right products

Retrofits will use similar products to new build projects. Consider ordering a range of tapes, primers, membranes and parge coats in advance to test on parts of the building. It may be necessary to combine traditional building practices with modern airtightness products. Consider this carefully and contact manufacturers for advice if necessary.

Stick to the plan on site

Retrofit can be a bit chaotic, so ensuring the airtightness strategy is implemented properly is even more important than for new build. Expect setbacks and be ready to adapt your approach as necessary.

Test, then test again

Plan for at least two air tests. The first test should be completed as soon as the building is weathertight and while joints between different components in the airtight layer are still accessible so leaks can be repaired if necessary.

Achieving airtightness is possible in retrofit, but it is often necessary to strip back to the basic structure and perform basic repair work before methodically applying airtightness products and principles. Always consider risk of moisture and condensation. (Source: Eightpans)

Applying airtightness tape to joist ends is a common measure required to achieve good airtightness in existing buildings. Large gaps may need filling with mortar first, and remember to apply a suitable primer. (Source: Ecomerchant)

Retrofitting a ventilation system

Why is it important?

Existing buildings in the UK are generally leaky and naturally ventilated, leading to discomfort and large energy demands. Insulation, airtightness and new windows are often considered important but they generally should not be done without the retrofit of a controlled ventilation system. A mechanical ventilation and heat recovery (MVHR) system is often the best solution.

Mechanical Ventilation with Heat Recovery

The most efficient way to provide ventilation, is through a MVHR system. The equipment circulates air in a dwelling using a small fan, whilst recovering the heat from inside so it is not lost.

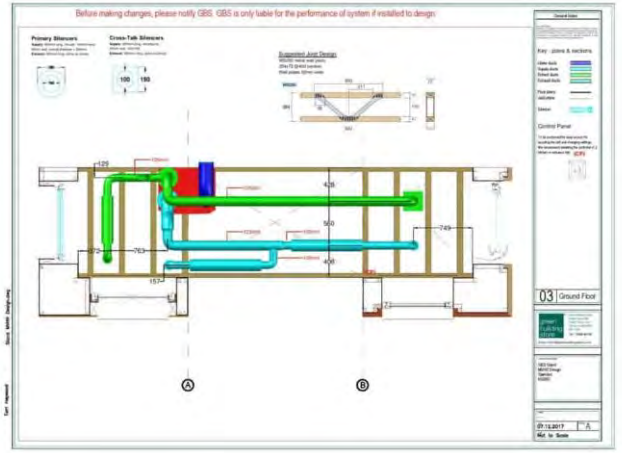
Designing and selecting the correct MVHR system

You will need a building services engineer and/or experienced subcontractor and/or a MVHR manufacturer/supplier to calculate the fresh air required, and design the MVHR system for your dwelling.

The MVHR unit should be sized and the system designed according to some specific requirements of the home and to achieve acoustic requirements. It is important to plan the space required for the MVHR unit and the associated ductwork and silencers. Rigid, insulated ductwork should be adopted where necessary. The MVHR unit should preferably be a Passivhaus Certified Unit.

Installing and commissioning the system

Historically the installation and commissioning of MVHR systems has been poor. To ensure the system works as planned, the system must be properly tested to ensure it is balanced, delivers the designed fresh air required and does not generate noise beyond what is expected.



MVHR system design for an existing dwelling (Source: Green building store)

Image of Zehnder MVHR unit being retrofitted into an existing house

(Source: Bow Tie Construction)

Flow rate measurement: image of MVHR system being commissioned

(Source: Fourwalls)

Water efficiency and domestic hot water

Reduce overall water consumption

Water efficiency is about reducing our use of mains water and the effect our homes have on water resources.

Reduce hot water to reduce energy use

In very low energy buildings, the energy required for hot water can exceed the amount of energy required for space heating. Therefore optimisation of hot water systems is essential to ensure energy use remains low.

What can you do?

Reduce flow rates

- The AECB water standards (opposite) provide clear guidance on sensible flow rates for showers and taps in low energy buildings.

Reduce distribution Losses

- All pipework must be insulated.

Insulate to minimise losses from hot water tanks

- The standby losses of hot water tanks are highly variable, and can have a significant impact on overall energy use. Target a hot water tank heat loss of less than 1 kWh/day equivalent to 0.75 W/K

Install waste water heat recovery systems in shower drains

- A simple technology that recovers heat from hot water as it is drained. Vertical systems can recover up to 60% of heat with more common horizontal ones recovering 25-40%.

Consider water recycling

- This is the process of treating waste water and reusing it, it can be used for large portions of potable water use.

Appliance / Fitting	AECB Good Practice Fittings Standard
Showers	6 to 8 l/min measured at installation. Mixer to have separate control of flow and temperature although this can be achieved with a single lever with 2 degrees of freedom (lift to increase flow, rotate to alter temperature). All mixers to have clear indication of hot and cold, and with hot tap or lever position to the left where relevant.
Basin taps	4 to 6 l/min measured at installation (per pillar tap or per mixer outlet). All mixers to have clear indication of hot and cold with hot tap or lever position to the left.
Kitchen sink taps	6 to 8 l/min measured at installation. All mixers to have clear indication of hot and cold with hot tap or lever position to the left.
WCs	≤ 6 l full flush when flushed with the water supply connected. All domestic installations to be dual flush. All valve-flush (as opposed to siphon mechanism). WCs to be fitted with an easily accessible, quarter turn isolating valve with a hand-operated lever. Where a valve-flush WC is installed, the Home User Guide must include information on testing for leaks and subsequent repair.
Baths	≤ 180 litres measured to the centre line of overflow without allowing for the displacement of a person. Note that some product catalogues subtract the volume of an average bather. A shower must also be available. If this is over the bath then it must be suitable for stand-up showering with a suitable screen or curtain.
Showers	6 to 8 l/min measured at installation. Mixer to have separate control of flow and temperature although this can be achieved with a single lever with 2 degrees of freedom (lift to increase flow, rotate to alter temperature). All mixers to have clear indication of hot and cold, and with hot tap or lever position to the left where relevant.

Refer to the full AECB document for more information.

Retrofitting solar PVs

Where to start

Contacting a local MCS certified solar installer is a great first step to retrofitting a solar Photovoltaic (PV) system. They can assess your property, provide information on solar panels and inverters, and provide a quotation indicating how much energy the system will generate. Quotations typically also include financial analysis such as annual savings and simple payback period. Prices can vary substantially between installers though, so obtain several quotes.

Planning work

Unless you live in a bungalow, scaffold will typically need to be erected to install solar panels. Consider whether this could provide opportunities to carry out other retrofit work such as wall insulation, replacing windows, or tackling a thermal bridge between your wall and roof insulation. Standard solar scaffolds may not include working decks or intermediate floors, so if you do plan to do other work discuss it with your installer.

Getting up and running

Once your system is installed, you will need to get registered for the Smart Export Guarantee to receive payments for exported solar energy. Check *Solar Energy UK's* league table to find an energy supplier offering a competitive rate. Most schemes require an MCS certificate from the solar PV installer and a smart meter or export meter that can record the amount of energy you are supplying to the electricity grid.

Over a million homes in the UK already have solar panels, many of which have been retrofitted. Notify your building's insurance provider if you are having solar panels fitted to ensure they are covered and your policy remains valid. (Source: Alamy Stock Photo)

Products and processes have been specifically developed to securely fit panels to existing roofs. Example shows a stainless steel roof hook being mounted to a slate roof. (Source: Schletter installation video)

Smart controls and demand response

Intuitive and flexible energy use

Demand response or energy flexibility refers to the ability of a system to reduce or increase energy consumption for a period of time in response to an external driver (e.g. energy price change, grid signal). Energy storage allows these systems to consume, retain and release energy as required in response to specific energy demands. Smart controls respond to these external drivers and demands to manage our systems.

Maximise renewables and stabilise the grid

These measures can help maximise the utilisation of on-site renewables and help stabilise demand on the grid. Moreover it will help to decarbonise the grid: when renewable electricity generation is low, demand response measures reduce the load on the grid, reducing the amount of peak gas plant that must be switched on to meet the grid demand.

Smart controls and demand response measures in the home (Source: SMA Solar UK)

What can you do?

Peak reduction

- Use passive measures and efficient systems to reduce heating, cooling and hot water peaks.

Active demand response measures

- These measures reduce the electricity consumption for a certain period.
- Install heating and cooling set point control with increased comfort bands, controlled with smart thermostats or home energy management systems.
- Integrate thermal storage of heat into communal or individuals system within a building.
- Reduce lighting ventilation and small power energy consumption.

Electricity generation and storage

- Use products that can generate electricity and feed into the grid, or power the building.
- Consider solar PV to water heat storage or battery storage.

Electric Vehicle (EV) charging

- It is generally accepted that there will be a large increase in electric vehicles, so it is essential to implement demand response to ensure grid stability.
- Charge EVs only when needed and allow the supplier to cut the charging short during peak times.
- Install 'Vehicle to Grid' technology which allows the battery of the EV to be used to supply the building during grid peak periods.

Behaviour change

- Raise awareness of how people use electricity and the impacts.
- Consider incentives to reduce peak demand.
- Encourage responsible occupancy.

Microgrids

- Consider being part of a small semi-isolated energy network, separate from the national grid.

Indicative costs of retrofit

How much does it cost to retrofit and what are the results?

Retrofit costs depend hugely on the baseline building's characteristics and condition. A rough guide for an average semi-detached home is £5-15k for a shallow retrofit which, if starting with a poor baseline, could save around 30% in carbon emissions, through to £45-55k for a deep retrofit which would include significantly improving the building fabric, changing the heating system to a heat pump and fitting roof mounted solar PVs. This level of retrofit could achieve an 80-90% reduction in carbon emissions – particularly in the future as the heat pump makes use of a lower carbon grid.

Seeing retrofit as an additional cost to maintenance?

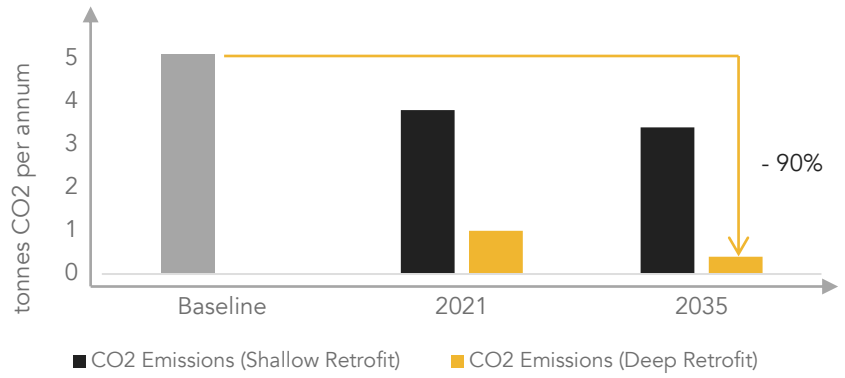
It's important to consider whether a measure is best undertaken as part of a planned or required maintenance activity. For example, re-rendering a wall would be an ideal time to apply external insulation and would mean the actual extra costs are just the insulation material and labour to secure the insulation to the wall.

And don't forget the co-benefits

Improved comfort, health and lower fuel bills are all valuable and important outcomes of retrofit. Prioritising measures using these different criteria is likely to produce a different order of priority for retrofit. For example, health and wellbeing is probably most improved by a Mechanical Ventilation with Heat Recovery (MVHR) system as this will dramatically improve indoor air quality and comfort. On the other hand, in most solid-walled dwellings, external wall insulation will offer the greatest net energy savings, and so the most significant reduction in fuel bills, despite being relatively expensive.

Measure	Shallow	Deep
Fit 100% low energy lighting	£ 20	£ 20
Increase hot water tank insulation by 50mm	£ 50	£ 50
Loft Insulation - add 400mm	£ 500	£ 500
Fit new time and temperature control on heating system	£ 150	£ 150
Improved draught proofing	£ 150	
100% draught proofing - improve airtightness		£ 2,000
Cavity Wall Insulation - 50mm	£ 600	£ 600
Floor Insulation - between & below suspended timber		£ 1,500
Insulate all heating and hot water pipework		£ 500
Fit Mechanical Ventilation and Heat Recovery (MVHR)		£ 7,000
Main Heating - High Efficiency Condensing Gas Boiler	£ 3,800	
Main Heating - Air Source Heat Pump and new HW tank		£ 9,000
Half Glazed Doors - Double Glazed (16mm argon)	£ 1,500	
Half Glazed Doors - Triple Glazed, High Performance		£ 2,000
External Wall Insulation - 160mm Expanded Polystyrene		£11,000
Double Glazing (16mm Argon Filled, Low E)	£ 7,000	
Triple Glazing (16mm Argon Filled, Low E)		£ 8,400
Photovoltaic Panels, 3kWp array, (21m^2 area)		£ 6,500
Miscellaneous and emabling works	£ 1,000	£ 5,000

Indicative retrofit costs for an unrenovated 90m^2 semi-detached dwelling



CO_2 reductions for an unrenovated 90m^2 semi-detached dwelling

Embodied carbon

Embodied carbon is the carbon emissions associated with the extraction and processing of materials, energy use in the factories and transport associated with the products used in the retrofit. It includes emissions associated with disassembly and disposal of these products at end of life as well as the construction of the building and repair, replacement and maintenance. It also includes the demolition and disassembly of the building at the end of its life. Low embodied carbon design is not inherently more expensive or more complex, it just requires awareness and good design.

What can you do?

Use re-used or reclaimed materials
Prioritise materials that are reused or reclaimed and that are durable. If not available use materials with a high recycled content.

Use natural materials
Use natural materials where possible. Insulation choice is a good opportunity to reduce embodied carbon.

3 Lean design
Finishes: Use self-finishing internal surfaces.
Building Services: Target passive measures such as improved fabric to reduce the amount of services needed. Reduce the need for long duct runs, specify low Global Warming Potential (GWP) refrigerant (max. 150) and ensure low leakage rate.

5 Encourage EPDs
Ask manufacturers for Environmental Product Declarations (EPD) and compare the impacts between products in accordance with BS EN 15804 (2019).

6 Easy maintenance and use
Consider maintenance & access requirements, maintained equipment will last longer.

7 Design for disassembly
Consider disassembly to allow for reuse at the end of life of the building, this is key to creating a circular economy. Create material passports for elements of the building to improve the ability of disassembled elements to be reused.

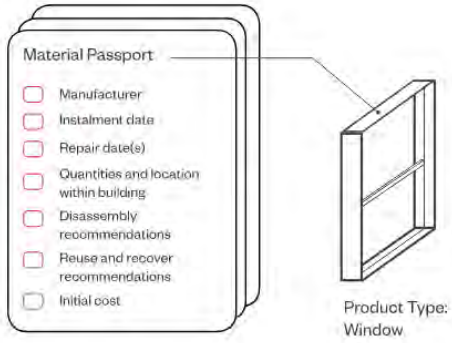
Sheep wool insulation (Source: Thermafleece)

Cellulose- made from recycled paper (Source: Eco Spray Insulation)

Cork insulation (Source: Corkribas)

Hemp insulation (Source: Unyte Hemp)

Some insulating materials like straw bale, hempcrete, and wool store (sequester) carbon and have negative emissions



Create material passports for products: A material passport provides identification of materials, components and technical characteristics with guidance for deconstruction and applicability of re-use. In this way the building becomes a material bank for future use.

Go to section…

How it comes together - Retrofit of a typical terrace house

Design checklist

Heating System

Replacing the heating system e.g. adding a heat pump can significantly improve efficiency

Mechanical Ventilation

MVHR 90% efficiency

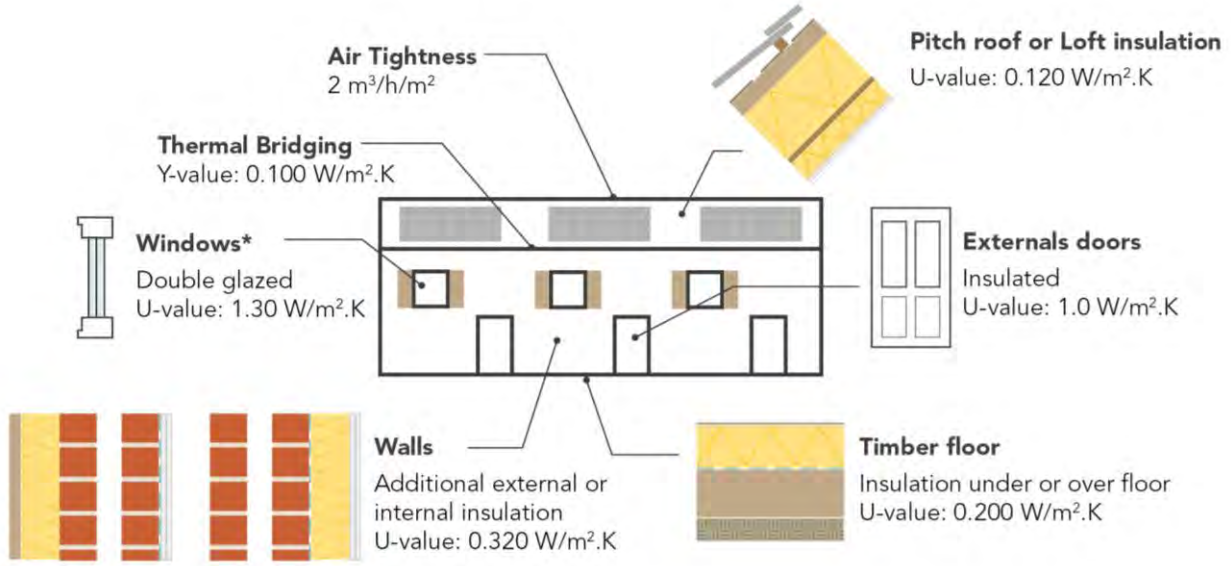
≤2m duct length from unit to external all

Airtightness

An extremely airtight building fabric of 2 m3/h/m2 at 50 Pa.

Improve fabric efficiency

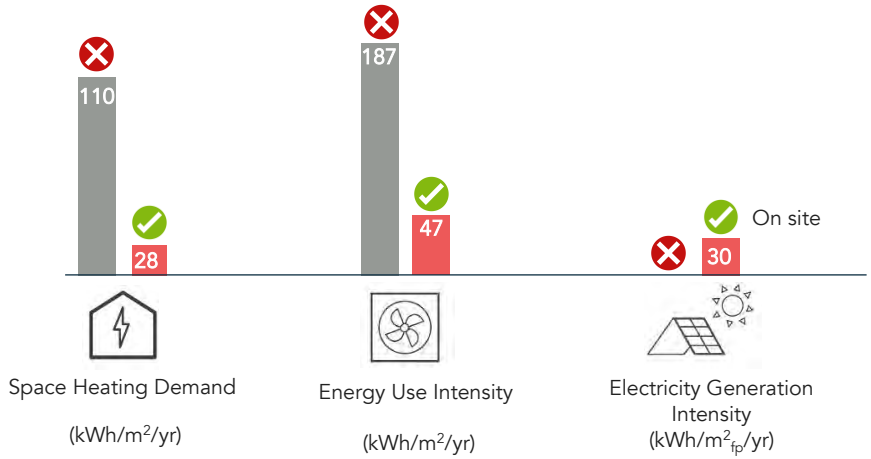
Add insulation externally or internally to improve fabric efficiency



Performance

As the Energy Use Intensity (EUI) is the same as the electricity generated on site that means that the building is net zero carbon.

- Typical terrace house built to building regulations
- New zero carbon terrace house



How it comes together - Retrofit of a terrace house in a conservation area

Working with constraints

A retrofit of building within a conservation area or with other heritage constraints can be challenging. It is therefore important to weigh up the options and "do the most where you can". It should be noted that these constraints do not apply to the majority of the houses in the U.K. and only a select few. It is advisable to bring on board a heritage consultant early to understand the constraint and work together to find appropriate solutions.

Consider a hybrid approach

Consideration to the placement of additional insulation to work with the building's aesthetics using a combination of internal and external insulation. For example, if a building has a decorative frontage which contributes to character of the street, it may be better to use internal insulation on this façade. Whereas the rear of the property may be seen as less significant and therefore external insulation could be applied here.

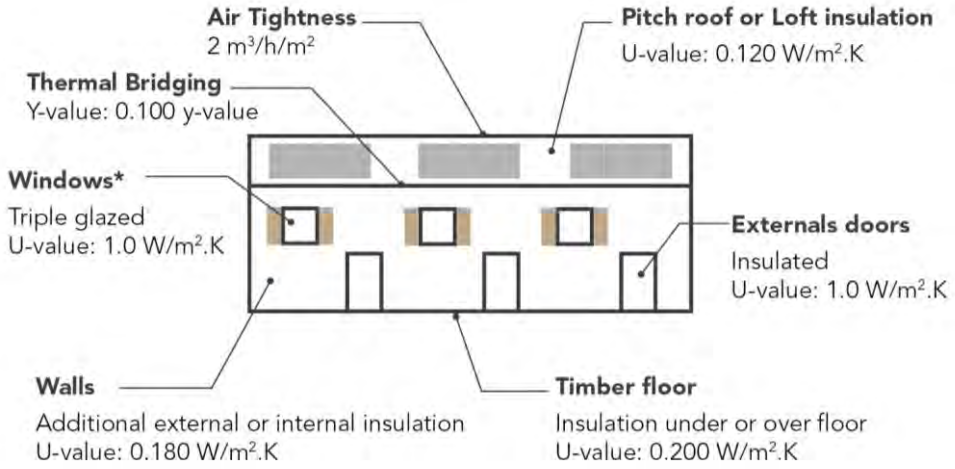
Breathable materials

In older stone wall construction that are more prone to damp, consider natural breathable materials (hydrophobic insulation) such as hempcrete which will not trap moisture.

Finding opportunities for renewables

Consider placement of solar panels on non prominent roofs that do not impact any constrained aesthetics. Also consider the orientation of solar panels to ensure they working efficiently i.e. avoid placing on shaded and north facing roofs.

Diagram illustrating a hybrid retrofit approach with internal and external insulation.



Recommended U-values to target net zero carbon for a constrained property.

Don't do this! (retrofit)

The intention of this toolkit is to provide clear guidance on what you should do when retrofitting a building to be Net Zero carbon. This page summarises some of the "Don'ts"…

Don't be misled by technologies and environmental schemes

When looking to build sustainable and low energy buildings, there are plenty of distractions. Many products, systems and technologies are suggested to be silver bullets in helping achieve Net Zero carbon buildings. Unfortunately, when put under scrutiny, many products or strategies do not achieve the desired outcome.

Additionally environmental schemes for existing homes may not all by themselves help the building achieve Net Zero carbon.

Avoiding business as usual

There is an emerging consensus in the construction industry on how to achieve Net Zero operational carbon. For example, there are several key energy efficiency, heating and ventilation principles which need to be adopted which have been discussed in earlier sections. Taking a business as usual approach to construction is not sufficient because many traditional ways of heating and ventilating homes are not aligned with a Net Zero objective.

Do not forget about the risk of moisture and condensation

One of the major risks associated with low energy and Net Zero carbon retrofit is creating areas where moisture condenses leading to mould growth. This typically happens when applying wall insulation, or where thermal bridges (e.g. around windows) are not treated to reduce the risk of condensation. It is extremely important to not forget about moisture as part of the retrofit process, and specialist advise should be sought to advise in order to mitigate this risk.

X *Do not replace the gas boiler. Heat pumps should be considered*

X *Do not leave open fireplaces.*

X *Do not install extract only ventilation systems. MVHR should be adopted.*

X *Do not install domestic wind turbines.*

X *Do not rely on trickle vents to provide ventilation. MVHR should be adopted.*

X *Do not install double glazing windows. Install triple glazed windows.*

Case studies for retrofit

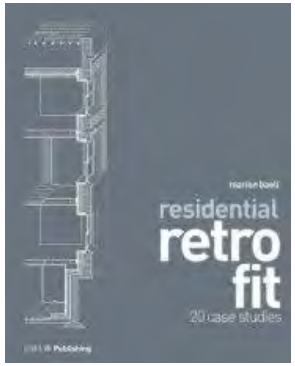
There are many examples

A lot of examples of successful retrofits are now available. The adjacent images illustrate different typologies and examples but there are many more.

Key lessons learnt

Successful retrofit relies on a structured process including adequate assessment, design, installation and monitoring as set out within the Publicly Available Specification (PAS) 2035. It is underpinned by the idea of a retrofit coordinator who will help lead the process from start to finish.

Opinion has varied on how far to go over the last 30 years. Schemes like the Green Deal did not set an end goal or a metric but used 'pay back rules' which tended to undermine whole house thinking and quality. Consensus is now emerging that whole house plans are an appropriate way to take into account the specific characteristics of a house while providing a flexible path to the end goal for homeowners and landlords. For example this would enable them to coordinate retrofit with their ongoing maintenance/extension and other life plans.



It can be done: the Technology Strategy Board "Retrofit for the Future" programme, undertaken over 10 years ago, delivered 80% carbon reductions on 37 pilot homes.

This included 11 pre-1919 homes which demonstrated that heritage sensitive retrofit measures can deliver the scale of carbon reduction we need to see happening more.

(© Marion Baeli, Paul Davis and Partners)

Shepard's Barn, County Durham
(Source: LEAP Architects)

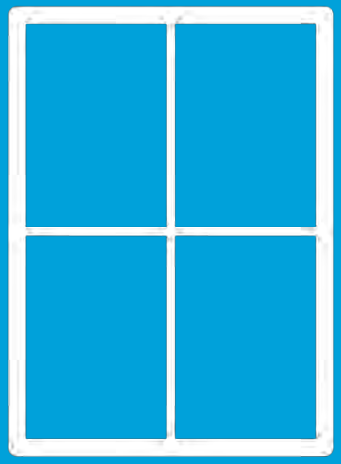
Passmore Street, London *(Source: Grosvenor Britain and Ireland)*

Ernley Close, Manchester
(Source: 2e Architects)

Wilmcote House, Plymouth
(Source: ECD Architects)

Grove Road, London
(Source: Bere Architects)

Akerman Road, London
(Source: 15-40 Architecture)



Products

Achieving Net Zero on new and existing homes also relies on good quality products.

This section explains the level of performance to require from products which will help to reduce energy use and generate renewable energy.

Windows

Window types

Window performance will vary greatly and is not always immediately apparent from their external appearance – or even price.

Key selection criteria

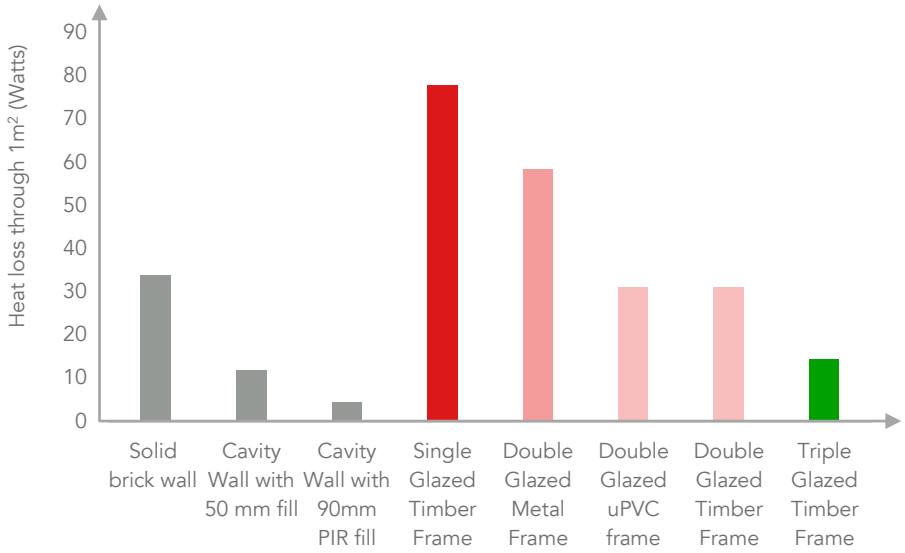
Glazing U-value - This is an indication of the ability of the glazing itself to retain heat. For double glazing, this should be 1.3 W/m²K or lower. For triple glazing you should expect 0.6 W/m²K or lower.

Frame type - The frame is an important part of the window's thermal performance. Generally, it is best to avoid metal frames unless they have a dedicated thermal break. Timber frames offer good levels of performance and are a good option in most cases and can be clad in aluminium if required. If you can find out the frame U-value, it should be ideally less than 1.6 W/m²K.

Whole window U-value - Sometimes, manufacturers do not provide a separate glazing and frame U-value and will only provide a U-value for the whole window. If this is the case, aim for <1.4 W/m²K for double glazed and <0.85 W/m²K for triple glazed.

Window design - For most types of frame, the frame performance will be worse than the glazing performance. This means that we should try and minimise the amount of frame – including mullions and transoms – to make the window as efficient as possible. This will also improve the amount of daylight entering the building.

Airtightness - The way in which the window's closing mechanism works, combined with the design of the opening sash sections will influence how good the window will be at keeping out draughts. Look for a multi-point mechanism with two separate seals – this will help with security as well as airtightness. Ask if the window has an air-permeability test rating – if it does, it should be Class 4.



Heat loss through 1m² of various wall and window types (with 0°C external temperature)

Triple glazed opening sash – timber frame with aluminium cladding and two seals (Source: Internorm)

Multi-point locking mechanism (Source: Sashed)

Doors

This page summarises some of the key selection criteria when reviewing which doors to purchase.

Key selection criteria

U-value – This describes the thermal performance of the door product. Consideration should be made to the U-value of the whole door unit. A U-value of 1.0 W/m^{2}K should be used as a guideline.

Glazed doors – If the door is glazed, then the glazing properties need to be considered. The g-value as well as the U-value needs to be considered as these impact energy performance and solar gains.

Airtightness rating – The airtightness rating of the doorset systems should be reviewed, and high performance systems specified.

Embodied carbon – The amount of carbon dioxide equivalent emissions generated in the production and manufacture of the door unit material should be considered.

Security – Consideration should be made to the security ratings when selecting the doors.

Performance ULTRA insulated timber door (Source: Green building store)

Triple glazed timber doors)Source: Green building store)

Triple glazed balcony door (Source: Internorm)

Garage Door (Source: Hormann LPU67 Thermo M)

Find High Performance Door Products

The *Passive House Institute Component database* is a fantastic way of searching for high performing door products.

Insulation materials

There are many types of insulation products which are appropriate based on their application. Insulation, and the systems used to support them are key to achieving low U-values. The following considerations should be made when selecting Insulation:

Key selection criteria

Area for use – Where will the insulation be used (e.g. external wall, roof, floor).

Thermal conductivity – How much heat the material conducts. The lower the conductivity, the better performing the product.

Moisture and air permeability – Some insulation products allow water vapor and/or air to pass through them, and some don't. It is important to understand their hygroscopic properties, particularly when retrofitting a pre-1919 building.

Thickness – The thickness should be considered to ensure it achieves the required U-value and aligns with building setting out. For external walls, it is important to ensure that the products used to support insulation are available in the length required.

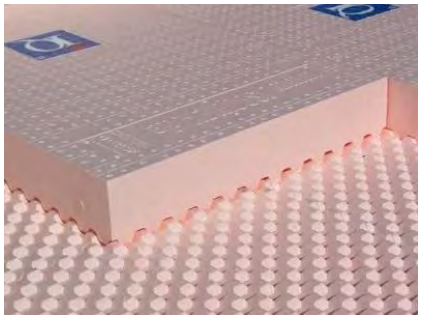
Physical properties – Insulation can be rigid or not, and there are advantages to both. Consideration should be made for insulation installation on site and methods of construction.

Fire rating – The building regulations associated with fire rating and insulation should be consulted to ensure safe and compliant products are used in the correct areas.

Compressive strength – Some insulation may require a degree of compressive strength, and this should be considered (usually floors).

Embodied carbon – The amount of carbon dioxide equivalent emissions generated when producing the insulation material should be considered.

Dritherm mineral wool insulation (Source: Knauf)



Insulating foundations (Source: Isoquick)

Structural insulating material (Source: Foamglas Perinsul)

Finding High Performance Insulation Products

The Passive House Institute Component database is a fantastic way of searching for high performing insulation products.

Airtightness products

Main building elements

The main building elements that form the airtight layer are the floors, walls, roof, windows/rooflights and doors.

Concrete surfaces such as a floor or roof slab can usually be considered airtight. Masonry walls built from blockwork are not airtight, but can be made so with a suitable parge coat and wet plaster. Timber framed structures such as walls and roofs can use airtight OSB boards or specialized airtight membranes to create an airtight building element.

Connections

Most connections between airtight elements of the building are made airtight through the use of specialist airtight tapes. These are designed and manufactured to last for many decades and should never be substituted for other construction tapes. Many different versions are available for different applications, for example fleece backed tapes that can be plastered over, double sided tapes for window frames, tapes for below ground use. Certain surfaces require application of a primer before taping, so make sure you know where these are on your project. Some sealants are also available for situations where tapes are not suitable.

Services

Building services such as cables, pipes and ducts can be sealed with airtightness tapes, or specialised grommets that come in a range of sizes and styles. While grommets are more expensive, they can reduce the amount of labour required to achieve airtight service entries.

Large airtight surfaces within buildings are typically created from airtight OSB, parge coat and wet plaster applied over blockwork, concrete castings, or specialised airtight membranes. Do not use cheap polythene membranes, as these are fragile and lack the rigidity to tape without creases that cause leaks. (Source: Pro Clima)

Components of the airtight layer are primarily connected together with tapes. Appropriate primers should be applied to certain surfaces before taping to ensure adhesion. Airtightness grommets and specialised long-life sealants are also available to assist with more specialist junctions in construction. (Sources: Pro Clima, Siga)

Ventilation units

Mechanical Ventilation with Heat Recovery (MVHR)

There are many MVHR units available on the market. In practice, a building services engineer or professional will often be involved in helping you to select an appropriate unit. Key selection criteria to consider are:

Air volume flow rate (litres per second) – This must be high enough to meet requirements in Part F of the building regulations, and to mitigate overheating risk.

Pressure drop (pascals) – This is how much pressure the MVHR can overcome and will influence your ductwork design.

Noise rating (dB) – This needs to be low enough at the design duty not to cause a nuisance. In a utility space NR35-40 may be appropriate, however if it is near living space or sleep accommodation NR25 or lower should be targeted.

Size – MVHR units come in varying sizes and shapes, some are more suited to cupboard installation and some are longer and flatter suited to a ceiling void. A key consideration for size is selecting a unit to suit the space available that allows for the filter to be easily changed.

Specific Fan Power (Watts per litre per second) – This is critical to the energy efficiency of the ventilation system. A value of 0.9 or lower is recommended.

Heat recovery efficiency (%) – This defines how much heat can be recovered from the exhaust air. For best practice a minimum of 90% efficient should be targeted.

Summer bypass – This automatically bypasses the heat exchanger so heat is not recovered when using the ventilation unit for cooling.

Certification – Choose an MVHR unit that is Passivhaus certified to ensure quality and performance

A range of Passivhaus certified MVHR units are available in both wall and ceiling mounted designs. The performance of Passivhaus certified units has been independently verified, which can be a good indication that a manufacturer is motivated to demonstrate the energy performance of their product. (Sources: Paul Heat Recovery, Zehnder, Brink)

Pre-insulated MVHR ducting is available from a range of manufacturers in both rectangular and round format. These systems can simplify duct installation between the MVHR unit and outdoor air terminals, improving energy efficiency. Combined intake/exhaust terminals are also available, which often help to minimise duct length, also increasing efficiency. (Sources: Domus Ventilation, Paul Heat Recovery)

Waste Water Heat Recovery Systems

Waste water heat recovery systems recoup heat

Waste water heat recovery (WWHR) systems recover heat from shower or bath water as it is drained, this is used to warm the incoming mains water. The systems are very simple, and typically come in two forms, vertical or horizontal.

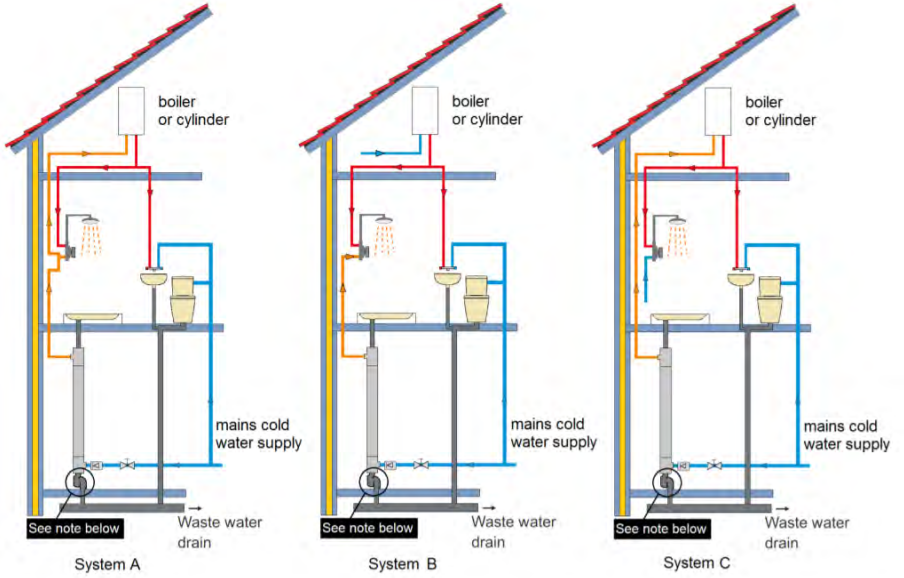
WWHR systems can be included in retrofit

Although WWHR units are far easier to install for new housing, this does not mean they cannot be installed as part of retrofit. As long as there is access to the pipework serving the shower and suitable pipework lengths, a unit can be installed.

Key selection criteria

Efficiency of recovery unit (%) – This represents the percentage of heat recovered by the MVHR system compared to actual heat required for the shower. The efficiency is greater for showers with lower flow rates. For vertical units, target greater than 55% and for vertical units, target greater than 25%.

Other key considerations during selection and installation include shower flow rates, pipework connection sizes for the mains water and waste water, and water pressure. Manufacturer guides will provide acceptable ranges and details for their products.



System A	- WWHRS outlet connects to water heater inlet AND shower cold inlet
System B	- WWHRS outlet connects to shower cold inlet ONLY
System C	- WWHRS oulet connects to water heater ONLY

A diagram of installation configurations for waste water heat recovery.

(Source: HeatraeSadia)

Heat pumps

Selecting the right heat pump

Sizing a heat pump is never simple. There is no one-size-fits-all as the heating demands of every property and family is unique. To get air source and ground source heat pump size right, the following things should be considered.

- Type/size of property
- Level of insulation/heat loss
- Size of radiators/underfloor heating
- Desired indoor temperature
- Seasonal outdoor/ground temperatures in your area

Key selection criteria

Maximum heating capacity (kW) - Heat pumps are given output ratings in kilowatts (kW) which represent how powerful a heat pump is. For heat pumps, bigger is not always better though: they should be sized according to the peak heating demand. Max heating capacity tends to range from 4 kW and 16 kW.

Minimum heating capacity (kW) - The minimum capacity of the system selected is as important as the maximum. A good heat pump has adequate turn-down to perform well during low-load conditions as well as peak conditions

Coefficient of Performance, CoP – The efficiency of a heat pump is expressed as ratio of the heat energy produced to input electrical energy. For example, if a heat pump produces 4 kWh of usable heat for a home and requires 1 kWh of electricity to do so, it has a COP of 4.

Seasonal Coefficient of Performance, SCoP - This is an average coefficient of performance taken across the entire heating system, and the main metric used to define the performance of a heat pump.

Maximising heat pump efficiency

The efficiency of heat pumps increase as the temperature difference between the heat source and system temperatures. To increase efficiency consider:

Lower system temperatures - Whereas radiators typically require a minimum water flow temperature of 45-55˚C, underfloor heating can operate as low as 25-35˚C. Lower system temperatures also mean lower losses in conversion, storage and distribution of heat.

Heat source - The temperature of the ground is roughly 10–13˚C all year round, so a ground source heat pump remains consistently efficient, unaffected by seasonal changes. An air source heat pump on the other hand is subject to fluctuating air temperatures. In the colder months, when there is the greatest demand for heating, they are at their least efficient.

Maintenance and warranty

When correctly installed, heat pumps should require little maintenance and last for at least 20-30 years. If something does go wrong, it can lose efficiency fast, but this underperformance should be noticeable. Most heat pumps come with a 5-10 year warranty on parts and labour.

	Heat Pump Type	Standard CoP	Best Practice CoP
Heat Pump - Space Heating	ASHP	2.50	3.50
	Closed GSHP		4.50
	Open GSHP		5.50
Heat Pump - Domestic Hot Water	ASHP	2.0	2.50
	Closed GSHP		2.50
	Open GSHP		3.00

Air source heat pumps (ASHPs)

Efficient and fossil fuel free

Air source heat pumps (ASHPs) absorb heat from the outside air, from temperatures as low as -15°C, to provide space heating and hot water. They run on electricity but are far more efficient at generating heat than conventional systems and therefore require less energy. Unlike gas and oil boilers, heat pumps tend to deliver heat at lower temperatures over much longer periods.

The two main types

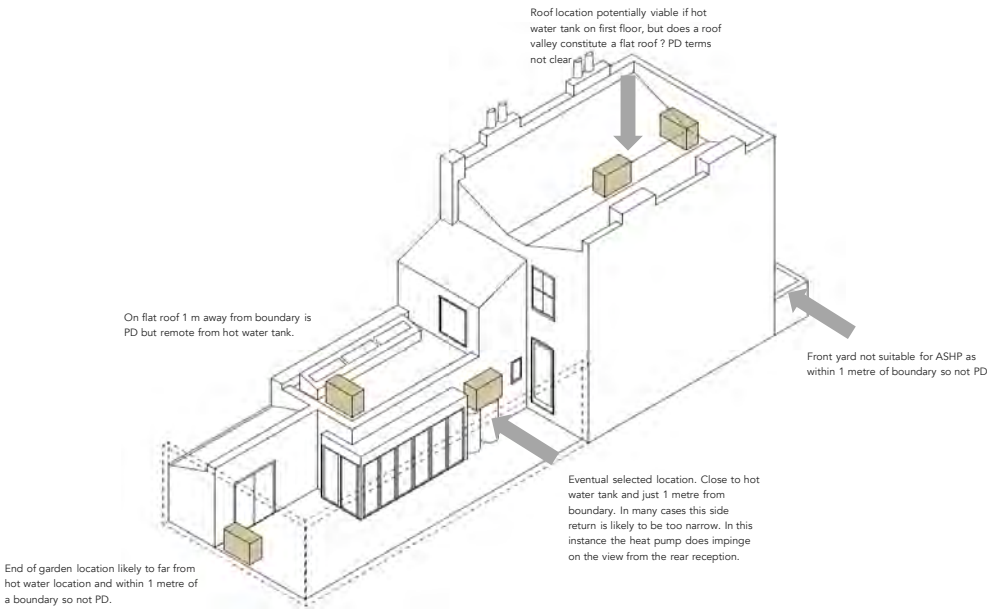
Air-to-water heat pumps are the most common and can be used with a wet central heating system. Because of the lower temperatures they work well with underfloor heating or larger radiators. Air-to-air heat pumps provide warm air directly to a room. They will not provide you with hot water as well.

Heat pumps need a home, and you may need planning permission

You will need a place outside the home where the external unit can be fitted to a wall or placed on the ground, with plenty of space around it for air flow. The external unit is often connected to an internal unit containing circulation pumps and hot water, which is usually larger than the average boiler. Although they might not take up much space, heat pumps may be visible. If permitted development rights cannot be used, a planning application may be required with a noise report.

Potential fuel bill savings

Installing a typical system costs around £5,000 to £11,000. It will most likely reduce fuel bills if replacing a conventional electric heating system, but you are unlikely to save much on your heating bills if you are switching from mains gas, unless other energy efficiency and fabric improvements are made.



Potential locations identified by the architect for a terrace house

(Source: Prewett Bizley Architects)

Benefits

1. It could lower fuel bills if replacing conventional electric heating
2. It could provide an income through the UK government's Renewable Heat Incentive (only applies to air-to-water heat pumps)
3. Fossil fuel free and highly efficient therefore will reduce carbon emissions
4. It can provide hot water as well as space heating
5. It can be easier to install than a ground source heat pump

Ground source heat pumps (GSHPs)

Efficient and fossil fuel free

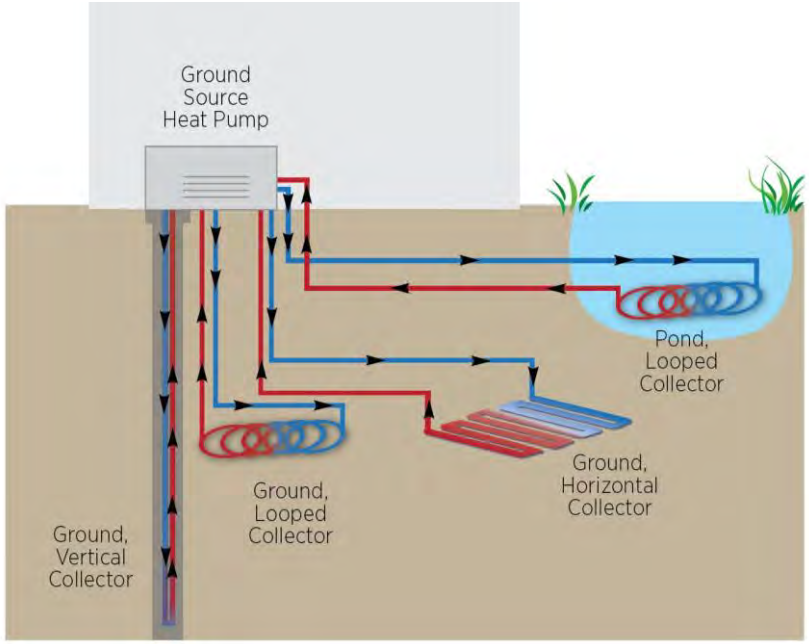
Ground source heat pumps (GSHPs) use a buried ground loop to extract heat from the ground which is then passed through a heat exchanger into the heat pump. This heat can be used to serve radiators, underfloor heating, warm air systems and hot water. Heat pumps run on electricity, but the heat they extract from the ground is renewed naturally. They are far more efficient at generating heat than conventional systems and therefore require less energy.

Space is required for the ground loop

The length of the ground loop required depends on the amount of heat needed. If there is enough space, the loop can be laid horizontally in a trench. Where there is not room to do this, you can drill vertical boreholes, typically between 90m and 160m deep, but this requires specialist machinery and may increase the cost of installation.

A potential source of income

Installing a typical system costs around £14,000 to £19,000. It will most likely reduce fuel bills if replacing a conventional electric heating system, but you are unlikely to save much on your heating bills if you are switching from mains gas, unless other energy efficiency improvements are made. If the system is part of a new development, combining the installation with other building work can reduce the cost of installing the system. You may be able to receive payments for the heat you generate using a heat pump through the *UK Government's Renewable Heat Incentive*.



Different types of ground loop can serve the heat pump depending on the space available. (Source: Kete-RVS)

Benefits

1. It could lower fuel bills if replacing conventional electric heating
2. It could provide an income through the UK government's Renewable Heat Incentive
3. Fossil fuel free and highly efficient will reduce carbon emissions
4. It can provide hot water as well as space heating
5. Minimal maintenance required

Domestic appliances

White goods

The main energy consuming appliances to consider are dishwashers, clothes washers, clothes dryers, refrigerators, freezers and cookers. When purchasing from new, energy labels should be available. Compare these to best practice performance on the Top Ten UK site below, and choose the most efficient appliance that meets your needs.

If purchasing second hand appliances, energy labels can often be found by searching the model number of the appliance.

Consumer electronics

The energy consumption of consumer electronic devices is usually quite low. Possible exceptions include devices that produce heat, such as coffee makers with keep hot functions.

Audio visual

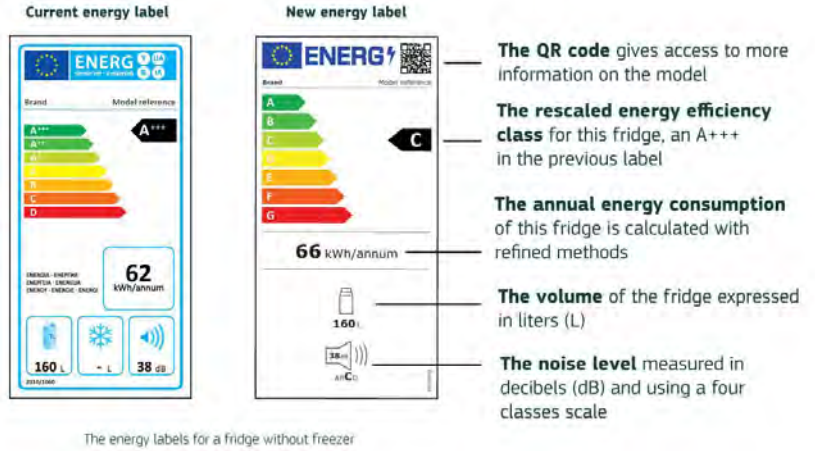
Most new televisions and stereos are relatively energy efficient, however energy labels are available, so follow the same advice as for selecting white goods. Games consoles have powerful processors that can use reasonable amounts of energy, so should be turned off when not in use.

Standby consumption

While electricity use in standby mode (also known as vampire load, or phantom consumption) used to be a significant concern, a series of increasingly stringent EU regulations over the past decade have effectively reduced it to negligible levels.

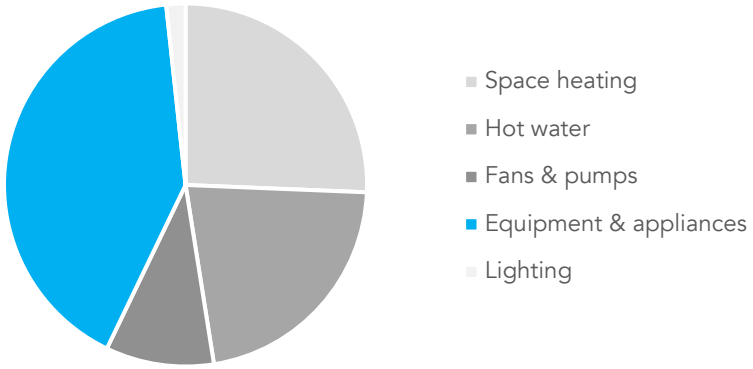
Resources

The Energy Saving Trust's 'Top Ten' is an excellent resource that lists the most efficient appliances currently available on the market.



The energy labels for a fridge without freezer

Most appliances for sale in the UK will continue to carry EU energy labels. These were rescaled in Spring 2021 to adopt the original A to G system, ending the use of A or higher ratings. Under the new scale, there are few A-rated appliances currently on the market – this is intentional, to allow room for future improvements to efficiency.*



Electricity used by equipment and appliances is likely to be the largest end use of electricity in many net zero energy homes, so it is important to choose the most energy efficient appliances you can. Data based on energy modelling for a net zero energy new build home.

Solar photovoltaic (PV) panels

Solar PV panels

Modern solar PV panels are a simple, mature and reliable technology. Most solar PV panels currently manufactured are based on wafers of monocrystalline silicon. Outdated polycrystalline technology is still available and should be avoided. Choose a panel with a 25 or 30 year linear power output warranty.

Sizes vary, but 1,730mm x 1,040mm is typical. Expect a power output of 360 Watts per panel, though up to 400 Watts or more is possible. It does not usually cost much more to specify a higher power panel, so this is often a good option to consider, particularly if you plan on using a heat pump or electric vehicle in the future.

Solar tiles are available, however standard format solar panels dominate the market for good reason. If you decide to install solar tiles, choose a company with a track record that will be around in the future to provide spare parts and support if required.

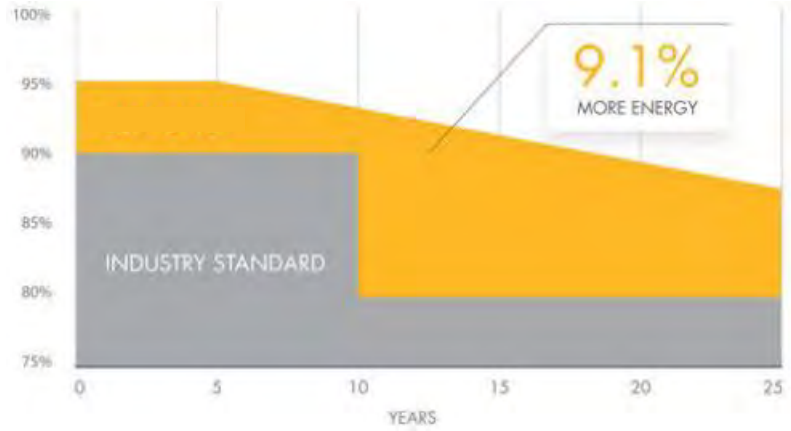
Inverters

The inverter in a solar PV system conditions the electricity generated by the solar panels so it is safe to use in your home. Traditional systems used a single large inverter, however small 'microinverters' that mount behind each panel offer numerous benefits. They cost a little more than a single larger inverter, but can increase energy output up to 15% and are very reliable, with 25 year warranties available.

Batteries

In many cases, batteries cost more to buy and operate than they will ever save you, though there are exceptions. Batteries also increase the complexity and embodied carbon of a solar PV system. Consider smart thermostats, solar hot water diverters and solar EV charging to increase self consumption of solar electricity.

Specify monocrystalline silicon solar panels and microinverters for best long-term performance. Image shows a generic solar panel and an Enphase IQ7 microinverter. (Source: Enphase Energy)



Power output warranties lasting 25 to 30 years are standard for solar photovoltaic panels. Look for a panel with a linear (rather than stepped) performance warranty for increased lifetime energy production. (Source: SunPower)

How to Specify

Delivering homes that will perform well in reality (and not just on paper) relies on a quality assured construction or retrofit process.

This section provides guidance on how to specify key elements.

Approach to deliver Net Zero carbon buildings

Decide on your targets

From the very start of the project, you should be clear about the targets that you are aiming for. For both new build and retrofit, this should be expressed in Energy Use Intensity (EUI) and Space Heating Demand. Both of these should be modelled early on to see how your project matches up. Space Heating Demand is an excellent proxy for the fabric efficiency of the building. It will tell you how far you have gone down the fabric first approach. Exemplar values for homes are 15 kWh/m^2.year for new build and 25 kWh/m^2.year for retrofit, although retrofits can be challenging and a target of 50 kWh/m^2.year would be a significant achievement in most cases.

Do whatever it takes to move to electrical heating and hot water

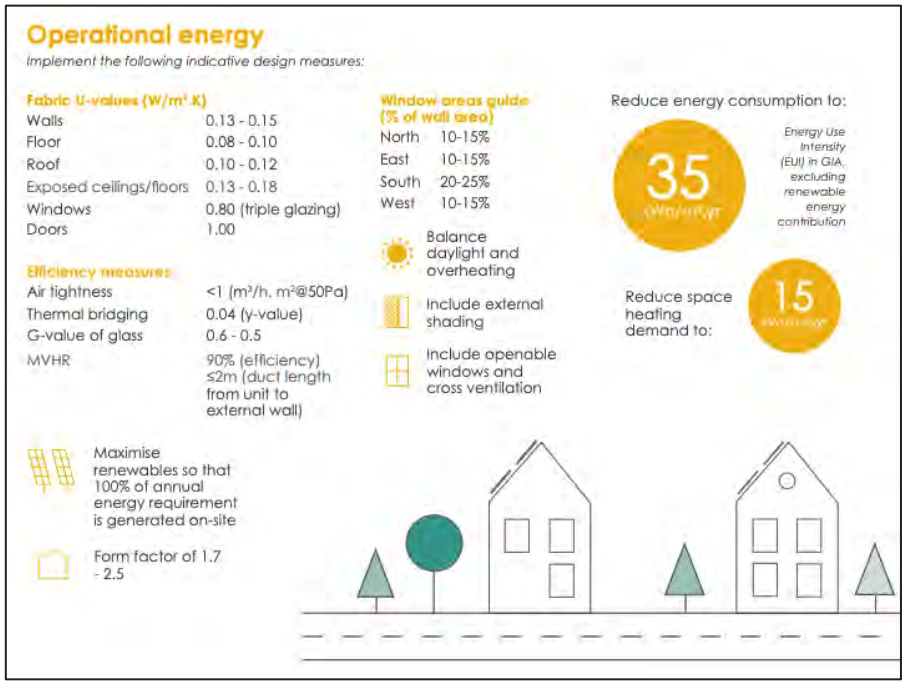
This guide has made it clear that fundamental to achieving Net Zero carbon homes is transitioning to electrical based heating and hot water to capitalise on grid decarbonisation. To avoid high running costs, this is best achieved by fitting heat pumps. Thus, make sure you design your fabric, heating and hot water strategy around the basic premise of a heat pump. For retrofit, even if you can not fit one straight away, put enabling measures in place so one can be fitted in the future.

Build the team's knowledge

Much of what goes in to a Net Zero homes, it not necessarily part of normal building practice. It is important to get the whole team on board from the designers, right through to the site team. Arrange regular tool box talks so that everyone understands the key principles that are being targeted like airtightness and eliminating thermal bridging.

Measure the results

How do you know it has worked? It is now cheap and easy to monitor energy use so put this in place as part of the project so you can see how it performs and, if necessary, make some improvements next time.



LETI Targets for new-build dwellings (Source: LETI Climate Emergency Design Guide)

The AECB Retrofit standard sets a space heating demand target of 50kWh/m^2.year

Go to section…

Finding competent contractors

There is no substitute for experience

When looking for suitable contractors, find out if they have completed any low energy or Net Zero projects. Ideally, they will have completed a project which has been quality assured or certified in some way. A Passivhaus certified project (new build or retrofit), AECB self-certification with independent verification, or a self-declared LETI Pioneer project would all be good indicators. Failing that, any project which has good post-occupancy monitoring data showing its actual performance is also a good sign.

National schemes

PAS2035 sets out a framework for the design and management to ensure the safe and effective implementation of energy efficiency measures. PAS2030 set out the standards that must be achieved in installing these energy efficient measures. If you are embarking on anything more than a very minor retrofit, then it would be advisable to ensure that your design team includes a qualified Retrofit Coordinator who has met the requirements of PAS2035 and that your contractor has achieved PAS2030 certification.

Other trade bodies

For specific retrofit elements, there are also other trade bodies which you can ask whether your provider is registered with:

- *Cavity Insulation Guarantee Agency*
- *Solid Wall Insulation Guarantee Agency*
- *Microgeneration Certification Scheme (MCS) - for heat pump and Solar PV installations*
- *Trustmark*

PAS2030 and PAS2035

Agencies and schemes which protect consumers and require certain standards

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Specifying airtightness requirements

This section summarises the requirements during construction in order to ensure that the airtightness target can be achieved.

Managing the airtightness risk

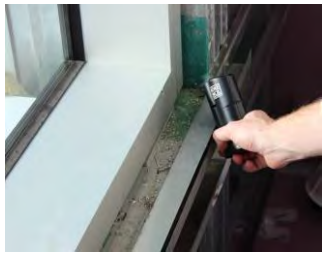
It is possible to robustly manage the risk of achieving the airtightness requirement on site. The contractor should take responsibility for delivering the airtightness and propose a robust strategy. A programme including interim leak tests, proposed materials and proposed responsibility will be required as a minimum. Early testing gives reassurance that the quality of construction is on course to meet the target, and allows any quality issues to be easily and cost effectively found and rectified. Leaving these issues to the end of the project is a far more risky and potentially costly approach and may lead to failing to meet the airtightness target.

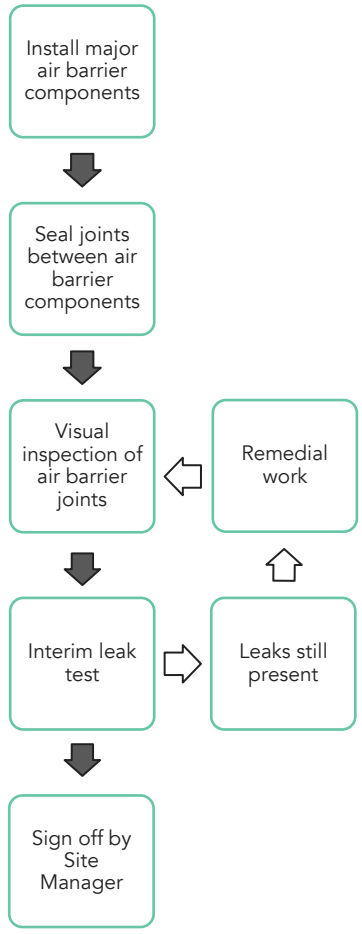
The importance of interim leak testing

A phased leak testing strategy is recommended. Each dwelling should be tested for air leaks before the air barrier is covered or closed up.

- ✓ All air barrier parts should be installed and open to visual inspection.
- ✓ Using a blower door fan to negatively pressure areas undergoing internal investigation or positively pressurise areas for external investigation.
- ✓ Carrying out investigation on the air barrier side of the construction (internal for most of the building.)
- ✓ Using thermographic camera equipment, smoke pens, or feeling the joints to identify any air leaks.
- ✓ Remedying any leaks.

A section should be deemed to pass the leakage test when no leaks in the external fabric can be detected with reasonable effort.





Recommended airtightness process: visual inspection, leak finding and interim air testing are all required before the final air test

Commissioning of heat pumps and MVHR systems

Heat pumps

The commissioning of a heat pump is very similar to the commissioning of a boiler.

- Ensure the system is watertight – complete a standard test, first with pressurised air, then with water.
- Ensure the fuel source is safe – in this case check the electrical test certificate is in place.
- Ensure the unit is functioning correctly – check the flow volume and temperature (ideally at varying external air temperatures)
- Ensure the water pressure is inline with manufacturers recommendations.
- Ensure the user is trained – make sure any alarms are being generated correctly and that the user understands what protocols to follow for each alarm option.

MVHR systems

The following items should be checked on MVHR units

- Check filters are clean
- Inspect ductwork for any air leaks and seal where appropriate.
- Check that the ductwork is clean at the terminals
- Set the fan speed and balance the supply and extract flow rates
- Ensure the supply and extract rates to each grille are operating at the design air flow
- If there is a boost function make sure that this works correctly
- Ensure the user understands how to use and maintain the MVHR

Examples of Passivhaus certified MVHR units.

(Sources: Paul Heat Recovery, Zehnder, Brink Climate Systems, Vallox, Airflow Developments

Building performance delivery schemes

This page summarises several operational energy standards which would help achieve the levels of energy efficiency and construction quality required to deliver Net Zero carbon buildings.

New build standards

Passivhaus Classic, Plus and Premium - These schemes are facilitated by a designer and third party certifier to ensure the design and construction achieve best practice levels of energy efficiency and renewable energy generation (for Plus and Premium).

PHI low energy building standard - Similar to Passivhaus, this standard has slightly reduced energy efficiency targets.

Building Energy Performance Improvement Toolkit (BEPIT) – This scheme provides a practical framework through each stage of the project in order to deliver energy efficiency measures on site.

Retrofit standards

EnerPHit – Similar to Passivhaus, this scheme helps deliver exceptional levels of energy efficiency through deep retrofit and refurbishment.

AECB Low Energy Retrofit Standard – This standard is primarily focused on improving the building fabric but low carbon heat also needs to be considered.

Energiesprong – A model for retrofitting several homes at once. The up front costs of this scheme are financed through a payback based on savings to the tenants bills and an additional 'comfort charge'.

PAS 2035 – This code of practice published in 2019 seeks to provide quality assurance for retrofit. It focuses on the process, not the target(s).

New build standards

Retrofit standards

Standards summarised on this page help achieve the space heating and energy consumption levels of performance required to achieve net zero carbon buildings.

Some standards also address low carbon heat and renewable energy generation but they focus primarily on energy efficiency. Embodied carbon is not addressed by the above schemes and would require separate consideration

Building regulations and planning approval

When you need building regulations approval

Most building work (whether refurbishment, retrofit or new build) will need building regulations approval. Building Regulations is mostly concerned with ensuring homes are safe to live in.

In most cases your builder or tradesperson will be responsible for ensuring building regulations approval is obtained. However, you should check this at the beginning and be clear who is liaising with the building control body. The ultimate responsibility lies with the building owner, and fines may be issued where approval is not obtained.

You will need to use a building control body to check and approve work before, during and after construction. This can be through a local authority building control service (LABC) or through a private approved inspector. In some cases tradespeople can self certify, if they are registered with a competent persons scheme.

When you need planning

If you are altering the appearance or function of your building or site you may need to apply for planning permission from your local authority. This will be required if you want to:

- build a new home
- build an extension above a certain size
- change the use of an existing building for residential use.

To find out if you need planning permission, and how to apply for it, contact your local planning authority (LPA) through your local council.

Sources of information

The Planning Portal website and the Local Authority Building Control websites are both excellent sources of information on planning permission and building regulations approval.

	Building regulations approval	Planning permission
Objective:	To ensure the safety and health of people in or about those buildings.	To control the impact the development will have on the general environment.
Concerned with:	• Structure • Fire safety • Electrical safety • Access • Ventilation • Energy efficiency	• Appearance • Impact on neighbouring properties • Landscaping • Highways access
Through	• A building control body (through local authority or privately). • Competent persons scheme for some small works (e.g. repairs, replacement or maintenance.	• Local Authority planning department.
Find out more		• Planning Portal • Mid Devon District Council

- ☑ Always check with your local authority whether you need either planning permission or building regulations approval.
- ☑ Are your tradespeople registered with the competent persons scheme?
- ☑ Check “right to light” laws when building, which are not included in the planning permission process, but a a legal right of neighbouring properties.

Communicating this to customers and clients

The industry is on a path to Net Zero carbon

We are in a climate emergency and it is important that we communicate this effectively to customers and clients to ensure immediate action is taken to meet our Net Zero carbon target. In 2019 the UK Government amended the Climate Change Act to adopt the recommendations of the Committee on Climate Change, and adopted a target for achieving net zero emissions by 2050. Delivering Net Zero carbon homes is an attainable target which can be achieved today and in recent years this has been clearly mapped out.

The future of housing

The Committee on Climate Change (CCC) report 'UK housing – fit for the future?' highlights the need to build new buildings with 'ultra low' levels of energy use. It makes a specific reference to space heating demand and recommends a maximum of 15-20 kWh/m^2.yr for new dwellings. Currently new domestic buildings can have a heating demand ranging anywhere from 40-120 kWh/m^2.yr. Buildings provide a significant opportunity for reducing emissions without impacting the quality of experience for those that use them. Targeting good practice design, such as Passivhaus for new homes, and well considered retrofit strategy will also ensure high construction quality and minimise defects on site.

Affordable and clean energy for residents

The transition to Net Zero carbon housing will also improve energy bills for residents, as well as local air quality. Moving away from fossil fuels and switching to low carbon heating is a necessary part of meeting Net Zero carbon.

The UK Government has committed to Net Zero emissions by 2050. Many regions and organisations are being put under pressure to improve on this. Over 1400 local jurisdictions, including Oxford, have declared a climate emergency.

Extinction rebellion and School Strikes for Climate protests showing strong public support for response to the Climate Emergency and action today. Greta Thunberg and the Schools strike movement have inspired the next generation of citizens Worldwide.

(Sources: Participedia, The Guardian)

The importance of maintenance – Keep operating at Net Zero carbon

In order to for a building to operate at Net Zero it need to be maintained properly, particularly in the following areas.

MVHR

MVHR needs to be installed in an accessible location as filters need to be cleaned/changed every 3-6 months so that it operates efficiently.

Heat Pumps

Immersion heater should only be used as a back up to heat the water in the hot water store and only manually switched on if the heat pump is not working. If the Immersion heater is an automatic back up (might be the case for Exhaust air heat pump) – use of this Immersion heater should be closely monitored to make sure that it is not turned on more than it should be.

Airtightness layer

There is a continuous airtightness barrier around the building. It is important that this barrier is not broken, otherwise the airtightness of the building will get worse. Key watchpoints;

- Drilling into the wall – know where the airtightness layer in the building avoid damaging it by drilling through / perforating it.
- New penetrations for equipment such as washing machines, should be installed with airtightness grommets so that the water pipes do not increase the air permeability.

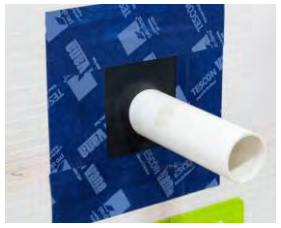
Solar PV

Every few months it is good to check the generation meter, to make sure that the panels are generating electricity and there is no fault. It is also important to clean the Solar PV panels every year, to make sure that they are operating as efficiently as they can.

Dirty filter

Clean filter

MVHR filters are easy to remove and clean, clean filters improve energy efficiency.
(Sources: Vent Axia, Nuaire,)



Airtightness grommets need to be used so that service penetrations do not increase air permeability
(Source: Pro Clima)

PV panels need to be cleaned at least once per year.

(Sources: EasyAcc, Amethyst Cleaning)

Checklist for new build: design and construction

What to do when? Checklist for design and construction

RIBA Stage 2 - Concept Design	✓
Optimise building orientation to balance solar gain and increase south facing roof area. Design roof to maximise density of renewables.	
Calculate and report the building form factor for design options.	
Arrange embodied carbon workshops with design team to target lean design principles and reduce big tickets items e.g. structure.	
Identify design team members to carry out embodied carbon assessment. Carry out multiple embodied carbon calculations of key elements to demonstrate low carbon design choices.	
Mark-up insulation line on all plans and sections. Mark unheated external areas on plans.	
Allow sufficient wall construction thickness for all insulated walls, roofs and floors.	
Mark window openings for providing natural ventilation for summer comfort.	
Identify a location for the MVHR next to an external wall.	
Carry out preliminary overheating risk assessment using the Good Homes Alliance overheating checklist.	
Carry out initial PHPP model.	
For projects using Passivhaus certification this is a good time to consider an appointment.	

RIBA Stage 3 - Spatial Coordination	✓
Review mark-up of insulation line on all plans and sections and carry out initial U-value calculations.	
Carry out heating options appraisal including a low carbon option.	
Hold a thermal bridge workshop. Include the structural engineer for review of columns, masonry support etc.	
Provide MVHR layout including duct distribution and measurement of intake and exhaust duct lengths to external walls for sample dwellings.	
Carry out full embodied carbon assessment of whole building and compare against embodied carbon target. Implement reductions where necessary.	
MEP consultant to review embodied carbon impact of services and reduce the amount of kit where possible. Use CIBSE TM65 embodied carbon in building services to assess impact.	
Carry out PHPP modelling alongside SAP calculations. List all model assumptions including U-values, thermal bridges and system specifications etc.	
Carry out overheating assessment and eliminate overheating through passive strategies where possible (TM59). Ensure all element assumptions match PHPP and SAP models.	
Calculate electricity generation intensity of PV arrays and review against KPI.	
Define airtightness strategy and identify airtightness line on plans and sections.	
Measure heating and hot water pipe lengths for sample dwellings. Minimise distribution or standing losses.	
Demonstrate distribution losses have been calculated and reduced.	
Prepare RIBA Stage 3 report and include predicted operational cost to tenant.	

MVHR: Mechanical Ventilation with Heat Recovery

PHPP: Passivhaus Planning Package

This design checklist provides a list of key actions that should be carried out at each work stage to meet the KPI targets for new homes.

This should be shared with the design team to check off after each stage is complete.

What to do when? Checklist for design and construction

RIBA Stage 3+ - Early Technical Design (and tender)	✓
Detail build-ups of all external elements including thickness and conductivity of all materials.	
Detailed U-value calculations (including masonry support system, etc.).	
Identification of all thermal bridge junction types (e.g. parapet A, parapet B).	
Thermal bridge calculations for a selection of the most important junctions.	
Definition of airtightness testing requirements for contractor.	
Include requirements for Environmental Product Declarations (EPD) in the tender. Make EPDs obligatory for structural materials, primary façade and any other major materials.	
Include KPI requirements in the tender.	
Agree scope of Post-Occupancy Evaluation in tender. Identify level of participation from contractor and design team.	

RIBA Stage 4 - Technical Design (in addition to Stage 3+)	✓
Develop junction details for window and doors.	
Review airtightness line on each drawing and identification of airtightness requirements for service penetrations.	
Carry out a thermal bridge workshop to review thermal bridge lengths and calculate Psi-values for all junctions.	
Review MVHR layout including duct distribution and measurement of length of intake and exhaust ducts for all homes.	
Measure heating and hot water pipe lengths for all communal areas and homes.	
Carry out embodied carbon assessment of whole building using accurate Bills of Quantities.	
Specify high performing PV panels.	

RIBA Stage 5 - Manufacturing and Construction	✓
Run an introduction to ultra-low energy construction workshop on-site.	
Encourage site manager and team training on construction quality requirements covering insulation and airtightness.	
Prepare toolbox talk information for site team inductions on low energy construction quality.	
Review alternative materials or products proposed by the contractor. Ensure substitutions do not compromise the thermal performance or embodied carbon target.	
Carry out regular construction quality assurance site visits and reports (depending on the size of the scheme – at least six) in tandem with regular visits.	
Develop site quality tracker, assess against KPIs and update regularly.	
Require leak finding airtightness tests at first fix and second airtightness test pre-completion.	
Witness commissioning of MVHR systems and heating system.	
Carry out predicted in-use energy model of each building leading to the final 'as built' PHPP model.	
Consider recalculating embodied carbon using 'as built' information.	

RIBA Stage 6 - Handover	✓
Provide building and operational information to residents in the form of site inductions and simple building user guides and instructions (e.g. sticker on MVHR for filter replacement).	
Consider embodied carbon as part of the replacement and maintenance strategy and include in the O&M manual.	
Carry out post-occupancy evaluation during first 5 years of use and verify KPIs have been met.	
Lessons learnt project review with design team.	
Publicly report KPIs.	

MDDC 'Net Zero Housing Assessment Tool'

Background
Mid Devon District Council (MDDC) developed a tool with the University of Exeter to assess the costs and climate impacts of various "low carbon" standards for new housing developments. The project was funded through the Local Government Association's Housing Advisers Programme and will be available to other local authorities.

How the Tool Works
The tool calculates carbon performance (based on regulated emissions from Part L of the Building Regulations, and embodied carbon if selected) of four dwelling typologies: detached, attached, 1 bed flats and 2 bed flats for a range of fabric and building services specifications. The tool then sizes the required PV array to meet Part L, and any further improvements that have been stipulated. It then establishes the cost uplift to achieve performance standards compared to the lowest cost means of meeting the minimum requirements of the Building Regulations.

A full description of the model and calculations can be found in report CEE ID 1009 "The Development of a 'Low Carbon Affordable Housing Development Framework Assessment Tool' for New Development in Mid Devon", March 2022. The model is a high level tool that makes a number of assumptions and is NOT intended as a substitute for detailed SAP calculations.

How to Use the Tool
The Input Sheet
On the input sheet all yellow boxes are required inputs, and orange boxes are voluntary inputs. **Specific guidance for completion of each input is given on the Input sheet.**
In summary, these inputs are:

Development Description
Year of development: The tool assumes a development is delivered in a single year.
Number of dwellings: This is the total number of dwellings in the development.
Build mix: This is the % breakdown for each of the four dwelling types. These percentages must sum to 100%.
Height of buildings with flats: Where there are flats, the height in storeys of buildings containing flats must be entered.

Operational Standards:
Building Regulations Minimum Standard: The baseline operational performance standard is taken to be Part L of the day which is established from the build year and includes a 1 year transitional period. In other words, buildings prior to 2026 are assumed to be under Part L 2021, and from 2026 the Future Home Standard (FHS).
Fabric standard: It is possible to set a minimum fabric standard expressed in kWh/m2 per year up to 15 kWh/m2.year (Passivhaus standard).
Gas connection: It is possible to ban connection to the gas network. Even if gas is allowed, it is assumed that after 20 years all dwellings with gas boilers are replaced with heat pumps.
Carbon standard: It is possible to set improvement beyond Part L of the day as either 10%, 20%, 30%, 40%, 50%, or 100% (net zero) improvements for regulated emissions.

Embodied Standards:
Embodied standard: It is possible to set the required embodied carbon standard on an A++ to G rating (which relate to kgCO2e/m2 benchmarks).

The Output Sheet
The output sheet includes details of the specification selected by the tool to meet the input objectives for each of the four dwelling types, as well as operational and embodied carbon performance, cost uplifts, and lifecycle costs including fuel costs and the cost of carbon. Guidance for interpreting the results are given in the Output sheet.

Go to INPUT

Go to OUTPUT

Go to COVER

INPUT Sheet

Go to OUTPUT

Enter information to describe the proposed development. All yellow boxes need to be filled in. The orange boxes are optional if "bespoke" was chosen for the "Fabric Standard" input box.

Development Description		**Guidance/Instructions**
Year of development	2026	Enter the start year of the development. This is used to choose the version of Part L to use, as well as assumptions about building technologies.
Total number of dwellings	1000	Enter the total numer of dwellings to be assessed in the scheme.
% as detached	20%	Enter the percentage of the development that is detached. For example, for a 500 dwelling development with 100 detached dwellings, enter 20%.
% as attached	60%	Enter the percentage of the development that is attached. For these purposes attached means a house that is semi-detached or terraced.
% as 1 bed flat	10%	Enter the percentage of the development that is 1 bed flat. This should be based on number of dwellings rather than buildings, for example a development of 200 dwellings including a building containin 20 x 1 bed flats enter 10%.
% as 2 bed flat	10%	Enter the percentage of the development that is 2 bed flat. The percentage is worked out in a similar way for 1 bed flats above. If there are any 3 bed flats (or larger), include them here.
Build mix check	OK	*If the four percentage values above do not add up to 100%, then an error will be shown here until this is remedied.*
Height of buildings with flats	2	If there are any flats, enter the average height of buildings containing flats across the development. A value of between 2 and 6 can be entered.

Operational Standards		
Building Regulations Minimum Standard	FHS	*This states the version of Part L that will be applied to the development. It assumes a transitional period of 1 year between the implementation of the Future Homes Standard.*
Fabric Standard	No specific fabric standard	To set a minimum fabric performance standard (in kWh/m2 per year) choose from the list here. If no improvements on the minimum requirements are required select "No specific fabric standard" here. In order to specify specific requirements for the fabric or building services, Choose "Bespoke" here and make sure to complete the orange boxes below.
Gas requirement?	Gas Possible	It is possible to ban connection to the gas grid within the tool. To do this select "No gas connection allowed" from the drop-down list. It should be noted that if the scheme is brought forward under the Future Homes Standard (assumed from 2026 here) then gas will not be possible.
Carbon standard	Reduce Part L regulated: 30%	To set a minimum Part L standard (expressed as a % improvement over the minimum requirements) choose from the drop-down list. If no improvements are required select "Meet Part L only". This relates only to "regulated" emissions and does not include emissions associated with e.g. appliances.

Optional Bespoke Specification

This section only needs to be completed IF "Bespoke" has been chosen from the "Fabric Standard" input above.

Walls: Exposed	0.18	Enter the minimum required U-value for any "exposed" external walls in the development.
Walls: Semi-exposed	0.21	Enter the minimum required U-value for any "semi-exposed" external walls in the development.
Floors	0.13	Enter the minimum required U-value for the floors in the development.
Roof	0.13	Enter the minimum required U-value for the roofs in the development.
Doors	1	Enter the minimum required U-value for the doors in the development.
Windows	1.4	Enter the minimum required U-value for the windows in the development.
Air Permeability	5	Enter the minimum air permeability value (m3 per hour per m2 @ 50 Pa) for the development.
Ventilation	Natural Ventilation	The development can be set to have either Natural Ventilation (with extract fans in toilets) or full Mechanical Ventilation with Heat Recovery here.
Ventilation heat recovery eff.	0%	If "Natural Ventilation" has been chosen above, enter 0% here. Otherwise set a minimum required mechancial ventilation heat recovery percentage here.
Heat Source	ASHP	The heat source can be specified as either gas (boiler) or Air Source Heat Pump (ASHP here. It should be noted that if the scheme is brought forward under the Future Homes Standard (assumed from 2026 here) then gas will not be possible.
Waste Water Heat Recovery	None	Waste water heat recovery can be included in the bespoke spefication here, if required.

Note: The calculations consider regulated emissions only, and not undergulated or in-use performance issues.
Note: The analysis is based on a number of housing archetypes with fixed geometry and façade design. It may be possible to improve (or perform worse than!) on the calculated values by optimising form, orientation and façade design.
Note: Options do not include district heating which would need to be assessed on a site by site basis if there is a suitable low carbon heat source nearby
Note: In this model there is no link between MVHR efficeincy and price of MVHR unit.

Embodied Carbon

Target embodied carbon standard	E	A minimum embodied carbon standard for the development can be specified here from the drop-down list. These are based on the LETI benchmark A to G values shown below. The analysis includes "upfront" (i.e. up to the construction) and "embodied" (i.e. also including lifetime maintenance and disposal). Embodied carbon can be ignored in the analysis by choosing "Exclude embodied from analysis" here. It should be noted that the analysis does NOT include any cost implications for embodied carbon standards, as there is insufficient reference information.

Once all the above Inputs have been completed, please go to the Outputs to view the results.

Go to OUTPUT

Embodied Carbon Benchmarks from LETI

Upfront Carbon, A1-5 (exc. sequestration)

Band	Residential
A++	<100
A+	<200
A	<300
B	<400
C	<500
D	<675
E	<850
F	<1000
G	<1200

LETI 2030 Design Target

LETI 2020 Design Target

Embodied Carbon, A1-5, B1-5, C1-4 (inc. sequestration)

Band	Residential
A++	<150
A+	<300
A	<450
B	<625
C	<800
D	<1000
E	<1200
F	<1400
G	<1600

RIBA 2030 Built Target

All values in $kgCO_2e/m^2$ (GIA)

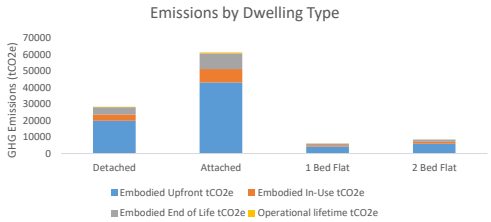
OUTPUT Sheet | Go to COVER | Go to INPUT

Hover over each Result Table Title (red marker) to see guidance on interpreting the results

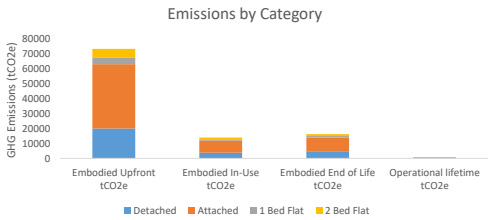
MODEL OPTIMISED SPECIFICATION

Measure	Detached	Attached	1 Bed Flat	2 Bed Flat
Number of Dwellings	200	600	100	100
Scenario Name	Notional Building C&B	Notional Building C&B	35 kWh/m2.year	35 kWh/m2.year
Heating System	ASHP	ASHP	ASHP	ASHP
Ventilation strategy	Natural Ventilation	Natural Ventilation	Natural Ventilation	Natural Ventilation
Walls: Exposed W/m².K	0.18	0.18	0.18	0.18
Walls: Semi-exposed W/m².K	N/A	N/A	0.21	0.21
Floors W/m².K	0.13	0.13	0.15	0.15
Roof W/m².K	0.13	0.13	0.11	0.11
Doors W/m².K	1	1	1.4	1.4
Windows W/m².K	1.4	1.4	1.4	1.2
Air Permeability	5	5	4	5
PV Size kWp	1.2	0.9	0.9	1.1

Graph Notes



Graph Notes



GREENHOUSE GAS EMISSIONS

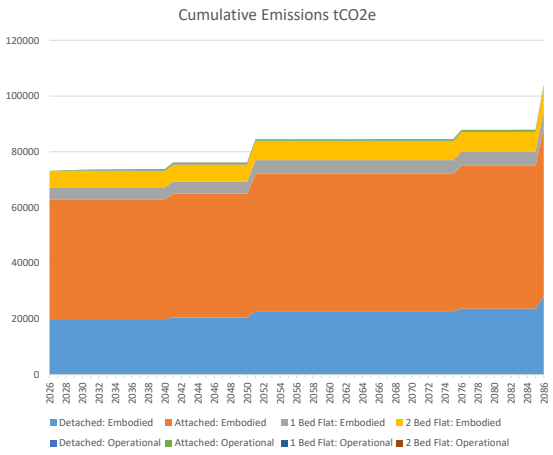
Absolute Emisions

Dwelling Type	Embodied Upfront tCO2e	Embodied In-Use tCO2e	Embodied End of Life tCO2e	Operational lifetime tCO2e	Total Lifetime tCO2e
Detached	19907	3789	4408	220	28324
Attached	43044	8192	9532	476	61244
1 Bed Flat	4250	809	941	32	6032
2 Bed Flat	5959	1134	1319	57	8469
TOTAL	73160	13924	16201	786	104070

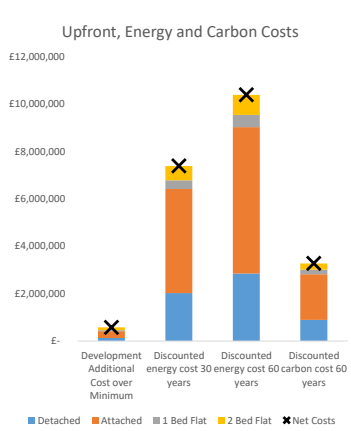
% Emissions

Dwelling Type	Embodied Upfront tCO2e	Embodied In-Use tCO2e	Embodied End of Life tCO2e	Operational lifetime tCO2e	Total Lifetime tCO2e
Detached	19%	4%	4%	0%	27%
Attached	41%	8%	9%	0%	59%
1 Bed Flat	4%	1%	1%	0%	6%
2 Bed Flat	6%	1%	1%	0%	8%
TOTAL	70%	13%	16%	1%	100%

Graph Notes



Graph Notes



COST OUTPUTS

Dwelling Type	Development Additional Cost over Minimum	Av. Dwelling Additional Cost over Minimum	Discounted energy cost 30 years	Discounted energy cost 60 years	Discounted carbon cost 60 years
Detached	£ 130,056	£ 650	£ 2,024,567	£ 2,847,720	£ 890,983
Attached	£ 281,214	£ 469	£ 4,389,694	£ 6,174,466	£ 1,926,531
1 Bed Flat	£ 46,869	£ 469	£ 366,656	£ 515,732	£ 189,583
2 Bed Flat	£ 115,978	£ 1,160	£ 602,689	£ 847,731	£ 266,337
TOTAL	£ 574,117	£ 574	£ 7,383,606	£ 10,385,648	£ 3,273,434

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MID DEVON DISTRICT COUNCIL – NOTIFICATION OF KEY DECISIONS

October 2022

The Forward Plan containing key Decisions is published 28 days prior to each Cabinet meeting

Title of report and summary of decision	Decision Taker	Date of Decision	Officer contact	Cabinet Member	Intention to consider report in private session and the reason(s)
Shopfront Enhancement Scheme To receive a report regarding the Shopfront Enhancement Scheme	Economy Policy Development Group Cabinet	15 Sep 2022 4 Oct 2022	Richard Marsh, Director of Place	Cabinet Member for Planning and Economic Regeneration (Councillor Richard Chesterton)	Open
Tiverton A361/HIF Scheme - update To receive an update.	Cabinet	4 Oct 2022	Richard Marsh, Director of Place	Cabinet Member for Planning and Economic Regeneration (Councillor Richard Chesterton)	Open
Non Statutory Interim Planning Policy Statement: Climate Emergency To approve the interim policy statement for consultation.	Cabinet	4 Oct 2022	Tristan Peat, Forward Planning Team Leader	Cabinet Member for Planning and Economic Regeneration (Councillor Richard Chesterton)	Open

Title of report and summary of decision	Decision Taker	Date of Decision	Officer contact	Cabinet Member	Intention to consider report in private session and the reason(s)
Crediton Neighbourhood Plan - Decision to Adopt (subject to referendum result) To adopt the Neighbourhood Plan.	Cabinet Council	4 Oct 2022 26 Oct 2022	Richard Marsh, Director of Place	Cabinet Member for Planning and Economic Regeneration (Councillor Richard Chesterton)	Part exempt
Data Protection Policy To consider a revised policy	Cabinet	4 Oct 2022	Lisa Lewis, Corporate Manager for Business Transformation and Customer	Cabinet for the Working Environment and Support Services (Councillor Clive Eginton)	Open
Freedom of Information Policy To consider a revised policy	Cabinet	4 Oct 2022	Lisa Lewis, Corporate Manager for Business Transformation and Customer	Cabinet for the Working Environment and Support Services (Councillor Clive Eginton)	Open
Records Management Policy To consider a revised policy	Cabinet	4 Oct 2022	Lisa Lewis, Corporate Manager for Business Transformation and Customer	Cabinet for the Working Environment and Support Services (Councillor Clive Eginton)	Open

Title of report and summary of decision	Decision Taker	Date of Decision	Officer contact	Cabinet Member	Intention to consider report in private session and the reason(s)
Channel Access Policy To consider a revised Policy	Cabinet	1 Nov 2022	Lisa Lewis, Corporate Manager for Business Transformation and Customer	Cabinet for the Working Environment and Support Services (Councillor Clive Eginton)	Open
Tiverton Town Centre Masterplan To agree the draft masterplan for public consultation.	Cabinet	1 Nov 2022	Richard Marsh, Director of Place	Cabinet Member for Planning and Economic Regeneration (Councillor Richard Chesterton)	Open
Medium Term Financial Plan To consider the Medium Term Financial Plan	Cabinet	1 Nov 2022	Andrew Jarrett, Deputy Chief Executive (S151)	Cabinet Member for Finance (Councillor Andrew Moore)	Open
Tiverton EUE Area B Masterplan To consider the outcome of the playing pitch and sports provision review	Cabinet	1 Nov 2022	Richard Marsh, Director of Place	Cabinet Member for Planning and Economic Regeneration (Councillor Richard Chesterton)	Open

Title of report and summary of decision	Decision Taker	Date of Decision	Officer contact	Cabinet Member	Intention to consider report in private session and the reason(s)
Review of Development Management - Discretionary Fees To consider a review of discretionary fees	Cabinet	1 Nov 2022	Director of Place	Cabinet Member for Planning and Economic Regeneration (Councillor Richard Chesterton)	Open
Fees and Charges A report from the Deputy Chief Executive on the level of fees and charges	Cabinet	1 Nov 2022	Andrew Jarrett, Deputy Chief Executive (S151)	Cabinet Member for Finance (Councillor Andrew Moore)	Open
Monitoring Fees for Section 106 Agreements To receive a report reviewing the charging schedule for S106 monitoring fees.	Cabinet	1 Nov 2022	Dean Emery, Corporate Manager for Revenues, Benefits and Recovery	Cabinet Member for Planning and Economic Regeneration (Councillor Richard Chesterton)	Open

Title of report and summary of decision	Decision Taker	Date of Decision	Officer contact	Cabinet Member	Intention to consider report in private session and the reason(s)
Cullompton Town Centre Masterplan and Delivery Plan SPD To consider the masterplan	Cabinet Council	1 Nov 2022 14 Dec 2022	Adrian Welsh, Strategic Manager for Growth, Economy and Delivery	Cabinet Member for Planning and Economic Regeneration (Councillor Richard Chesterton)	Open
Infrastructure Funding Statement To approve the Infrastructure List for publication.	Cabinet	29 Nov 2022	Richard Marsh, Director of Place	Cabinet Member for Planning and Economic Regeneration (Councillor Richard Chesterton)	Open
3 Rivers Developments Ltd - Business Plan To consider a revised business plan.	Cabinet	1 Nov 2022	Andrew Jarrett, Deputy Chief Executive (S151)	Cabinet Member for Finance (Councillor Andrew Moore)	Part exempt
Crediton Master plan – procurement To receive the Crediton Master plan – procurement	Cabinet	1 Nov 2022	Richard Marsh, Director of Place	Cabinet Member for Planning and Economic Regeneration (Councillor Richard Chesterton)	Part exempt

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Electric Vehicle Car Sharing Options To receive an options paper on progressing Electric Vehicle Car Sharing options in the district and to make recommendations to the Cabinet to progress a scheme	Environment Policy Development Group Cabinet	8 Nov 2022 29 Nov 2022	Andrew Busby, Corporate Manager for Property, Leisure and Climate Change	Cabinet Member for the Environment and Climate Change (Councillor Colin Slade)	Open
Economic Recovery Plan To receive the draft Local Economic Recovery Plan	Economy Policy Development Group Cabinet	10 Nov 2022 29 Nov 2022	Richard Marsh, Director of Place	Cabinet Member for Planning and Economic Regeneration (Councillor Richard Chesterton)	Open
Market Environmental Strategy To receive a report regarding the Market Environmental Strategy	Economy Policy Development Group Cabinet	10 Nov 2022 29 Nov 2022	Richard Marsh, Director of Place	Cabinet Member for Planning and Economic Regeneration (Councillor Richard Chesterton)	Open

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3 Rivers Development Ltd Business Plan. To receive the company business plan and if appropriate to make recommendations to Audit Committee on 22 November and / or Cabinet on 29 November.	Scrutiny Committee Audit Committee Cabinet	14 Nov 2022 22 Nov 2022 29 Nov 2022	Andrew Jarrett, Deputy Chief Executive (S151)	Cabinet Member for Finance (Councillor Andrew Moore)	Part exempt
Housing Service Fees and Charges To consider fees and charges.	Homes Policy Development Group Cabinet	15 Nov 2022 29 Nov 2022	Simon Newcombe, Corporate Manager for Public Health, Regulation and Housing	Cabinet Member for Housing and Property Services (Councillor Stuart Penny)	Open
Housing Assistance Policy To consider a revised policy.	Homes Policy Development Group Cabinet	15 Nov 2022 29 Nov 2022	Simon Newcombe, Corporate Manager for Public Health, Regulation and Housing	Cabinet Member for Housing and Property Services (Councillor Stuart Penny)	Open

Title of report and summary of decision	Decision Taker	Date of Decision	Officer contact	Cabinet Member	Intention to consider report in private session and the reason(s)
Strategic Allocations Policy & Strategic Tenancy Strategy To consider a revised strategy.	Homes Policy Development Group Cabinet	15 Nov 2022 29 Nov 2022	Simon Newcombe, Corporate Manager for Public Health, Regulation and Housing	Cabinet Member for Housing and Property Services (Councillor Stuart Penny)	Open
Neighbourhood & Community Standard Policy To consider a revised policy.	Homes Policy Development Group Cabinet	15 Nov 2022 29 Nov 2022	Simon Newcombe, Corporate Manager for Public Health, Regulation and Housing	Cabinet Member for Housing and Property Services (Councillor Stuart Penny)	Open
Empty Homes Plan To consider a revised plan.	Homes Policy Development Group Cabinet	15 Nov 2022 29 Nov 2022	Simon Newcombe, Corporate Manager for Public Health, Regulation and Housing	Cabinet Member for Housing and Property Services (Councillor Stuart Penny)	Open

Title of report and summary of decision	Decision Taker	Date of Decision	Officer contact	Cabinet Member	Intention to consider report in private session and the reason(s)
Housing Strategy update and annual review To consider a review of the strategy.	Homes Policy Development Group Cabinet	15 Nov 2022 29 Nov 2022	Simon Newcombe, Corporate Manager for Public Health, Regulation and Housing	Cabinet Member for Housing and Property Services (Councillor Stuart Penny)	Open
Private Sector Housing Fees and Charges To consider revised fees and charges.	Homes Policy Development Group Cabinet	15 Nov 2022 29 Nov 2022	Simon Newcombe, Corporate Manager for Public Health, Regulation and Housing	Cabinet Member for Housing and Property Services (Councillor Stuart Penny)	Open
Town and Parish Charter To approve a draft Town and Parish Charter for consultation.	Community Policy Development Group Cabinet	22 Nov 2022 3 Jan 2023	Tristan Peat, Forward Planning Team Leader	Cabinet Member for Community Well Being (Councillor Dennis Knowles)	Open
The Council Tax Reduction Scheme & Exceptional Hardship Policy To receive a review of The Council Tax Reduction Scheme & Exceptional Hardship Policy	Community Policy Development Group Cabinet	22 Nov 2022 7 Feb 2023	Dean Emery, Corporate Manager for Revenues, Benefits and Recovery	Cabinet Member for Finance (Councillor Andrew Moore)	Open

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S106 Monitoring Fees	Cabinet	29 Nov 2022	Dean Emery, Corporate Manager for Revenues, Benefits and Recovery	Cabinet Member for Finance (Councillor Andrew Moore)	
Mid Year Treasury Management Report To receive the mid year report.	Cabinet	29 Nov 2022	Andrew Jarrett, Deputy Chief Executive (S151)	Cabinet Member for Finance (Councillor Andrew Moore)	Open
Post Hill Tiverton–Tender results and project award for 70 Council Homes To consider the outcome of the tender process.	Cabinet Council	3 Jan 2023 22 Feb 2023	Andrew Busby, Corporate Manager for Property, Leisure and Climate Change	Cabinet Member for Housing and Property Services (Councillor Stuart Penny)	Part exempt
Meeting Housing Needs SPD To approve the draft SPD for consultation.	Cabinet	3 Jan 2023	Tristan Peat, Forward Planning Team Leader	Cabinet Member for Housing and Property Services (Councillor Stuart Penny)	Open